

# CALIFORNIA PUBLIC LIBRARY SURVEY INSTRUCTIONS FY 20/21

This document provides definitions of data elements collected annually from California public libraries for the Public Libraries Survey. The report incorporates data elements requested by the Public Library Statistics Cooperative coordinated by the Institute of Museum and Library Services.

Note: “-1” means a statistic was unavailable. It does not mean “0” (zero).

# Section 2: Population and Outlets

## Population

### Population of Legal Service Area

Figure is based upon the California Dept. of Finance, Demographic Research Unit E-1 report issued each May 1st.

### Borrowers-Registered Users as of June 30

A registered user is a library user who has applied for and received an identification number or card from the public library that has established conditions under which the user may borrow library materials and gain access to other library resources.

NOTE: For the purposes of reporting this data element, files should have been purged within the past three (3) years.

### Children Borrowers

Number of children registered with the library for circulation and other services, as of June 30 of the Report Year. Report individual rather than household registration. Files should have been purged at least once within the last three years. Children borrowers are those who receive a child/youth library card. Specific age can vary by library system.

## Outlets

### Main (Central) Library

If jurisdiction has a central or main library open for public service, enter "1". Do not report administrative headquarters if not open for public library service. If there is no central or main library then enter “0” (zero).

### Number of Branch Libraries

A branch library is an auxiliary unit of an administrative entity which has at least all of the following:

* Separate quarters
* An organized collection of library materials
* Paid staff
* Regularly scheduled hours open to the public

### Number of Bookmobiles

A traveling branch library. A bookmobile consists of at least all of the following:

* A Truck or van that carries an organized collection of library materials
* Paid staff
* Regularly scheduled hours for being open to the public

Enter number of vehicles in public service, not number of stops made. Do not include non-public delivery vehicles or other library vehicles.

### Total # of Outlets

### Number of other library outreach vehicles or structures

Examples include book bikes, vans, trucks, kiosks, or carts that do not go out on a set schedule to set stops or are not staffed.

### Total Square Footage

This item is automatically totaled from entries of square footage in the outlets section (Section 10).

# Section 3: Library Income

## Operating Revenue

Report revenue used for operating expenditures as defined below. Include federal, state, local, or other grants. DO NOT include revenue for major capital expenditures, contributions to endowments, revenue passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover). (Funds transferred from one public library to another public library should be reported by only one of the public libraries. The State Data Coordinator shall determine which library will report these funds.) Report whole dollars only (omit cents).

### Local Government

This includes all local government funds designated by the community, district, or region and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, library fines, fees, or grants. Include contract payments from another jurisdiction for library services provided. Do not include state, federal, and other funds passed through local government for library use. Report these funds with state government revenue or federal government revenue, as appropriate.

NOTE: Significant funding provided by other local government agencies with the authority to levy taxes “on behalf of” the library should be included if the information is available to the reporting agency and if such funds are supported by documentation (such as certified budgets, payroll records, etc.).

### State Funds

These are all funds distributed to public libraries by state government for expenditure by the public libraries, except for federal money distributed by the state. This includes funds from such sources as penal fines, license fees, and mineral rights. Includes CLLS literacy programs.

NOTE: If operating revenue from consolidated taxes is the result of state legislation, the revenue should be reported under state revenue (even though the revenue may be from multiple sources).

### Federal Funds

This includes all federal government funds distributed to public libraries for expenditure by the public libraries, including federal money distributed by the state. Include funds from the federal Library Services and Technology Act (LSTA) program, or other federal programs.

### All Other Operating Income

This is all operating income other than that reported under local, state, and federal (items #301, #302, and #303). Include, for example, monetary gifts and donations received in the current year, interest, library fines, fees for library services, or grants from private sources. Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donations.

## Capital Revenue

Report all revenue to be used for major capital expenditures, by source of revenue. Include funds received for (a) site acquisition; (b) new buildings; (c) additions to or renovation of library buildings; (d) furnishings, equipment, and initial collections (print, non-print, and electronic) for new buildings, building additions, or building renovations; (e) computer hardware and software used to support library operations, to link to networks, or to run information products; (f) new vehicles; and (g) other one-time major projects. Exclude revenue to be used 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). Funds transferred from one public library to another public library should be reported by only one of the public libraries. Report whole dollars only (omit cents). Note that the amounts reported for Total Capital Revenue and Total Capital Expenditures are not expected to be equal. Report federal, state, local, and other revenue to be used for major capital expenditures in the following categories:

### Local government

Report all governmental funds designated by the community, district, or region and available to the public library for the purpose of major capital expenditures, except for state and/or federal money distributed by the local government.

### State funds

Report all funds distributed to public libraries by state government for expenditure by the public libraries for the purpose of major capital expenditures, except for federal money distributed by the state.

### Federal funds

Report federal governmental funds, including federal funds distributed by the state or locality, and grants and aid received by the library for the purpose of major capital expenditures.

### Other capital income

Report private (non-governmental funds), including grants received by the library for the purpose of major capital expenditures.

# Section 4: Library 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. Report whole dollars only, omit cents. Include local, state, federal, and other funding sources.

## Staff Expenditures

### Salaries & Wages

This includes salaries and wages for all library staff (including plant operations, security, and maintenance staff) for the fiscal year. Include salaries and wages before deductions but exclude employee benefits. County libraries must include salary for County Librarian.

### Employee Benefits

These are the benefits outside of salaries and wages paid and accruing to employees (including plant operations, security, and maintenance staff), regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts for direct paid employee benefits including Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, worker's compensation, tuition, and housing benefits.

## Collection Expenditures

This includes all operating expenditures from the library budget for all materials in print, microform, electronic, and other formats considered part of the collection, whether purchased, leased, or licensed. Exclude charges or fees for interlibrary loans and expenditures for document delivery.

### Print Materials

Report all operating expenditures for the following print materials: books, serial backfiles, government documents, and any other print acquisitions (except current print serial subscriptions).

### Print Serial Subscriptions

Expenditure for current print serials including newspapers, periodicals, annual reports, yearbooks, and proceedings.

### Total Print Material Expenditures

This is an auto-calculated sum of 4.4 and 4.5

### Electronic Materials Expenditures

Report all operating expenditures for electronic (digital) materials. Types of electronic materials include e-books, audio and video downloadables, e-serials (including journals), government documents, databases (including locally mounted, full text or not), electronic files, reference tools, scores, maps, or pictures in electronic or digital format, including materials digitized by the library. Electronic materials can be distributed on magnetic tape, diskettes, computer software, CD-ROM, or other portable digital carrier, and can be accessed via a computer, via access to the Internet, or by using an e-book reader. Include expenditures for materials held locally and for remote materials for which permanent or temporary access rights have been acquired. Include expenditures for database licenses. [NOTE: Based on ISO 2789 definition.]

Note: Expenditures for computer software used to support library operations or to link to external networks, including the Internet, are reported under Other Operating Expenditures.

### Other Materials

Report all operating expenditures for other materials, such as microform, audio and video physical units, DVD, and materials in new formats.

### Total Collection Expenditures

### 4.10 All Other Operating Expenditures

This includes all expenditures other than those reported for Total Staff Expenditures and Total Collection Expenditures.

NOTE: Include expenses such as binding, supplies, repair or replacement of existing furnishings and equipment; and costs of computer hardware and software used to support library operations or to link to external networks, including the Internet. Report contracts for services, such as costs of operating and maintaining physical facilities, and fees paid to a consultant, auditor, architect, attorney, etc.

## Capital Expenditures

### Total Capital Expenditures

Report major capital expenditures (the acquisition of or additions to fixed assets). Examples include expenditures for (a) site acquisitions; (b) new buildings; (c) additions to or renovation of library buildings; (d) furnishings, equipment, and initial book stock for new buildings, building additions, or building renovations; (e) library automation systems; (f) new vehicles; and (g) other one-time major projects. Include federal, state, local, or other revenue used for major capital expenditures. Only funds that are supported by expenditure documents (e.g., invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Estimated costs are not included. Exclude expenditures for replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. Exclude contributions to endowments, or revenue passed through to another agency (e.g., fines). Funds transferred from one public library to another public library should be reported by only one of the public libraries.

# Section 5: Library Staff

Report figures as of the last day of the fiscal year. Include all positions funded in the library’s budget whether those positions are filled or not.

## Staff

### Total count of persons employed

Total count of all persons employed in library and support services, funded in the library’s budget, full-time and part- time, as of June 30, 2021. Each person employed counts as one, whether they are employed full or part time.

For the following categories, to ensure comparable data, 40 hours per week has been set as the measure of full-time employment (FTE). For example, 60 hours per week of part-time work by employees in a staff category divided by the 40-hour measure equals 1.50 FTEs.

### ALA Librarians

FTE Librarians with master's degrees from programs of library and information studies accredited by the American Library Association.

### FTE Total Librarians

Persons with the title of librarian who do paid work that usually requires professional training and skill in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. This data element also includes ALA Librarians (Item 5.2)

### All Other Paid Staff

This includes all other FTE employees paid from the reporting unit budget, including plant operations, security, and maintenance staff.

### Total Staff FTE

This is an auto-calculated sum of 5.3 and 5.4

## Volunteers

### Volunteers

FTE volunteer workers, average per week. Enter number of persons in Full Time Equivalents, not number of hours worked. A person who volunteers ten hours a week would be counted as .25 FTE, i.e., one quarter the time of a full-time person. This includes all persons who were not on the library’s payroll but were providing a service to/for the library, volunteers, Friends and literacy volunteers.

## Salary Survey

Complete entries for this reporting year. Report beginning step and final step of monthly salary range in whole dollars; omit cents. If payment is made in other than monthly increments, compute monthly equivalent. Only ten positions are surveyed; do not add positions of your library not included on the survey. If your library has more than one class of position as described, report the highest salary range.

### Library Director

Chief Administrator of library

### Assistant Director

Deputy line position with library-wide responsibilities; not administrative assistant

### Chief of Division

Professional line position supervising other staff

### Clerk

Beginning employee without library work experience or special training; not hourly or student paging help

### Information Technology Specialist

Staff primarily assigned to select, purchase, install, inventory, and maintain the library’s IT equipment. May train and assist staff on library technology. May build and maintain the library’s website. (New in FY20-21)

### Librarian I

Beginning professional with library training but normally without previous professional library work experience. (Formerly called Entry Level Librarian)

### Librarian II

Professional with library training and normally with previous professional library work experience. (Formally called Journeyman Librarian)

### Librarian III

Professional line position normally supervising other staff in branch library location. (Formerly called Branch Librarian)

### Library Assistant

Staff member with a Bachelor’s or Associate’s degree, may require specialized training or job skills/experience but does not require an MLS. (Formerly Library Technical Assistant)

### Manager

Manager of special library service, normally not a Librarian but professional in another field (e.g., Business Manager, Personnel Officer, Literacy)

# Section 6: Library Collection

This section of the survey collects data on selected types of materials. It does not cover all materials (i.e., microforms, loose sheet music, maps, and pictures) for which expenditures are reported under Print Materials Expenditures, Electronic Materials Expenditures, and Other Materials Expenditures.

Under this category 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.

## Print Materials and Physical Items

### Books Children Held as of June 30

Total number of Children's Books held on June 30 of report year. Include cataloged and uncataloged print materials (number of items, not number of titles). Do not include serials, periodicals, or other formats.

### Books Young Adult Held.

Total number of Young Adult books held on June 30 of report year. Include cataloged and uncatalogued print materials (number of items, not number of titles). Do not include serials, periodicals, or other formats. Should we put these beneath books held?

### Print Materials

Report a single figure that includes the following: books in print. Books are non-serial printed publications (including music scores or other bound forms of printed music, and maps) that are bound in hard or soft covers, or in loose-leaf format. Do not include unbound sheet music. Include non-serial government documents. Report the number of physical units, including duplicates. For smaller libraries, if volume data are not available, count the number of titles. Books packaged together as a unit (e.g., a 2-volume set) and checked out as a unit are counted as one physical unit.

### Audio – physical units.

These are materials circulated in a fixed, physical format on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically, electronically, or both. Include records, audiocassettes, audio cartridges, audio discs (including audio CD-ROMs), audio- reels, talking books, and other sound recordings stored in a fixed, physical format. Do not include downloadable electronic audio files. Report the number of units, including duplicates. Items packaged together as a unit (e.g. two audiocassettes for one recorded book) and checked out as a unit are counted as one physical unit.

### Video – physical units

These are materials circulated in a fixed, physical format on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver or computer monitor. Video formats may include tape, DVD and CD-ROM. Do not include downloadable electronic video files. Report the number of units, including duplicates. Items packaged together as a unit (e.g. two DVDs for one movie) and checked out as a unit are counted as one physical unit).

### Other Physical Items in Collection

Report a single figure that includes the following: all circulating physical items other than print materials (6.3), physical audio units (6.4), physical video units (6.6), and serials. These are materials in a fixed, physical format available for use outside the library. These can include a variety of items types, such as wi-fi hotspots, sewing machines, cake pans, tools, etc.

Report the number of units, including duplicates. Items packaged together as a unit (such as a set of cookie cutters) and checked out as a unit are counted as one physical unit.

### Total Physical Items in Collection

Auto-calculated. All circulating physical items in the collection. These are materials in a fixed, physical format available for use outside the library. This includes Print Materials, Audio – physical units, Video – physical units, and Other Circulating Physical Items.

### (Optional) Current Print Serial Subscriptions

Reporting this element is optional, and it is not included in total physical items in collection. Report the number of current print serial subscriptions, including duplicates, for all outlets. Examples of serials are periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series.

## Electronic Items

### Electronic Books

 (See CSL Flowchart “Counting Electronic Items and Usage” for assistance) E-books are digital documents (including those digitized by the library), licensed or not, where searchable text is prevalent, and which can be seen in analogy to a printed book (monograph). E-books are loaned to users on portable devices (e-book readers) or by transmitting the contents to the user’s personal computer for a limited time. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired. Report the number of electronic units, including duplicates, at the administrative entity level; do not duplicate unit count for each branch. E-books packaged together as a unit (e.g., multiple titles on a single ebook reader) and checked out as a unit are counted as one unit.

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.

NOTE: For purposes of this survey, units are defined as “units of acquisition or purchase”. The “unit” is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users.

Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units”. For smaller libraries, if volume data are not available, the number of titles may be counted.

Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 “units”.

### Audio – downloadable units.

 (See CSL Flowchart “Counting Electronic Items and Usage” for assistance) These are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced (played back) electronically. Audio – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include Audio – Downloadable Units for which permanent or temporary access rights have been acquired.

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.

NOTE: For purposes of this survey, units are defined as “units of acquisition or purchase”. The “unit” is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users.

Finite simultaneous use: units of acquisition or purchase is based on the number

of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units. For smaller libraries, if volume data are not available, the number of titles may be counted.

Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 “units”.

### Video – downloadable units

 (See CSL Flowchart “Counting Electronic Items and Usage” for assistance) These are downloadable electronic files on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver, computer monitor or video-enabled mobile device. Video – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include Video– Downloadable Units held locally and remote Video – Downloadable Units for which permanent or temporary access rights have been acquired.

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.

NOTE: For purposes of this survey, units are defined as “units of acquisition or purchase”. The “unit” is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users.

Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units.” For smaller libraries, if volume data are not available, the number of titles may be counted.

Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 “units”.

## Electronic Collections. (Formerly Licensed Databases)

(See CSL Flowchart “Counting Electronic Items and Usage” for assistance) Report the number of electronic collections. An electronic collection is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts, photographs, music, video, etc.) with a common user interface and software for the retrieval and use of the data. An electronic collection may be organized, curated and electronically shared by the library, or rights may be provided by a third-party vendor. An electronic collection may be funded by the library, or provided through cooperative agreement with other libraries, or through the State Library. Do not include electronic collections that are provided by third parties and freely linked to on the web.

Electronic Collections do not have a circulation period and may be retained by the patron. Remote access to the collection may or may not require authentication. Unit records may or may not be included in the library’s catalog; the library may or may not select individual titles. Include electronic collections that are available online or are locally hosted in the library.

Note: The data or records are usually collected with a particular intent and relate to a defined topic.

Number of electronic collections acquired through curation, payment or formal agreement, by source of access:

### Funded by local/other cooperative agreements (or consortia) within state or region

### Funded by state government or State library funded

NOTE: In FY19-20, the State Library provided Archives Unbound, the New York Times Online, Britannica, Teaching Books, Proquest, and Brainfuse (JobsNow/VetsNow). This number should not be higher than 6.

# Section 7: Library Services

## Hours

### Hours Open, All Outlets

This is the auto-calculated sum of annual public service hours from the outlet and bookmobile sections.

## Visits

### Library Visits

This is the total number of persons entering the library for whatever purpose during the year.

NOTE: If an actual count of visits is unavailable, determine an annual estimate by counting visits during a typical week in October and multiplying the count by 52. A “typical week” is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or the library. Choose a week in which the library is open its regular hours. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open).

### Library visits reporting method

Regarding the number of Library Visits (data element #7.2) entered, is this an annual count or an annual estimate based on a typical week or weeks?

Select one of the following:

CT—Annual Count

ES—Annual Estimate Based on Typical Week(s)

## Reference

### Reference Questions

Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs.

Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements.

NOTES:

A reference transaction includes information and referral service, unscheduled individual instruction and assistance in using information sources (including websites and computer-assisted instruction).

Count Readers Advisory questions as reference transactions.

Information sources include

(a) printed and nonprinted material;

(b) machine-readable databases (including computer-assisted instruction);

(c) the library’s own catalogs and other holdings records;

(d) other libraries and institutions through communication or referral; and

(e) persons both inside and outside the library.

When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again.

If a contact includes both reference and directional services, it should be reported as one reference transaction.

Duration should not be an element in determining whether a transaction is a reference transaction.

Do not include transactions that include only a directional service, such as instruction for locating staff, library users, or physical features within the library. Examples of directional transactions include, “Where is the reference librarian? Where is Susan Smith? Where is the rest room? Where are the 600s? Can you help me make a photocopy?”

Annual Count vs. Annual Estimate

If an annual count of reference transactions is unavailable, count reference transactions during a typical week or weeks, and multiply the count to represent an annual estimate.

A “typical week” is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or in the library. Choose a week in which the library is open its regular hours.

Example: If there are four weeks sampled, multiply the totals for those four weeks by 13 to get an estimate for the full year. If the sample is done twice a year (one week at each time, two weeks total) multiply the count by 26 to get the estimated annual count.

### Reference transactions reporting method

Regarding the number of Reference Transactions (data element #7.3) entered, is this an annual count or an annual estimate based on a typical week or weeks?

Select one of the following:

CT—Annual Count

ES—Annual Estimate Based on Typical Week(s)

## Circulation

### Late fines

Do you charge borrowers for late returns of print materials? Y/N

### Charge per day for Adults

Enter amount of charged per item, per day late

### Charge per day for Teens

Enter amount of charged per item, per day late

### Charge per day for Children

Enter amount of charged per item, per day late

### Laptop Lending

Does your library provide laptop computers for patrons to borrow?

### Hot Spot Lending

Does your library provide internet hot spots for patrons to borrow?

### Circulation of Children's Materials

Total circulation (including renewals) of cataloged and uncatalogued materials (in all formats) marked as Children's whether they are borrowed by a child, young adult, or adult over the course of the report year.

### Circulation of Non-English Materials

Count of total non-English language materials in all formats (Adult, YA, and Children's) circulated annually.

### Inter-library Loans to others

Annual count of items provided via ILL to other libraries.

### Inter-library Loans received

Annual count of items received via ILL from other libraries.

### Circulation of Other Physical Items

Circulation of all physical items other than print books, physical audio units, physical video units, and serials, including renewals. These are materials in a fixed, physical format available for use outside the library. These can include a variety of items types, such as wi-fi hotspots, sewing machines, cake pans, tools, telescopes, board games, video games, etc.

### Physical Item Circulation

The total annual circulation of ALL physical library materials of all types, including renewals.

NOTE: Count all physical materials in all formats that are charged out for use outside the library. Interlibrary loan transactions included are only items borrowed for users. Do not include items checked out to another library.

### Circulation of Electronic Materials

 (See CSL Flowchart “Counting Electronic Items and Usage” for assistance) Electronic Materials are materials that are distributed digitally and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Types of electronic materials include e-books and downloadable electronic video and audio files. Electronic Materials packaged together as a unit and checked out as a unit are counted as one unit. Include circulation only for items counted under Electronic Books (E-Books), Audio-Downloadable Units and Video-Downloadable Units in Section 6: Library Collection (Items 6.4, 6.6, and 6.8). Do not include items not specified under those definitions.

### Successful Retrieval of Electronic Information

 (See CSL document “Counting Successful Retrieval of Electronic Information” for assistance) The number of full-content units or descriptive records examined, downloaded, or otherwise supplied to user, from online library resources that require user authentication but do not have a circulation period. Examining documents is defined as having the full text of a digital document or electronic resource downloaded or fully displayed. Some electronic services do not require downloading as simply viewing documents is normally sufficient for user needs. Include use both inside and outside the library. Do not include use of the OPAC or website. [based on NISO Standard Z39.7 (2013) #7.7, p. 43]

See Appendix A “Counting Successful Retrieval of Electronic Materials” on page 42 for examples.

These are library materials, or copies of the materials, provided to or received from one autonomous library to another upon request. The libraries involved in interlibrary loans are not under the same library administration. “Library Administration” means Administrative Entity (not anything broader). Do not include items loaned between outlets within the same library administrative entity. These data are reported as annual figures.

### Total Annual Circulation

Auto-calculated: The sum of Circulation of Electronic Materials and Circulation of Physical Material

### Electronic Content Use

Auto-calculated: The sum of Circulation of Electronic Materials and Successful Retrievals of Electronic Information

### Total Content Use

Auto-calculated: The sum of Total Annual Circulation and Electronic Content Use

# Programming

A program is any planned event which introduces the group attending to any of the broad range of library services or activities or which directly provides information to participants. Programs may cover use of the library, library services, or library tours. Programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of programs include film showings; lectures; story hours; literacy, English as a second language, and citizenship classes; and book discussions.

Count all programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Exclude programs sponsored by other groups that use library facilities. If programs are offered as a series, count each program in the series. For example, a film series offered once a week for eight weeks should be counted as eight programs. Report the number of programs and attendance, by age group.

NOTE: Exclude library activities delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, resume writing assistance, homework assistance, and mentoring activities.

## Programming for Children 0-5

A program session targeted at children ages 0-5 is any planned event for which the primary audience is infants, toddlers, or preschool-age children. Examples of these types of program sessions include, but are not limited to, story hours, every child ready to read programs, musical or sing-along events, and puppet shows. Include program sessions aimed at children ages 0-5 even if adult caregivers also attend. Each program session should only be counted in one age category based on its primary target audience.

Count all 0-5 children’s programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include children’s programs sponsored by other groups that use library facilities. If children’s programs are offered as a series, count each program in the series. For example, a story hour offered once a week, 48 weeks a year, should be counted as 48 programs. Exclude library activities for children delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.

### Total # of All Live Children’s Programs for ages 0-5

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### # of Live, **In-person** Children’s Programs for ages 0-5

A 0-5 program where library staff (or other party sponsored by the library) and participants are physically located in the same location at the same time during the program.

### # of Live, **Virtual** Children’s programs for ages 0-5

A 0-5 children’s library program conducted via a Web conferencing or Webinar platform such as Facebook, YouTube, or Zoom, during which a library staff member (or other party sponsored by the library) is presenting to or interacting with an audience in real-time.

### Total attendance at All Live Children’s programs for ages 0-5

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### Attendance at Live, **In-person** Children’s programs for ages 0-5

Count all people who attend 0-5 programs regardless of age. Participants and library staff (or other party sponsored by library) are physically located in same location during the program.

### Attendance at Live, **Virtual** Children’s programs for ages 0-5

Regardless of the number of formats in which a program session is offered, each attendee or view should only be counted once. Count each participant device connected to a virtual program as a single attendee. For program sessions hosted on Facebook Live, YouTube Live, or similar platforms, count peak concurrent viewers. For those hosted on videoconferencing platforms, count the maximum number of non-staff participants during the session.

## Programming for Children 6-11

A program session targeted at children ages 6-11 is any planned event for which the primary audience is elementary-school-age children. Examples of these types of program sessions include, but are not limited to, story hours, science events, crafting classes, and summer reading events. Include program sessions aimed at children ages 6-11 even if adult caregivers also attend with the children. Each program session should only be counted in one age category based on its primary target audience.

Count all 6-11 children’s programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include children’s programs sponsored by other groups that use library facilities. If children’s programs are offered as a series, count each program in the series. For example, a story hour offered once a week, 48 weeks a year, should be counted as 48 programs. Exclude library activities for children delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.

### Total # of All Live Children’s Programs for ages 6-11

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### # of Live, **In-person** Children’s Programs for ages 6-11

A 6-11 program where library staff (or other party sponsored by the library) and participants are physically located in the same location at the same time during the program.

### # of Live, **Virtual** Children’s programs for ages 6-11

A 6-11 children’s library program conducted via a Web conferencing or Webinar platform such as Facebook, YouTube, or Zoom, during which a library staff member (or other party sponsored by the library) is presenting to or interacting with an audience in real-time.

### Total attendance at All Live Children’s programs for ages 6-11

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### Attendance at Live, **In-person** Children’s programs for ages 6-11

Count all people who attend 6-11 programs regardless of age. Participants and library staff (or other party sponsored by library) are physically located in same location during the program.

### Attendance at Live, **Virtual** Children’s programs for ages 6-11

Regardless of the number of formats in which a program session is offered, each attendee or view should only be counted once. Count each participant device connected to a virtual program as a single attendee. For program sessions hosted on Facebook Live, YouTube Live, or similar platforms, count peak concurrent viewers. For those hosted on videoconferencing platforms, count the maximum number of non-staff participants during the session.

## Young Adult Programming

A Young Adult (YA) program is any planned event for which the primary audience is young adults age 12 to 18 and which introduces the group of young adults attending to any of the broad range of library services or activities for young adults or which directly provides information to participants. Young adult programs may cover use of the library, library services, or library tours. Young adult programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of programs include book clubs and summer reading events.

Count all young adult programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include young adult programs sponsored by other groups that use library facilities. If young adult programs are offered as a series, count each program in the series. For example, a book club offered every two weeks, 24 weeks a year, should be counted as 24 programs. Exclude library activities for young adults delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.

Note: Young Adult age is defined as 12 through 18 years and includes 18- year-olds. The Young Adult Library Services Association (YALSA) defines young adults as age 12 through 18.

### Total # of All Live Young Adult Programs

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### # of Live, **In-person** Young Adult Programs

A YA program where library staff (or other party sponsored by the library) and participants are physically located in the same location at the same time during the program.

### # of Live, **Virtual** Young Adult Programs

A YA library program conducted via a Web conferencing or Webinar platform such as Facebook, YouTube, or Zoom, during which a library staff member (or other party sponsored by the library) is presenting to or interacting with an audience in real-time.

### Total attendance at Young Adult Programs

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### Attendance at Live, **In-person** Young Adult Programs

Count all people who attend YA programs regardless of age. Participants and library staff (or other party sponsored by library) are physically located in same location during the program.

### Attendance at Live, **Virtual** Young Adult Programs

Regardless of the number of formats in which a program session is offered, each attendee or view should only be counted once. Count each participant device connected to a virtual program as a single attendee. For program sessions hosted on Facebook Live, YouTube Live, or similar platforms, count peak concurrent viewers. For those hosted on videoconferencing platforms, count the maximum number of non-staff participants during the session.

## Adult Programming

An adult program session is any planned event for which the primary audience is adults age 19 or older. Examples of these types of program sessions include, but are not limited to, book discussions, citizenship classes, and lectures. Each program session should only be counted in one age category based on its primary target audience.

### Total # of Adult Programs

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### # of Live, **In-person** Adult Programs

An adult program where library staff (or other party sponsored by the library) and participants are physically located in the same location at the same time during the program.

### # of Live, **Virtual** Adult Programs

An adult library program conducted via a Web conferencing or Webinar platform such as Facebook, YouTube, or Zoom, during which a library staff member (or other party sponsored by the library) is presenting to or interacting with an audience in real-time.

### Total attendance at All Adult Programs

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### Attendance at Live, **In-person** Adult Programs

Count all people who attend adult programs regardless of age. Participants and library staff (or other party sponsored by library) are physically located in same location during the program.

### Attendance at Live, **Virtual** Adult Programs

Regardless of the number of formats in which a program session is offered, each attendee or view should only be counted once. Count each participant device connected to a virtual program as a single attendee. For program sessions hosted on Facebook Live, YouTube Live, or similar platforms, count peak concurrent viewers. For those hosted on videoconferencing platforms, count the maximum number of non-staff participants during the session.

## General Interest Programming

A general interest program session is any planned event that is appropriate for any age group or multiple age groups. Include all-age, all-library, family, and intergenerational program sessions. Examples of these types of program sessions include, but are not limited to, family game nights, holiday events, storytelling programs, or chess clubs. Include all programs here that do not fit into the other age category elements.

Each program session should only be counted in one age category based on its primary target audience; do not include program sessions here that have already been counted in earlier age category elements. Avoid including program sessions that are targeted at more than one non-adult age category (and are not targeted at adults); these should be counted in the child or young adult age category that best represents the target audience.

### Total # of General Interest Programs

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### # of Live, **In-person** programs for a general audience

Any general interest program where library staff (or other party sponsored by the library) and participants are physically located in the same location at the same time during the program.

### # of Live, **Virtual** programs for a general audience

A library program for general audiences conducted via a Web conferencing or Webinar platform such as Facebook, YouTube, or Zoom, during which a library staff member (or other party sponsored by the library) is presenting to or interacting with an audience in real-time.

### Total attendance at All General Interest Programs

If you are not separating live and virtual programs, report total number here. Automatically calculated if you choose to report separate In-person and virtual programming.

### Attendance at Live, **In-person** General Interest Programs

Count all people who attend general interest programs regardless of age. Participants and library staff (or other party sponsored by library) are physically located in same location during the program.

### Attendance at Live, **Virtual** General Interest Programs

Regardless of the number of formats in which a program session is offered, each attendee or view should only be counted once. Count each participant device connected to a virtual program as a single attendee. For program sessions hosted on Facebook Live, YouTube Live, or similar platforms, count peak concurrent viewers. For those hosted on videoconferencing platforms, count the maximum number of non-staff participants during the session.

## Off-Site Programming

An offsite program is any program sponsored or co-sponsored by the library that takes place outside a library facility (including bookmobiles) or off library grounds regardless of primary target audience. This would include visits by library staff or volunteers to a school, adult center, etc., or programs provided via pop-up mobile units.

NOTE: These programs should also be included in responses for above age- related programming/attendance. (Answer the question “Of the live, in-person programs and attendance that I reported in the categories above, how many were off-site?”)

### Number of Off-Site Programs

Of the programs listed above, report those programs held off-site that are sponsored or co-sponsored by the library. Do not include programs sponsored by other groups that use library facilities/resources. If programs are offered as a series, count each program in the series. For example, a film series offered once a week for eight weeks should be counted as eight programs.

### Off-Site Program Attendance

The actual count of attendance at off-site programs over the course of adults, young adults and children, at programs which have been sponsored or co-sponsored by the library that takes place outside a library facility (including bookmobiles) or off library grounds regardless of primary target audience.

## Recorded Programming

### Total recordings of program content

A recording of program content is a video or audio recording of content that meets the definition of a program except that it is not streamed live.

Only include program presentations posted during the reporting period. Regardless of the number of platforms on which a presentation is posted, count each unique presentation only once. Include program sessions hosted on Facebook Premiere that are not facilitated by a staff member. Count asynchronous (not viewed live) program presentations at the administrative entity level; do not duplicate numbers at each branch. Include recordings of synchronous (live) program sessions that were available for viewing after later (after the session ended).

### Total views of recorded program content

Count of views of previously-recorded program presentations for a period of seven (7) days after the presentation was posted, even if that period extends beyond the survey reporting period (or fiscal year). For program presentations made available via Facebook, count unique 1-minute views of each video. For those made available via other platforms, count unique views of each video.

### Total on-demand views of live virtual programs

For live-streamed events made available for later viewing, count total on-demand views for a period of seven (7) days after the presentation was posted, even if that period extends beyond the survey reporting period (or fiscal year).

Do not include views of the live broadcast (these should be reported as attendance at live, virtual programs above.

NOTE: For events made available via Facebook, report 1 minute views. For other platforms, report unique views.

## Electronic Services

### CIPA Compliant

Is your library compliant with CIPA (Children's Internet Protection Act)?

NOTE: For CIPA compliance your library must have an Internet safety policy that includes technology protection measures and provide a means to block images that constitute obscenity, child pornography and prevent minors from obtaining access to material that is harmful to them. All library computers, including staff computers, must have a technology protection measure installed and running that blocks obscene/child pornography images. An authorized person may disable the blocking or filtering measure during use by an adult to enable access for bona fide research or other lawful purposes. The library must have an internet safety policy adopted by the board at a public meeting.

### Number of Uses (Sessions) of Public Internet Computers Per Year

Report the total number of uses (sessions) of the library's Internet computers in the library during the last year. If the computer is used for multiple purposes (Internet access, word-processing, OPAC, etc.) and Internet uses (sessions) cannot be isolated, report all usage. A typical week or other reliable estimate may be used to determine the annual number. Sign-up forms or Web-log tracking software also may provide a reliable count of uses (sessions).

Note: This count includes only the library's Internet computers. Do not include WiFi access using non-library computers. The number of uses (sessions) may be counted manually, using registration logs. Count each use (session) for public internet computers, regardless of the amount of time spent on the computer. A use (session) on the library's public internet computer(s) three times a year would count as three uses (sessions). Software such as “Historian” can also be used to track the number of uses (sessions) at each public internet computer. If the data element is collected as a weekly figure, multiply that figure by 52 to annualize it.

### Reporting Method for Uses of Internet Computers Per Year

Regarding the Number of Uses (Sessions) of Public Internet Computers per Year (data element 651) entered, is this an annual count or an annual estimate based on a typical week or weeks?

Select one of the following:

CT—Annual Count

ES—Annual Estimate Based on Typical Week(s)

### Website visits

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. Usage of library social media accounts (e.g., Facebook, Twitter, etc.) should not be reported here. A visit is usually determined by each user's unique IP address, and/or their login account name when they are accessing secure parts of the website. The details for website visits/sessions are contained within the access log file for the web server(s) and may be accessible using log file analysis or web analytics reporting tools.

Virtual visits include a user's request of the library website or catalog from outside the library. A single visit to a website may involve loading of numerous web pages or gratuitous elements (images, style sheets, etc.) If you are unable to report this number, check the box “Unavailable” (to the right of the data entry field) and a “-1” will be automatically entered.

### Wireless Sessions per year

Report the number of wireless sessions provided by the library wireless service annually. If you are unable to report this number, check the box “Unavailable” (to the right of the data entry field) and a “-1” will be automatically entered.

### Reporting Method for Wireless Sessions

Regarding the number of Wireless Sessions (data element 652) entered, is this an annual count or an annual estimate based on a typical week or weeks of hardware logging or network scanning?

Select one of the following:

CT—Annual Count

ES—Annual Estimate Based on Typical Week(s)

### Number of Internet Terminals

This is an automatic sum of the number of terminals entered for each bookmobile and outlet in sections 9 and 10.

## Self-Directed Activities

Activities provided for patrons without the expectation of staff interaction while the activity is being completed. Craft bags for children to take home, social media challenges, and story-walks are all examples

### Number of Self-directed Activities

Count each activity that is offered once. For example, a jewelry making kit should be counted once, even if there are 20 copies of it.

### Number of participants

Approximately how many patrons took part? It is understood that this is a difficult number to capture, as staff are not present. Entering “-1” (unavailable) is acceptable.

### Description of activities

Open-text: describe or list activities offered