WHAT IS THE ANNUAL REPORT?

• Only annual collection of public library data
• IMLS core questions + ISL additions
• “...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.”
WHY FILL OUT THE ANNUAL REPORT?

Your Public
- Jobseekers, researchers, journalists
- Transparency

Your Library
- Comparisons: year-to-year, vs other libraries, etc.
- Statistics to support $ requests
- Analyze and respond to community needs

ISL/IMLS
- Historical document
- Year-to-year comparison across state
- Identifying trends
What’s Different in 2019?
What’s Different: Wording

02-003 – Total number of non-resident (non-taxed) registered users →
02-003 – Total number of non-resident registered users

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

09-024 – Current electronic serial subscriptions: Instructions altered to make clear that digital serials that come free with print subscriptions are counted here.
What’s Different: Section 5 Revisions

Per the PLS:

OPERATING EXPENDITURES Operating expenditures are the current and recurrent costs necessary to support the provision of library services. Significant costs, especially benefits and salaries, that are paid by other taxing agencies (government agencies with the authority to levy taxes) “on behalf of” the library may be included if the information is available to the reporting agency. Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Do not report the value of free items as expenditures. Do not report estimated costs as expenditures. Do not report capital expenditures under this category.
What’s Different: New Questions

08-035 Instructional reference services
- This number should also be included in the total number of reference transactions (08-034), and should be entered here only if your library keeps a separate count for this sort of activity. If you do not track this number independent of all other reference transactions, enter NA.

09-025 Non-traditional items, realia, or kits – physical units
- 09-025 Non-traditional items, realia, or kits – physical units – Include physical items that circulate for patron use that have not been counted in any other question. Examples of these materials can include items from a “library of things” (cake pans, power tools), board games, and STEAM kits containing robotics.
1 - General Information: Part 1

Questions relating to standards are in bolded blue font

Grayed boxes are either prefilled (and sometimes locked) or are automatic calculations.

Please provide the most current information available.

<table>
<thead>
<tr>
<th>Question</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>
</tbody>
</table>
Starting the Survey
Timeline

Nov 2019
Annual Report Workshop
Gather data

Dec 2019
Survey goes live mid-month
Directors will receive email w/login instructions

Jan-Feb 2020
Procrastination and/or the completing of the survey

Mar 1 2020
Survey closed
• Log-in and password
• Help contacts
• Data / reports from your staff, circulation, and bookkeeping systems
Navigating the Survey

• Chrome is now the preferred browser
• Click on question numbers for help
  • Disable pop-up blockers
• Use Prev and 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
- Survey
- FAQs
- Instructions
- Printing
Technical Difficulties?

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

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

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

TIME FRAME

You will be reporting on the 2019 calendar year.

Exceptions: - Give the most current information (e.g. early 2020) 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

0X – 001  Question

0X – 002  Standards question

0X – 003  Prefilled

0X – 004  Prefilled and locked (must contact ISL to change)

0X – 005  Calculated total
General Information
Part 1 – General Information

• 01-001  Name of the person preparing this report
• 01-002  Preparer's phone number
• 01-003  Time zone in which the library's administrative entity is located
• 01-004  Library name
• 01-005  Library class
• 01-006  Library director
• 01-007  Street address
• 01-008  City  01-009  ZIP code
• 01-010  Is the mailing address the same as the address listed above?
• 01-011  Mailing address  01-012  Mailing city  01-013  Mailing ZIP code
Part 1 – General Information

• 01-014 Congressional district number
• 01-015 Phone
• 01-016 Fax
• 01-017 Does your library have an answering machine, voicemail or other similar technology?
• 01-018 Library URL
• 01-019 Public library email address, or a means of electronic contact listed on the library's website
Part 1 – General Information: Building Questions

- 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: Building Hours

• 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

• 01-036 Sunday closing time

**Formatting IS important:**

• Eg: 10:00 AM, not 10:00AM or 10:00 A.M.
Part 1 – General Information: Building Hours

• 01-038 Total number of hours the central library is open 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 2019
• 01-043 Total hours the central library was open in 2019
Part 1 – General Information: Internet Access

- 01-044 Does the library provide 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. 20MBPS)
Part 1 – General Information: Branch Information

Use **Remove Group/Add Group** to remove or add branches

- **01-0200** Total number of branches.
  
  (If this answer = 0, skip questions 01-200a through 01-0239.)
# Part 1 – General Information: Branch Information

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-200a</td>
<td>Branch name</td>
</tr>
<tr>
<td>01-201a</td>
<td>Branch name</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 the mailing address the same as the address listed above?</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>Year built</td>
</tr>
<tr>
<td>01-210a</td>
<td>Year of the most recent structural addition or alteration to branch building</td>
</tr>
<tr>
<td>01-211a</td>
<td>Square footage of branch</td>
</tr>
</tbody>
</table>
Part 1 – General Information: Branch Information

01-0212  Number of weeks per year individual branch was open in 2019

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
Part 1 – General Information: Branch Information

01-228a  Does the branch library provide 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
Part 1 – General Information: Bookmobile Information

01-300  Total number of bookmobiles
        (If this answer = 0, skip 01-301a through 01-316)

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 as the address listed above?
01-307a Mailing address

01-308a Phone
01-309a Fax

01-310a Total number of hours the bookmobile is open during a typical week
01-311a Number of weeks per year the bookmobile is open
01-312 Total annual hours of all bookmobiles

**01-500 Total system public service hours per year**
Registrations

PART 2
Changes to your Registrations?

• Please explain any large changes to your registration numbers in a federal note (if the reason is known).

• Edit checks maybe be required for responses that are the same, less than half, or greater than 1.5 times last year’s answers.
## Part 2 – Registrations

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>02-001</td>
<td>Total number of resident registered users</td>
</tr>
<tr>
<td>02-002</td>
<td>Total number of users from contracting areas</td>
</tr>
<tr>
<td>02-003</td>
<td>Total number of non-resident registered users</td>
</tr>
<tr>
<td>02-004</td>
<td>Total number of reciprocal users</td>
</tr>
<tr>
<td>02-005</td>
<td>Total number of PLAC users</td>
</tr>
<tr>
<td>02-006</td>
<td>Total number of non-resident cards issued to student users</td>
</tr>
<tr>
<td>02-007</td>
<td>Total non-resident cards issued to school employees</td>
</tr>
<tr>
<td>02-008</td>
<td>Total number of non-resident cards issued to library employees</td>
</tr>
</tbody>
</table>
Part 2 – Registrations

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 those patrons who have not used their accounts for the past three (3) years and do not owe materials, fines, or fees to the library?
Political Subdivisions

PART 3
## Part 3 – Libraries and Political Subdivisions

<table>
<thead>
<tr>
<th>03-001</th>
<th>Name of primary county</th>
</tr>
</thead>
<tbody>
<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>Debt fund 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?</td>
</tr>
<tr>
<td>03-008</td>
<td>Name of 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>Debt fund tax rate</td>
</tr>
<tr>
<td>03-012</td>
<td>LCPF tax rate</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>03-013</td>
<td>Total district population without contracts</td>
</tr>
<tr>
<td>03-014</td>
<td>Total district population with contracts</td>
</tr>
<tr>
<td>03-015</td>
<td><strong>Political subdivision name</strong></td>
</tr>
<tr>
<td>03-016</td>
<td>Type of political unit (taxed units 1, 2, 3, 4, 9, 11, 12 only)</td>
</tr>
<tr>
<td><strong>03-017</strong></td>
<td>Population 2010 census (taxed and served)</td>
</tr>
<tr>
<td>03-018</td>
<td>Type of political unit (contracting units 5, 6, 7, 8, 10 only)</td>
</tr>
<tr>
<td>03-019</td>
<td>Population 2010 census (served by contract)</td>
</tr>
<tr>
<td>03-020</td>
<td>Were there any changes to your library's service area?</td>
</tr>
<tr>
<td>03-021</td>
<td>If the answer to 03-020 is YES, please explain</td>
</tr>
</tbody>
</table>
Part 3 – Libraries and Political Subdivisions: NOTES

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 unites
   ◦ 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
Library Revenue
Part 4 – Library Revenue: Local Government

04-001  Property tax or CEDIT income from library tax rate
04-002  Miscellaneous income taxes or LIT (Local Income Tax)
04-003  Contractual revenue received for service

04-004  Total local government revenue
Part 4 – Library Revenue: State Government

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 revenue
Part 4 – Library Revenue: Federal Government

04-012 LSTA grants
04-013 Other federal income
04-014 Source(s)

04-015 Total federal income
## Part 4 – Library Revenue: Other

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04-016</td>
<td>PLAC reimbursement</td>
</tr>
<tr>
<td>04-017</td>
<td>Fines and fees</td>
</tr>
<tr>
<td>04-018</td>
<td>Interest on investments</td>
</tr>
<tr>
<td>04-019</td>
<td>Gift receipts</td>
</tr>
<tr>
<td>04-020</td>
<td>Private and public foundation grants</td>
</tr>
<tr>
<td>04-021</td>
<td>Miscellaneous revenue</td>
</tr>
<tr>
<td>04-022</td>
<td>Source(s)</td>
</tr>
</tbody>
</table>

04-023  Total other revenue

04-024  Total revenue
Expenditure Data

PART 5
Operating expenditures are the current and recurrent costs necessary to support the provision of library services. Significant costs, especially benefits and salaries, that are paid by other taxing agencies ...“on behalf of” the library may be included if the information is available to the reporting agency. Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included.

Do not report the value of free items as expenditures.

Do not report estimated costs as expenditures.

Do not report capital expenditures under this category.
Part 5 – Expenditure Data: Staff and Supplies

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
## Part 5 – Expenditure Data: Other Services and Charges

<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: 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, e-readers, and electronic media devices
Part 5 – Expenditure Data: Library Collections

05-023  Books
05-024  Periodicals and newspapers
05-025  Audio/Visual materials, microforms, and other non-printed, physical materials
05-026  E-book, electronic collections, and database licensing/purchase/lease expenditures
05-027  Electronic physical format, including Playaways and e-book readers
Part 5 – Expenditure Data: Non-Operating Fund Materials

This sub-section has been eliminated: operating and non-operating funds are no longer separated.
Part 5 – Expenditure Data: Totals

05-028  Total expenditures for print materials
05-029  Total expenditures for electronic materials
05-030  Total expenditures for other materials
05-031  Total operating fund capital outlays
05-032  Total expenditures for collection development
05-033  Public access computers, e-readers and electronic media devices from all non-operating funds
Part 5 – Expenditure Data: Totals

05-034  Total operating fund expenditures
05-035  Other operating expenditures
05-036  Total operating expenditures
05-037  Total capital fund expenditures
Part 5 – Expenditure Data: Non-Resident Fee Standard

05-038  Total expenditures for collection development, including capital outlays for PACs, e-readers, etc.

05-039  Total 2019 operating expenditures per capita

05-040  Difference between 2019 OE per capita and non-resident fee
  ◦ subtract Q02-009 from Q05-039

05-041a  Does your library's non-resident fee meet the standard?
  ◦ Select YES if 05-047 is a negative number. Select NO if 05-047 is a positive number.

05-042  Total 2019 operating expenditures per capita
  ◦ Please make sure your 2020 non-resident fee is equal or greater than this amount
05-049 Collection development expenditure (from all funds) as a percentage of operating fund expenditure
Capital Revenue

PART 6
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

<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 number of paid hours per week for all ALA-MLS librarians</td>
</tr>
<tr>
<td><strong>07-003</strong></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 number of paid hours per week for all librarians, including ALA-MLS librarians</td>
</tr>
<tr>
<td><strong>07-006</strong></td>
<td>FTE for all librarians</td>
</tr>
</tbody>
</table>
Part 7 – Employment Data: All Other Staff

07-007 Total number of other paid staff
07-008 Total number of paid hours per week for all other paid staff
07-009 FTE for all other paid staff

07-010 Total number of all paid staff
07-011 Total number of paid hours per week for all paid staff
07-012 FTE for all paid staff

07-013 Number of hours per week considered to be full-time employment in your library
Library Service and Technology

PART 8
Part 8 – Library Service and Technology: Interlibrary Loans

08-001 Total number of interlibrary loan items (including photocopies) your library has provided to other libraries

08-002 Evergreen transits to other libraries

08-003 SRCS materials provided to other libraries

08-004 Total number of loans provided to other libraries

08-005 Number of interlibrary items (including photocopies) your library has borrowed from other libraries

08-006 Evergreen transits received from other libraries

08-007 SRCS materials received from other libraries

08-008 Total number of loans received from other libraries

08-009 Net lending rate  \(_{(# \text{items loaned} / # \text{items borrowed})}\)
### Part 8 – Library Service and Technology: Programs

<table>
<thead>
<tr>
<th>Program Type</th>
<th>08-010</th>
<th>08-011</th>
<th>08-012</th>
<th>08-013</th>
<th>08-014</th>
<th>08-015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Children's (0-11 years) Library Programs</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Number of children's programs held in the library</td>
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<tr>
<td>Number of children's programs held outside of the library</td>
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<tr>
<td><strong>Young Adult (12-18 years) Library Programs</strong></td>
<td></td>
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<tr>
<td>Number of young adult programs held in the library</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Number of young adult programs held outside of the library</td>
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</tr>
<tr>
<td><strong>Adult (18+ years) Library Programs</strong></td>
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<tr>
<td>Number of adult programs held in the library</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Number of Adult programs held outside of the library</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>General (All Ages) Library Programs</strong></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Number of general programs held in the library</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of general programs held outside of the library</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Part 8 – Library Service and Technology: Programs

08-018  Total number of non-library sponsored programs

08-019  Total number of all library sponsored programs
Part 8 – Library Service and Technology: 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 Children’s Reading Program did you 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

08-035  Instructional reference services

• Answer only if you track; NA if not

• Instructional reference services includes one-on-one interactions that are considered reference transactions by the national definition, but are typically far more time consuming and involved than traditional reference transactions. This is meant to capture more involved instruction, and not simple one-off questions such as turning on a device, finding an icon, etc. They may be scheduled in advance or drop-in consultations. Examples include help on small device use (e-readers, smartphones), computer instruction, resume help, and proctoring.
Part 8 – Library Service and Technology: Electronic Collections (and Databases)

08-036  Number of state-licensed databases (INSPIRE)

08-037  Number of local and other licensed databases (not INSPIRE)

08-038  Name(s) of public use/commercial databases to which the library subscribes

08-039  Total electronic collections
Part 8 – Library Service and Technology: Public Computers

08-040 Number of public internet computer uses per year

08-041 Number of wireless internet uses per year

08-042 Number of public computers, system-wide

08-043 Number of staff computers

08-044 Number of website visits
08-045 Does your library have an automated bookkeeping system? Y/N

08-046 Name of bookkeeping system

08-047 Brand and version of Integrated Library System (ILS)
Circulation and Holdings

PART 9
Part 9 – 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
### Part 9 – Circulation and Holdings: Selected Holdings

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-009</td>
<td>Books (print)</td>
</tr>
<tr>
<td>09-010</td>
<td>Does the library belong to an e-book consortium?</td>
</tr>
<tr>
<td>09-011</td>
<td>Name of e-book consortium</td>
</tr>
<tr>
<td>09-012</td>
<td>E-books (LOCAL HOLDINGS)</td>
</tr>
<tr>
<td>09-013</td>
<td>E-books (CONSORTIUM HOLDINGS)</td>
</tr>
<tr>
<td>09-014</td>
<td>E-books (TOTAL)</td>
</tr>
</tbody>
</table>
# Part 9 – Circulation and Holdings: Selected Holdings

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-015</td>
<td>Video materials – physical units</td>
<td>09-019</td>
<td>Audio materials – physical units</td>
</tr>
<tr>
<td>09-016</td>
<td>Video materials – downloadable units</td>
<td>09-020</td>
<td>Audio materials – downloadable units</td>
</tr>
<tr>
<td></td>
<td>(LOCAL HOLDINGS)</td>
<td></td>
<td>(LOCAL HOLDINGS)</td>
</tr>
<tr>
<td>09-017</td>
<td>Video materials – downloadable units</td>
<td>09-021</td>
<td>Audio materials – downloadable units</td>
</tr>
<tr>
<td></td>
<td>(CONSORTIUM HOLDINGS)</td>
<td></td>
<td>(CONSORTIUM HOLDINGS)</td>
</tr>
<tr>
<td>09-018</td>
<td>Video materials – downloadable units (TOTAL)</td>
<td>09-022</td>
<td>Audio materials – downloadable units (TOTAL)</td>
</tr>
</tbody>
</table>
Part 9 – Circulation and Holdings: Selected Holdings

09-023 Current print serial subscriptions

09-024 Current electronic serials subscriptions
Library Board

PART 10
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
Part 10 – Library Board

<table>
<thead>
<tr>
<th>Code</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-0001</td>
<td>Position: President</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 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>
Part 10 – Library Board

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 Section

PART 11
Part 11 – Salary Section

Provide most current information (2020 salaries, if known)

Provide info for positions not currently occupied

Looking for salary *schedule* - not necessarily what current position-holders make
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?
Part 11 – Salary Section: All Other Positions
### Part 11 – Salary Section: Benefits – Full-Time

<table>
<thead>
<tr>
<th>Code</th>
<th>Benefit Description</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) has to be filled by the employer</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>11-513</td>
<td>PERF</td>
</tr>
<tr>
<td>11-514</td>
<td>Deferred compensation</td>
</tr>
<tr>
<td>11-515</td>
<td>Health insurance</td>
</tr>
<tr>
<td>11-516</td>
<td>Health Savings Account (HSA)</td>
</tr>
<tr>
<td>11-517</td>
<td>Dental insurance</td>
</tr>
<tr>
<td>11-518</td>
<td>Life insurance</td>
</tr>
<tr>
<td>11-519</td>
<td>Vision insurance</td>
</tr>
<tr>
<td>11-520</td>
<td>Disability insurance</td>
</tr>
<tr>
<td>11-521</td>
<td>Paid time off for continuing education</td>
</tr>
<tr>
<td>11-522</td>
<td>Reimbursement for continuing education</td>
</tr>
<tr>
<td>11-523</td>
<td>Other 1 (specify)</td>
</tr>
<tr>
<td>11-524</td>
<td>Other 2 (specify)</td>
</tr>
</tbody>
</table>
# Part 11 – Salary Section: Paid Time Off Per Year

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

Indiana Code: http://iga.in.gov/legislative/laws/2019/ic/titles/036#36-12

Indiana Administrative Code: http://www.in.gov/legislative/iac/iac_title?iact=590
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: Board and Directors

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)
Part 13 – Compliance with Standards for Public Libraries: Plans and Policies

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
Part 13 – Compliance with Standards for Public Libraries: Personnel Policies

Has the library board adopted the written personnel policies and procedures dealing with:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</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: Boards and Bylaws

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:

13-041  …a statement of community needs and goals?

13-042  …measurable objectives and service in response to the community’s needs and goals?

13-043  …an assessment of facilities, services, technology, and operations?

13-044  …an ongoing evaluation process?

13-045  …a plan for financial resources and sustainability?

13-046  …an equipment replacement schedule?

13-047  …a professional development strategy?

13-048  …a statement of collaboration with other public libraries?

13-049  …a statement of collaboration with other community partners?
Part 13 – Compliance with Standards for Public Libraries: Resource Sharing

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.
Part 13 – Compliance with Standards for Public Libraries: Resource Sharing

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?
Part 13 – Compliance with Standards for Public Libraries: Services

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.
Part 13 – Compliance with Standards for Public Libraries: Public Access

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/on 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?
Supplemental Questions

PART 15
Part 15 – Supplemental Questions: Library of Things

15-001  Do you have a library of things – non-traditional library items – available for circulation? Y/N

15-001a  If the answer to 15-001 is YES, which of the following do you offer? Select all that apply.

- Board games
- Puzzles
- Kitchen equipment
- Musical instruments
- Recreation equipment (fishing rods, bird watching kits, badminton, etc.)
- STEM items (coding and robotics kits, littleBits, etc.)
- Tools/hardware
- Other (list) ___________________________________________
Part 15 – Supplemental Questions: Scheduling and Reservation Tools

15-002 Does your library use scheduling software for employee schedules?  Y/N
15-002a Name of scheduling software?

15-003 Does your library use software to make meeting room reservations?  Y/N
15-003a Name of meeting room reservation software?
15-003b Can patrons use the software directly to make their own reservations?  Y/N

15-004 Does your library use software to register patrons for programs?  Y/N
15-004a Name of patron registration software?
15-004b Can patrons use the software directly to register themselves/family for programs?  Y/N
Part 15 – Supplemental Questions: Other

15-005 Does your library use a people-counter?
15-005a Brand/manufacturer of people-counter?

15-006 Does your library have a library pet?
15-006a Name(s) and species of pet?
Click [here](#) to print a copy of the Signature Page. This needs to be signed by both the director and board president in ink and returned via mail to the Indiana State Library Development Office. This is also due by March 1, 2019.

Certifying the Report

- Signatures
- Postmarked 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.
Submitting the Report

Step 2: Go to the Status tab OR the Submit Survey tab and click the green button.
Celebrate!
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