

# **Maine State Library**

## **Public Library Annual Report**



## **FY23 Instructions and Data Definitions**

Data collected from the Maine Public Library Annual Report is reported to the Institute of Museum and Library Services (IMLS) as part of the national Public Libraries Survey (PLS).

The Public Libraries Survey is a national census of public library systems. It is conducted annually by the IMLS in partnership with State Library Agencies and the Library Statistics Working Group, with the American Institutes for Research as the data collection agent. Its data elements cover library service measures of public library services, resources, and funding. An annual report is collected from over 9,000 active public libraries in the United States.

## Introduction

The data that is collected on the Public Library Annual Report are used to compile the Maine Annual Statistical Tables and the Public Library Directory. The data conforms to the national data format with data points and definitions created by State Data Coordinators in cooperation with IMLS and the Library Statistics Working Group.

This is a federally funded program coordinated by the Institute of Museum and Library Services (IMLS) and conducted on an annual basis to collect and publish accurate, consistent, and comparable public library statistics from each state. IMLS collects these data under the mandate in the Museum and Library Services Act of 2018 (PL 115-410), as stated in section 210. The data is intended for use on the local, state, and federal levels.

## Timeline

January 2, 2024	Survey opens in LibPAS
April 1, 2024	Survey must be locked (submitted) in LibPAS by 5:00 p.m.
April – June	Annual Reports are reviewed and verified by the State Data Coordinator. Libraries may be asked to provide further information or verify data.
June – July	Data is submitted to IMLS. Libraries may again be asked to provide further information or to verify data.
August - September	Salary data is posted on the MSL website.
September – November	Final data is certified by American Institutes for Research; the data collection agent for IMLS. Data is released and posted on MSL website.
December	Letters for upcoming Public Library Annual Report are mailed out.

## Tips for Completing the Annual Report

- It is important to read the **data definitions** below. These definitions will help you in determining what information is being asked for, how to answer accurately, and ensure all libraries are interpreting the questions the same way. The definitions are also available in LibPAS by clicking on the item number that appears before each data element.
- Please fill out all sections of the report as accurately and completely as possible. **All questions** on the report must be supplied with an answer or the report will not be accepted.
- Review all prefilled fields and make any necessary changes by clicking inside the box.

- **Use N/A** only if a question is not applicable or the answer is not available. Reporting N/A means that you do have data, but you do not collect the data or do not have access to it.
- **Report zero** only when the data is normally counted but there was no activity to report for that data element. For example, if no teen programs were held this year, report “0”.
- You must supply **notes to any edit checks** you receive before you can submit your report. Use the **Verify button** to see which ones require data or an explanation. Click on the **note icon** next to the data input box to provide an explanation.
- The report is not recognized as being complete until it is **submitted**. Click the **Submit/Lock** button in the upper right-hand quadrant of the screen to submit the report.

## Understanding Edit Checks

Respondents may generate an Edit Check following direct data entry which can be viewed on screen and used to:

- identify and correct any errors
- confirm the accuracy of data that generated edit warnings but did not require changes

Four types of edit checks are performed when data is entered:

- 1. Relational edit checks.** This is a data consistency check between related data elements. For example, an edit message is generated if the number of ALA-MLS Librarians is greater than “Total Librarians.”
- 2. Out-of-range edit checks.** This is a range check that compares the data reported for an item to the “acceptable range” of numeric values for the item. For example, an edit message is generated if average Public Service Hours per outlet per week is less than 11 or greater than 130 or if the ratio of the current year to the past year in Children’s Circulation is between 30.0 percent and 344.0 percent.
- 3. Arithmetic edit checks.** This is an arithmetical accuracy check of a reported total and its parts to the generated total. For example, an edit message is generated if Total Operating Revenue is not equal to the sum of its parts (Local Government Revenue, State Government Revenue, Federal Government Revenue, and Other Revenue).
- 4. Blank, zero, or invalid data edit checks.** This is a check of the reported data against acceptable values. For example, an edit message is generated if the Reporting Period Start Date is missing, if Print Materials is 0, or if the Zip Code is not valid.

## Resolving Edit Checks

All edit checks must be resolved before your report can be submitted. Resolving an edit check can be done two ways:

- Correcting any errors by making changes to the data
- Provide an explanation by clicking on the **note icon** to the left of the data input box

## Training Resources and Worksheets

All data is to be reported online through [LibPAS](#). A video overview of how to input data into LibPAS if available on the home page after logging in <http://www.screencast.com/t/0pRvnMU9h> (15-minute video)

Worksheets and resources on how to properly track and report data can be found at the Maine State Library website at <https://www.maine.gov/msl/libs/statistics/annual/index.shtml>

## Accessing and Using Public Library Data

Maine public libraries have access to current and prior years of data in the LibPAS reporting module and on the MSL website. Several types of reports are available including trend and comparison reports. The report module also includes access to downloadable template pamphlets and infographics. All downloads open in Microsoft Excel or Word and are fully customizable.

A guide to creating custom reports in LibPAS: <https://www.maine.gov/msl/libs/data/LibPASReportsGuide.docx>

## Federal Data Products

The Institute of Museum and Library Services (IMLS) aggregates and disseminates data from the Public Library Annual Report. Several tools are available to encourage use of the PLAR data in their PLS Data Catalog.

The [PLS Data Catalog](#) includes:

- **Library Search & Compare** – This web-based tool provides an easy way to query, browse, view, and download data about individual libraries from the Public Libraries Survey.
- **Data Files** – Conducted annually since 1988, PLS is your definitive source on the state of public libraries in the United States. Explore the PLS data to find key information on over 9,000 public library systems and 17,000 public library outlets nationwide.
- **Benchmarking Tables** – These sortable tables showcase 3 years' worth of key indicators of public library use, financial health, staffing and resources at the national, state, and library service area levels.
- **Special Reports and Briefs** – Various topical reports and briefs are available to view and download.

## Other Data and Information Sources

Census		<a href="https://www.census.gov/">https://www.census.gov/</a>
	Current population and housing estimates	<a href="https://www.census.gov/programs-surveys/popest.html">https://www.census.gov/programs-surveys/popest.html</a>
	Social, economic, housing, and demographic	<a href="https://www.census.gov/acs/www/data/data-tables-and-tools/narrative-profiles/">https://www.census.gov/acs/www/data/data-tables-and-tools/narrative-profiles/</a>

	estimates for a selected geographic area	
<b>Maine Revenue Service</b>	Current valuation for each municipality and unorganized place	<a href="https://www.maine.gov/revenue/taxes/property-tax/state-valuation">https://www.maine.gov/revenue/taxes/property-tax/state-valuation</a>
<b>State Economist</b>	Demographic projections, Census data and data visualization tool	<a href="https://www.maine.gov/dafs/economist/home">https://www.maine.gov/dafs/economist/home</a>
<b>Comprehensive Plan</b>	Blueprint for a community that looks at various aspects of community life and how they may interact with town government	Check your town website for a copy of the most recent comprehensive plan

## Data Definitions

### Section 1: Identification

#### 1.1 Library Name

This is the legal name of the administrative entity.

#### 1.4 FSCS ID

This is the identification code assigned by WebPlus to the administrative entity.

#### 1.6 Number of Central Libraries

This is one type of single outlet library (SO) or the library, which is the operational center of a multiple-outlet library (MO or MA). Usually, all processing is centralized here, and the principal collections are housed here. Synonymous with main library.

#### 1.6 Number of Branch Libraries

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

1. Separate quarters;
2. An organized collection of library materials;
3. Paid staff; and
4. Regularly scheduled hours for being open to the public.

#### 1.7 Number of Bookmobiles

A bookmobile is a traveling branch library. It consists of at least ALL of the following:

1. A truck or van that carries an organized collection of library materials;
2. Paid staff; and
3. Regularly scheduled hours (bookmobile stops) for being open to the public.

Note: Count the number of vehicles in use, not the number of stops the vehicle makes.

#### 1.8 Population of Legal Service Area

The number of people in the geographic area for which a public library has been established to offer services and from which (or on behalf of which) the library derives revenue, plus any areas served under contract for

which the library is the primary service provider. This number is provided by the State Data Coordinator (SDC).

**Note:** The LSA is prefilled with the prior year's numbers. The current LSA population estimate will be filled in by the SDC after the close of the reporting period. The legal service area is calculated from the latest population estimates provided by the U.S. Census Bureau.

### 1.11 Street Address

This is the complete street address of the administrative entity. Do not report post office box or general delivery.

**IMPORTANT:** For sections 2-8 please provide answers for the current reporting year.

## Section 2: Hours/Facility/Staff

### 2.1 Total Weeks Open per Year

This is the number of weeks during the year that an outlet was open to the public.

**Note:** Include the number of weeks open for public service for centrals, branches, bookmobiles, and books-by-mail only. Minor variations in public service hours need not be included. The count should be based on the number of weeks that a library outlet was open for half or more of its scheduled service hours. Extensive weeks closed to the public due to natural disasters or other events should be excluded from the count. Do not calculate based on total number of service hours per year at the outlet level. For example, by dividing total hours by the average hours open per week. Round to the nearest whole number of weeks. If the library was open half or more of its scheduled hours in a given week, round up to the next week. If the library was open less than half of its scheduled hours, round down.

### 2.3 Public Service Hours Per Year

This is the number of annual public service hours the library is open to the public.

### 2.4 Square Footage in Existing Building

Provide the area, in square feet, of the public library. This is the area on all floors enclosed by the outer walls of the library. Include all areas occupied by the library, including those areas off-limits to the public. Include any areas shared with another agency or agencies if the outlet has use of that area.

**NOTE:** It is important for this information to be accurately reported and updated when there has been changes to the building footprint. If you are not sure of your square footage you should call your town office to obtain this information.

### 2.5 – 2.8 Paid Staff Full Time Equivalent

Questions 2.5-2.7 must be reported as full time equivalent. 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. Do not include substitute staff. To ensure comparable data, 40 hours per week has been set as the measure of full-time employment (FTE). To compute full-time equivalents (FTE) for each staff category, divide the total number of hours worked by all employees in a category per week by 40.

For example, 60 hours per week of part time work by employees in a staff category divided by 40 equals 1.5 FTEs.

### **2.5 Total Number of Paid Librarians with an ALA - MLS**

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

### **2.6 Total Paid 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 – MLS (Data element #2.6).

**NOTE:** This is any person holding the title of Librarian, Director, Administrator or Head Librarian. **Do not include substitute workers.**

### **2.7 All Other Paid Staff**

This includes all other FTE support staff paid from the reporting unit budget, including library assistant, page, bookkeeper, plant operations, security, and maintenance staff. **Do not include substitute workers.**

### **2.8 Total Paid Employees**

This is the sum of total librarians and all other paid staff.

### **2.9 Total Number of All Paid Employees**

This is the number of actual people (not FTE) who are paid employees. **Do not include substitute workers.**

## **Section 3: Financial Reporting**

### **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.

Operating revenue and expenditures are funds and costs necessary to support the provision of library services. Capital revenue and expenditures are not part of the "regular" library budget or day-to-day operating costs to run the library. Be sure to check related definitions in this section for detailed explanations and examples.

### **3.1 Municipal Appropriation**

This includes local government funds designated by the community where the library resides 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, fines, or fees.

### **3.3 Total Local Government Revenue**

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.

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.).

### **3.4 State Government Revenue**

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.

**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).

### **3.5 Federal Government Revenue**

This includes all federal government funds distributed to public libraries for expenditure by the public libraries, including federal money distributed by the state.

### **3.6 Other Revenue**

This is all operating revenue other than that reported under local, state, and federal. Include, for example, monetary gifts and donations received in the current year, interest, library fines, fees for library services, or grants. Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donations.

### **3.7 Total Operating Revenue**

This is the sum of local government revenue, state government revenue, federal government revenue, and other operating revenue.

### **3.8 Does the library have an endowment?**

An endowment is a sum of money that is permanently invested in equities (stocks) and fixed income (bonds and CD's, etc.) in order to increase the size of the endowment every year. The organization spends only a certain percentage of the fund each year but typically would not spend any of the initial principle which is being invested. The spending would typically be from the appreciation from investment gains.

### **3.9 Did the library engage in active fundraising to supplement the operating revenue?**

Did the library engage in active fundraising to supplement the operating revenue? This includes book sales, bake sales, raffles, silent auctions, annual appeal, and other activities that involve generating financial support for the operations of the library.

### **3.10 What percentage of operating revenue was derived from fundraising during the reporting year.**

Report the percentage of operating revenue that came from fundraising during the reporting year. To get the percentage, divide the amount of money received through fundraising by the Total Operating Revenue.



## **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.

### **3.11 Salaries & Wages Expenditures**

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. Include salaries paid directly by the municipality.

### **3.12 Employee Benefits Expenditures**

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, workmen's compensation, tuition, and housing benefits. Include benefits paid directly by the municipality.

### **3.13 Total Staff Expenditures**

This is the sum of salaries and wages and employee benefits. Include salaries and benefits paid directly by the municipality.

### **3.14 Print Materials Expenditures**

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

### **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.

### **3.15 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 3.18 Other Operating Expenditures.

Include membership fees to Maine InfoNet Download Library here.

### **3.16 Other Materials Expenditures**

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

### **3.17 Total Collection Expenditures**

This is the sum of all expenditures for print materials, electronic materials, and other materials. Collections include all operating expenditures from the library budget for 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.

### **3.18 Other Operating Expenditures**

This includes all expenditures other than those for staff and collection.

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.

### **3.19 Total Operating Expenditures**

This is the sum of total staff expenditures, total collection expenditures, and other operating expenditures.

## **CAPITAL**

Capital is separate from regular operating revenue and expenditures of the library. These are revenues and/or expenditures not part of the "regular" library budget or day-to-day operating costs to run the library. 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.

### **3.20 Local Government Capital Revenue**

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.

### **3.21 State Government Capital Revenue**

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.

### **3.22 Federal Government Capital Revenue**

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.

### 3.23 Other Capital Revenue

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

### 3.24 Total Capital Revenue

This is the sum of Local Government Capital Revenue, State Government Capital Revenue, Federal Government Capital Revenue, and Other Capital Revenue. Note: The amounts reported for Total Capital Revenue and Total Capital Expenditures are not expected to be equal.

### 3.25 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 onetime 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 4: Services

### SYNCHRONOUS PROGRAMS

Synchronous programs are live library sponsored programs that are held in-person onsite, in-person offsite, or virtually. A synchronous (live) program is any planned event which introduces the group attending to library services or which provides information to participants.

Program sessions may cover the use of the library, library services, or library tours. Program sessions may also provide cultural, recreational, or educational information. Examples of these types of program sessions include, but are not limited to, film showings, lectures, story hours, literacy programs, citizenship classes, and book discussions.

Regardless of the number of formats in which a program is offered, each program should only be counted once and in one format category. Include in-person programs that also have a virtual attendance option and count them as a single program session.

#### Include

- All programs that are sponsored or co-sponsored by the library. For a program to be sponsored or co-sponsored by the library, the library must contribute financial resources or staff time toward the program. For a program that is part of a larger community event (such as a farmer's market or festival), it is not necessary for the library to also sponsor or organize the larger event.
- Both on-site and off-site programs. For example, include a storytime at a farmer's market or a presentation

<p>to a school group about library resources conducted at a school.</p> <ul style="list-style-type: none"> <li>• Live-streamed virtual (synchronous) programs that are sponsored or co-sponsored by the library.</li> <li>• Programs with attendance of zero or one if they were intended for a group.</li> </ul>
<p><b>Exclude</b></p> <ul style="list-style-type: none"> <li>• Programs sponsored by other groups that use library facilities. For example, do not include a homeschooling group hosting a speaker in a meeting room without facilitation from library staff.</li> <li>• Offsite outreach efforts that do not otherwise meet the definition of a program. For example, do not include having a library card signup booth at a farmer's market.</li> <li>• Recorded (asynchronous) presentations of program content; these should be counted in Total Number of Asynchronous Program Presentations (data element 4.8 rpp)</li> <li>• Programming that is shared on the library's website or social media that is not sponsored or co-sponsored by the library. For example, do not include sharing a video from another author's website of him or her reading a book.</li> <li>• Activities 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.</li> <li>• Passive or self-directed activities that do not occur at a scheduled time. For example, do not include leaving an art project or puzzle on a table for participants to complete.</li> </ul>

**It is important to note that the totals in 4.0/4.0a and 4.11/4.11a should be the same. This section takes all programs offered during the reporting year and breaks them down by target age, in-person, virtual, off-site, and onsite programs.**

#### **4.0 Synchronous (Live) Programs by Target Age**

##### **Number of Synchronous (Live) Programs Targeted at Children Ages 0-5**

A program 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 programs include, but are not limited to, story hours, every child ready to read programs, musical or sing-along events, and puppet shows. Include programs aimed at children ages 0-5 even if adult caregivers also attend. Each program should only be counted in one age category based on its primary target audience. This figure is a subset of the Total Number of Synchronous (Live) Programs (data element 4.7). See Synchronous Program definition above for more information about counting programs.

##### **Number of Synchronous (Live) Programs Targeted at Children Ages 6-11**

A program 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 programs include, but are not limited to, story hours, science events, crafting classes, and summer reading events. Include programs aimed at children ages 6-11 even if adult caregivers also attend with the children. Each program should only be counted in one age category based on its primary target audience.

##### **Number of Synchronous (Live) Programs Targeted at Young Adults Ages 12-18**

A young adult program is any planned event for which the primary audience is young adults ages 12 to 18 years. Examples of these types of programs include, but are not limited to, book clubs, college prep programs, teen tech or gaming clubs, and summer reading events. Each program should only be counted in one age category based on its primary target audience. This figure is a subset of the Total Number of Synchronous Programs (data element 4.7). See Synchronous Programs definition for more information about counting program sessions. Note: The Young Adult Services Association (YALSA) defines young adults as age 12 through 18.

### **Number of Synchronous (Live) Programs Targeted at Adults Age 19 or older**

An adult program is any planned event for which the primary audience is adults age 19 or older. Examples of these types of programs include, but are not limited to, book discussions, citizenship classes, and lectures. Each program should only be counted in one age category based on its primary target audience. This figure is a subset of the Total Number of Synchronous Program Sessions (data element 4.7). See Synchronous Program Session definition for more information about counting programs.

### **Total Synchronous (Live) Programs**

This field will auto-calculate for you. This is a total count of the number of synchronous (live) programs during the reporting period. See the Synchronous Program definition for more detail about what counts as a program.

### **Number of Synchronous (Live) Programs General Interest programs (All Ages)**

A general interest program is any planned event that is appropriate for any age group or multiple age groups. Include all-age, all-library, family, and intergenerational programs. Examples of these types of programs 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 should only be counted in one age category based on its primary target audience; do not include programs here that have already been counted in earlier age category elements. Avoid including programs 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. This figure is a subset of the Total Number of Synchronous Programs. See Synchronous (Live) Programs definition for more information about counting programs.

### **4.0a Synchronous (Live) Program Attendance by Target Age**

#### **Attendance at Synchronous (Live) Programs Targeted at Children Ages 0-5**

The count of the audience at all programs for which the primary audience is children ages 0 to 5 years. Please count all attendees of these programs regardless of age.

#### **Attendance at Synchronous (Live) Programs Targeted at Children Ages 6-11**

The count of the audience at all programs for which the primary audience is children ages 6 to 11 years. Please count all attendees of these programs regardless of age.

#### **Attendance at Synchronous (Live) Programs Targeted at Young Adults Ages 12-18**

The count of the audience at all programs for which the primary audience is young adults ages 12 to 18 years. Please count all attendees of these programs regardless of age. This figure is a subset of the Total Attendance at Synchronous Programs (data element 4.8). See Total Attendance at Synchronous Programs for more information about counting program attendance.

#### **Attendance at Synchronous (Live) Programs Targeted at Adults Age 19 or Older**

The count of the audience at all programs for which the primary audience is adults age 19 or older. Please count all attendees of these programs regardless of age. This figure is a subset of the Total Attendance at Synchronous Programs (data element 4.8). See Total Attendance at Synchronous Programs for more information about counting program attendance.

#### **Attendance at Synchronous (Live) General Interest programs (All Ages)**

The count of the audience at programs that are appropriate for any age group or multiple age groups. Please

count all attendees of these programs regardless of age. This figure is a subset of the Total Attendance at Synchronous Programs (data element 4.8). See Total Attendance at Synchronous Programs for more information about counting program attendance.

### **Total Attendance at Synchronous (Live) Programs**

This field will auto-calculate for you. This is a total count of the audience at all programs during the reporting period. This includes See the Synchronous Programs definition for more detail about what counts as a program.

**4.11 Synchronous (Live) Program Totals** Note: These numbers are also included in programs by target age (4.0)

### **Total Number of Synchronous (Live) In-Person Onsite Programs**

An in-person onsite program is any planned event that includes an in-person attendance option and takes place at library facilities. Examples include, but are not limited to, a job skills class in the library or a nature program on the library grounds. Regardless of the number of formats in which a program is offered, each program should only be counted once and in one format category. Include in-person programs that also have a virtual attendance option and count them as a single program session. This figure is a subset of the Total Number of Synchronous (Live) Programs (data element 4.7). See Synchronous Programs definition for more information about counting programs.

### **Total Number of Synchronous (Live) In-Person Offsite Programs**

An in-person offsite program is any planned event that includes an in-person attendance option and takes place somewhere other than the library or the library grounds. Examples include, but are not limited to, facilitating a book club at a local nursing home, hosting a storytime at a local farmer's market, or visiting a school to present about library services. Regardless of the number of formats in which a program is offered, each program should only be counted once and in one format category. Include in-person programs that also have a virtual attendance option and count them as a single program. This figure is a subset of the Total Number of Programs (data element 4.7). See Synchronous Programs definition for more information about counting program sessions.

### **Total Number of Synchronous (Live) Virtual Programs**

A synchronous (live) virtual program is any planned event that is streamed virtually and can be viewed live as it progresses (i.e., live streaming). Regardless of the number of formats in which a program session is offered, each program should only be counted once and in one format category. Include virtual programs that are also recorded. Include programs hosted on Facebook Premiere that are facilitated by a staff member. Count virtual programs at the administrative entity level; do not duplicate numbers at each branch. Exclude programs that also have an in-person component; these should be counted under Total Number of Synchronous (Live) In-Person Onsite Programs or Total Number of Synchronous (Live) In-Person Offsite Programs (data elements 4.11 or 4.12). This figure is a subset of the Total Number of Synchronous (Live) Programs (data element 4.7). See Synchronous Program Session definition for more information about counting program sessions.

**4.11a Synchronous (Live) Program Attendance Totals** Note: These numbers are also included in program attendance by target age (4.0a)

### **Total Synchronous (Live) In-Person Onsite Program Attendance**

The count of in-person attendance at programs that take place at library facilities. Regardless of the number of formats in which a program is offered, each attendee should only be counted once. Each attendee should be counted in the format category in which they attended the program. For in-person onsite programs that also have a virtual component, exclude virtual attendance; this should be counted under Synchronous Virtual



Program Attendance (data element 4.7vp). This figure is a subset of the Total Attendance at Synchronous Programs (data element 4.8). See Total Attendance at Synchronous Programs for more information about counting program attendance.

#### **Total Synchronous (Live) In-Person Offsite Program Attendance**

The count of in-person attendance at programs that take place somewhere other than the library. Regardless of the number of formats in which a program is offered, each attendee should only be counted once. Each attendee should be counted in the format category in which they attended the program session. For in-person offsite programs that also have a virtual component, exclude virtual attendance; this should be counted under Synchronous Virtual Program Attendance (data element 4.8va). This figure is a subset of the Total Attendance at Synchronous Programs (data element 4.8). See Total Attendance at Synchronous Programs for more information about counting program attendance.

#### **Total Synchronous (Live) Virtual Programs Attendance**

The count of live attendance at virtual programs. Regardless of the number of formats in which a program is offered, each attendee or view should only be counted once. Each attendee should be counted in the format category in which they attended or viewed the program. Count each participant device connected to a virtual program as a single attendee. For programs 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 program. For virtual programs that are also recorded for later, on-demand, asynchronous viewing, exclude views that occur after the session has ended; these should be counted under Total Views of Asynchronous (Pre-Recorded) Programs (data element 4.8rpv). For programs that also have an in-person component, exclude in-person attendance; this should be counted under Synchronous (Live) In-Person Onsite Program Attendance or Synchronous (Live) In-Person Offsite Program Attendance (data elements 4.11a or 4.12a). This figure is a subset of the Total Attendance at Synchronous (Live) Programs (data element 4.8). See Total Attendance at Synchronous (Live) Programs above for more information about counting program attendance.

#### **ASYNCHRONOUS (Pre-Recorded) PROGRAMS**

Asynchronous programs are offered for viewing as a pre-recorded or on-demand program. An Asynchronous program presentation is any recording of program content that cannot be viewed live as it unfolds (i.e., on-demand streaming). Only include program presentations posted during the reporting period.

The count of views of asynchronous (pre-recorded) program presentations for a period of thirty (30) 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. Do not include Synchronous (Live) Programs or Attendance.

#### **4.8rpp Total Asynchronous (Pre-Recorded/On-Demand) Program Presentations**

Enter the total number of programs produced, pre-recorded, and posted online by the library for watching at any time. These programs are offered as a pre-recorded and on-demand program.

An asynchronous program presentation is any recording of program content that cannot be viewed live as it unfolds (i.e., on-demand streaming). 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 program presentations at the administrative entity level; do not duplicate numbers at each branch. Include recordings of synchronous program sessions that were available for asynchronous viewing after the session ended.

#### **4.8rpv Total Views of Asynchronous (Pre-Recorded) Program Presentations within 30 Days**

Enter the total number of views of programs produced, pre-recorded, and posted online by the library for watching at any time.

The count of views of asynchronous (pre-recorded) program presentations for a **period of thirty (30) 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. For program presentations that are recordings of synchronous (live) virtual program sessions, exclude synchronous (live) attendance; these should be counted under Synchronous (Live) In-Person Onsite Program Attendance, Synchronous (Live) In-Person Offsite Program Attendance, or Synchronous (Live) Virtual Program Attendance (data elements 4.11a, 4.12a, or 4.8a).

### **Other Library Services**

#### **4.14 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).

#### **4.14a Library Visits Reporting Method**

Regarding the number of Library Visits (4.14) entered, is this an annual count or an estimate based on a typical week or weeks?

#### **4.14b Total Number of Curbside Visits**

If your library offered curbside or pick-up service this year, report the total number of no-contact or limited contact curbside/pick-up visits to the library. **Example:** James and his three children drive to the library for curbside service. They pick up 12 books. What counts? Curbside visit = 1 and circulation of physical materials = 12

#### **4.15 Reference Transactions**

There are three elements required for a reference transaction:

1. **Patron with an information need**
2. **Library staff member**
3. **A tool or information source**

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



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

1. A reference transaction includes information and referral service, unscheduled individual instruction, and assistance in using information sources (including websites and computer-assisted instruction).
2. Count Readers' Advisory questions as reference transactions.
3. Information sources include (a) printed and non-printed 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.
4. 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.
5. If a contact includes both reference and directional services, it should be reported as one reference transaction.
6. Duration should not be an element in determining whether a transaction is a reference transaction.
7. 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 the rest room? Where are the 600s?

#### 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.

#### **4.15a Reference Transactions Reporting Method**

Regarding the number of Reference Transactions (4.15) entered, is this an annual count or an estimate based on a typical week or weeks?

#### **4.16 Interlibrary Loans (ILL) Received from Another Autonomous Library**

These are library materials, or copies of the materials, received by one autonomous library from another upon request. The libraries involved in interlibrary loans are not under the same library administration. These data are reported as annual figures. Add this figure to your circulation if it is not already.

#### **4.17 Interlibrary Loans (ILL) Provided to Another Autonomous Library**

These are library materials, or copies of the materials, provided by one autonomous library to another upon request. The libraries involved in interlibrary loans are not under the same library administration. These data are reported as annual figures.

#### **4.19 Number of uses by outside groups or organizations of library rooms or spaces for non-library events**

Report the total number of times your meeting room or space was used for non-library sponsored events.

Example: A local civic group uses the meeting room twice a month. This is reported as 24 uses.

#### **4.20 Total Number of Take & Make Kits Handed Out**

Report the total number of Take & Make Kits that were handed out during the reporting year. Take & Make Kits are craft or activity kits for any age group, provided as a hands-on activity intended to be done outside the library.

## **Section 5: 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 Material 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.

### **5.1, 5.2, 5.3 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.

### **5.4 Electronic Books (E-Books)**

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 e-book 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.

Do not include public domain/uncopyrighted e-books that have unlimited access (e.g., Project Gutenberg).

**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”.

**NOTE:** Maine InfoNet offers libraries the opportunity to provide their patrons access to downloadable eBooks through CloudLibrary for an annual membership fee. If you are a member you will need to add this number to the total.

## **5.5 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 physical units, including duplicates. Items packaged together as a unit (e.g., two audiocassettes for one recorded book) and checked out as a unit is counted as one physical unit.

## **5.6 Audio–Downloadable Units**

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 held locally and remote 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.

Do not include public domain/uncopyrighted e-books that have unlimited access (e.g., Librivox).

**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”.

**NOTE:** Maine InfoNet offers libraries the opportunity to provide their patron’s access to downloadable Audiobooks through cloudLibrary for an annual membership fee. If you are a member you will need to add this number to the total.

## **5.7 Video Material-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 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 is counted as one physical unit.

## **5.8 Video Material – Downloadable Units**

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 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 is 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”.

### **5.9 Other Circulating Physical Items**

Report a single figure that includes the following: all circulating physical items other than print books (data element 5.1, 5.2, and 5.3), physical audio books (data element 5.5), physical video units (data element 5.7), and serials. These are materials in a fixed, physical format available for use outside the library.

**Examples:** These can include a variety of items such as museum passes, park passes, wifi hotspots, sewing machines, cake pans, tools, telescopes, board games, video games, sporting equipment, 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.

### **5.11 Total Physical Items in Collection**

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 (data element 5.3), Audio-physical units (data element 5.5) and Video - physical units (data element 5.7), and Other Circulating Physical Items (data element 5.9). 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.

### **Electronic Collections 5.12 -5.14**

Report the number of electronic collections (licensed databases). Examples of an Electronic Collection: Libby eMagazines, TumbleBooks, InstantFix, Hoopla music, Literature Resource Center, Safari Tech Books, etc.)

An electronic collection is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, text, photographs, music, video, etc.) with a common user interface and software for the retrieval and use of the data. An electronic collection (database) may be organized, curated, and electronically shared by the library, or rights may be provided by a third-party vendor. An electronic collection (database) may be funded by the library, or provided through cooperative agreement with other libraries, or through the State Library. Do not include electronic collections (database) 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 (databases) that are available online or are locally hosted in the library. **Note:** The data or records are usually collected with an intent and relate to a defined topic.

Report the number of electronic collections (databases) acquired through curation, payment, or formal agreement, by source of access:

**Digital Maine Library is counted in 5.12 Local/Other Cooperative Agreements and each electronic collection (database) is counted within Digital Maine Library. Any library which has public access to the Internet should be counting these databases.**

The number of Digital Maine Library databases has been prefilled for you. Any additional databases purchased or acquired by the library should be added to this number.

## Section 6: Circulation

### 6.1 Children/YA Circulation: Physical Materials

The total annual Children's/YA 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.

### 6.2 Children/YA Electronic Material Use: E-Books, Downloadable Audio and Video

The total annual use of all children's/YA eBooks, downloadable audiobooks, and downloadable videos to all users. It includes renewals. Electronic Materials are materials that are distributed digitally online 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 use.

Include use only for items that require user authentication and have a limited period of use. Download Library Members: Contact Maine InfoNet if you need help running circulation reports.

### 6.3 Total Children/YA Circulation

The total annual circulation of all children's library materials of all types, including renewals.

**NOTE:** Count all 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.**

### 6.4 Adult Circulation: Physical Materials

The total annual adult 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.

## 6.5 Adult Electronic Material Use: E-Books, Downloadable Audio and Video

The total annual use of all adult eBooks, downloadable audiobooks, and downloadable videos to all users. It includes renewals. Electronic Materials are materials that are distributed digitally online 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 use.

Include use only for items that require user authentication and have a limited period of use. Download Library Members: Contact Maine InfoNet if you need help running circulation reports.

## 6.6 Total Adult Circulation

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

**Note:** Count all 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.**

### 6.6a Circulation of Other Physical Items

Circulation of all physical items other than print books (data element 5.1, 5.2, and 5.3), physical audio books (data element 5.5), physical video units (data element 5.7), and serials, including renewals. These are materials in a fixed, physical format available for use outside the library.

**Examples:** These can include a variety of items such as museum passes, park passes, wi-fi hotspots, sewing machines, cake pans, tools, telescopes, board games, video games, sporting equipment, etc.

## 6.7 Successful Retrieval of Electronic Information (Databases)

This data element is designed to capture the use of online content that requires user authentication but does not have a traditional circulation period.

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]

Include Retrieval from the following that do not have a traditional circulation period: Libby eMagazines, TumbleBooks, InstantFix, Hoopla Music, Literature Resource Center, Safari Tech Books, etc.

## 6.8 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.

### 6.9 Use of Electronic Material

This is the total annual use of all electronic materials. Include use from the following: Overdrive, OneClickDigital, Hoopla, Hoopla Comics, Hoopla Movies, etc. **Include circulation only for items that require user authentication and have a limited period of use.**

Electronic Materials are materials that are distributed digitally online 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 use.

### 6.10 Electronic Content Use

The total annual count of the circulation of electronic materials and successful retrieval of electronic information.

### 6.11 Total Circulation of Materials

The total annual sum of Use of Electronic Material (6.9) and Circulation of All Physical Material (6.8) **or** the sum of 6.3 Total Children/Adult Circulation and 6.6 Total Adult Circulation.

### 6.12 Total Collection Use

The total annual count of physical item circulation, circulation of electronic material and successful retrieval of electronic information.

## Section 7: Registered Users

### 7.1 Number of All Registered Users (Resident and non-resident card holders)

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 or gain access to other library resources. **This includes resident and non-resident registered users. NOTE:** Files should have been purged within the past three (3) years.

### 7.2 Number of Registered Non-Resident Users

A registered non-resident user is a library user who is not a resident of any municipality the library has a contract to provide library service to and 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 or gain access to other library resources. **Note:** Files should have been purged within the past three (3) years.

### 7.4 Does the library charge overdue fines?

Answer Yes or No to the following question: As of the end of the reporting period, does the library charge overdue fines to any users when they fail to return physical print materials by the date due? **NOTE:** Overdue fines are monetary penalties that typically increase according to the number of days the materials are overdue. Overdue fines are not replacement costs for lost or damaged materials.



## Section 8: Electronic Technology

### 8.1 Number of Internet Computers Used by General Public

Report the number of Internet computers (personal computers (PCs), laptops and tablets), whether purchased, leased, or donated, used by the general public in the library.

Do not include computers that connect to the Internet for a dedicated purpose (e.g., to access an OPAC or specific database, or to train the public) or purposes.

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

Report the 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:** 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.

#### 8.2a Reporting Method for Number of Uses of Public Internet Computers

Regarding the number of Uses(Sessions) of Public Internet Computers per Year, is this an annual count or an annual estimate based on a typical week or weeks.

### 8.3 Number of Wireless Sessions Per Year

Report the number of wireless sessions provided by the library wireless service annually. Count one session for each time a device connects to the library's wireless network, regardless of the duration of connection. If possible, only count sessions for patron devices and exclude library devices such as routers, access points, printers, and public access computers; otherwise, if patron devices cannot be isolated, report sessions for all devices.

Please DO NOT include wireless usage that has been manually counted by library staff i.e., counting cars in the parking lot or people on devices in the library. Note: If an annual count of wireless sessions is unavailable, count wireless sessions during a typical week or weeks using methods like hardware logging or network scanning and multiply the count to represent an annual estimate.

#### 8.3a Method for Capturing Wireless Sessions

Regarding the number of Wireless Sessions (8.3), is this number from an annual count or an estimate based on a sampling of a typical week or weeks?

Methods used may include:

- Annual count using installed hardware/software
- Estimate based on typical week(s)

#### 8.4 Does the library have an integrated library management system (ILS)?

An integrated library management system, or “ILS” for short, is an electronic program that help librarians and users to circulate and catalogue items, manage patron activity, track item movement as well as interact with databases from other libraries or institutions, amongst other functions. An ILS (sometimes abbreviated LMS) is meant to increase the output and efficiency of a library and improve access to resources for its patrons by automating the processes that would otherwise have been done manually.

#### 8.7 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.

For the remainder of the survey (**Sections 9-12**) please report the **MOST CURRENT** information you have. This means you are supplying information that is current as of the date you are filling out this report even if the information was different for the reporting year.

### Section 9: Library Board

#### 9.5 Does the Library Board have defined term limits?

Term limits are a set number of years a member of the Board of Trustees can serve. This is usually 3-5 years per term with no more than two consecutive terms served.

#### 9.6 If the library is a municipal department, does the Library Board have a Memorandum of Understanding (MOU) between the board and municipality?

A memorandum of understanding is a formal document that outlines the services, responsibilities, and support between the municipality and the Library Board.

### Section 12: Employee Salaries

Tips for filling out the salary section:

- If you are a one-person library, report your information only under Director.
- If you are an all-volunteer library report “\$0” for Hourly Rate.
- Only one response per position is necessary. For example: if you have three Library Assistants only list the highest paid position.
- Put N/A for any position and corresponding data fields that you do not currently have at your library.