

CALIFORNIA PUBLIC LIBRARY SURVEY 2015/2016

Public Library Statistics Cooperative

INSTRUCTIONS

These instructions are written to assist you in filing this year's California Public Library Report with the California State Library. The report incorporates data elements requested by the Public Library Statistics Cooperative coordinated by the Institute of Museum and Library Services.

In financial sections, report whole dollars only, omit cents.

Enter "0" if the entry is zero. If an item does not apply or the figure is unknown, enter "N/A", do not repeat last year's figure if the figure for this year is unknown.

If an exact figure is not available but the amount is known to be greater than zero, please enter an estimate of the amount.

The due date for completion of this year's annual report is **October 7, 2016.**

If you have questions, contact Lisa Dale at (916) 653-7743 or email: lisa.dale@library.ca.gov.

DIRECTORY UPDATE

Your Directory information, as it currently exists in our files, is provided. Please review this data and make updates or corrections. Please notify CSL for major address changes only.

Question #	Element name	Description
5	Courtesy Title.	Ms., Mr., or Dr.
6 - 9	Director.	Name and title of library director.
10 - 13	Street Address. (CSL only)	Street address of main library or headquarters, including city, ZIP and ZIP+4. <i>NOTE: Please notify us of major changes only to the address for an obvious error or when a completely new address is needed.</i>
14 - 17	Mailing Address. (CSL only)	Mailing address or Post Office Box, including city, ZIP and ZIP+4 for mailing. The street address is repeated if it is the same as the mailing address. <i>NOTE: Please notify us of major changes only to the address for an obvious error or when a completely new address is needed.</i>

- 18 **Public phone.** Telephone number, with area code, by which the general public can reach the library administration during business hours whether the library is actually open for public service or not. Number will be published, so it should be one appropriate for public use. Do not report only an unstaffed answering machine number.
- 19 **Reference Phone.** Telephone number, with area code, by which the general public can reach the library's public service desk during hours the library is regularly open. Number will be published.
- 20 **FAX.** Telephone number of facsimile machine, if available.
- 21 **TDD for Deaf.** Phone number of telecommunications device for deaf patrons, if available.
- 22 **Library Director's Email Address.** Enter the Email address that State Library staff can use to communicate with the library director. It will not be published or re-distributed.
- 23 **Library's Public Email Address.** The Email address that other libraries should use for general library electronic mail access to your library.
- 24 **Library's Web Address.** The full Web address by which the library can be accessed on the Internet.
- 25 **ILL Period: # Weeks.** Enter your standard loan period for inter-library loans, in number of weeks.
- 26 **ILL Photocopying free up to 10 pages?** Y = Yes; N = No.
- 27 **Copy Fee.** If the answer to 29 is No, enter here the copy fee that is charged.
- 28 **Name of person completing this survey.** Name of person completing the survey. Person should be able to answer questions in regard to responses.
- 29 **Phone # of person completing this survey.** Phone number of person completing the survey. Person should be able to answer questions in regard to responses.
- 30 **Email address of person completing this survey.** Email contact information for person completing the survey. Person should be able to answer questions in regard to responses.

POPULATION

- 201 **Pop. of Legal Service Area. (CSL only)** Figure is based upon the California Dept. of Finance, Demographic Research Unit E-1 report issued each May 1st. Adjustments made if necessary by CSL staff to reflect the boundary of each library service area.
- 202 **Pop. Children Under Age 5.** Estimated population of children under age 5 within the library service area.
- 203 **Pop. Children Age 5-14.** Estimated population of children ages 5 to 14 within the library service area.
- 204 **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:** Files should have been purged within the past three (3) years.*
- 205 **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, although age is generally up to age 14.

OUTLETS

- 206 **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 zero.
- 207 **Number of Branch Libraries.** A branch is an extension library open some part of each of at least five days a week, has at least 1,400 sq. ft. of floor space, a general book collection of at least 7,000 volumes, and is staffed with the equivalent of at least one librarian and one clerical employee during the hours open for service. Enter number of branches. Include in the count any branch that opened or closed part way through the year.
- 208 **Number of Stations.** A station is a library structure smaller than a branch, providing a lower level of service. All stations have all of the following, however: 1.) separate quarters; 2.) a permanent basic collection; 3.) at least one established, paid position; and 4.) a regular schedule for opening to the public. Enter number of stations. Include in the count any station that opened or closed part way through the year.
- 210 **Number of Bookmobiles.** Truck or van that is specially equipped and serves as a traveling branch library. Enter number of vehicles in public service, not number of stops made. Do not include non-public delivery vehicles or other library vehicles.

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.

251 **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, Report Year. Each person employed counts as one, whether they are employed full or part time.

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.

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

***NOTE:** Report only those positions that require a master's degree from an American Library Association accredited library and information studies program. Do not include staff who have a master's degree from an American Library Association accredited library and information studies program in positions that do not require an MLS degree.*

253 **FTE Total Librarians.** FTE all Librarians, including Library Director. Include accredited from item 252 and any unaccredited with title of Librarian. 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 (252).

Enter next all other support persons not called Librarian. This includes all other FTE employees paid from the reporting unit budget, including plant operations, security, and maintenance staff.

254 **FTE Special Professionals.** FTE special professionals, non-Librarian. Include business manager, personnel director, literacy specialist, public relations, etc.

255 **FTE Lib. Tech. Assistants.** FTE Library Technical Assistants (AA degree).

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

259 **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.

INCOME – FOR OPERATIONAL EXPENDITURES

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).

301 **Local Government.** Local Government Income 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.).*

302 **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).*

303 **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.

304 **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.

INCOME – FOR CAPITAL OUTLAY

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:

- 309 **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.
- 310 **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.
- 311 **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.
- 312 **Other income.** Report private (non-governmental funds), including grants received by the library for the purpose of major capital expenditures.

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.

- 401 **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.
- 402 **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, workmen's compensation, tuition, and housing benefits.

- 404 **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).
- 405 **Print Serial Subscriptions.** Expenditure for current print serials including newspapers, periodicals, annual reports, yearbooks and proceedings.
- 407 **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.]
- 408 **Other Materials.** Report all operating expenditures for other materials, such as microform, audio and video physical units, DVD, and materials in new formats.
- 410 **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

- 500 **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.

EXPENDITURES - Detail

- 501- 503 Detail on selected special expenditures included in Standard Operational Expenditures.
- 501 **Preservation.** Expenditures on measures to conserve the collection including binding and rebinding, deacidification, lamination and restoration. Do not include salaries.
- 502 **Children's Materials.** Expenditures for Children's Materials. Includes estimated expenditures for materials in all formats marked children's that are purchased for use by patrons 14 years and younger, or adults.
- 503 **Adult Literacy Program.** Expenditures for an adult basic literacy program, from all sources, federal, state and/or local.

COLLECTIONS

- 601 **Children's Books Added.** Total number of books added to Children's Collection(s).
- 602 **Books Children Held.** Total number of Children's Books held, 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.
- 603 **Books Young Adult Held.** Total number of Young Adult books held, 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.
- 604 **Books Added.** Total number of print books added including both children's and adult.
- 605 **Book Titles Added.** Number of book titles represented by count of books added, item 604.
- 606 **Books held.** Total number of books held, June 30 of report year. Books are non-serial printed publications (including music and maps) that are bound in hard or soft covers, or in loose-leaf format. 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.
- 607 **Government Documents.** Number of non-serial government documents held in separate collection. Exclude microforms.
- 609 **Electronic 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 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”.

610

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.

611

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 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”.*

612 **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).

613 **Video – 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 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”.*

614 **Electronic Collections.** (formerly Licensed Databases)
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.*

NOTE: *In California almost all databases are locally funded.*

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

614a. _____ Local/other cooperative agreements (or consortia) within state or region
614b. _____ State government or State library funded
614c. Total: _____

- 615 **Current Print Serial Subscriptions.** 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.
- 616 **Catalog Records.** The number of bibliographic (title) records in your catalog (OPAC) as of June 30th. If your records are part of a union catalog please request a count of title records to which your library has attached holdings from the union catalog system administrator.
- 617 **Children's Audio Materials.** Number of cataloged and uncataloged audio-recorded materials held in Children's Collection(s). Include all formats, cassettes, CD's, phonorecords, talking books, and other sound recordings.
- 618 **Children's Video Materials.** Number of cataloged and uncataloged video-recorded materials held in Children's Collection(s). Include all formats, videocassettes, DVD's, etc.
- 619 **Equipment.** Number of cataloged and uncataloged items in collection that circulate. Include all non-print, non-digital items, such as computers, tablets, "Library of Things", tools, toys, etc.

LIBRARY SERVICE, ANNUAL

Report **annual totals** in this section.

- 801 **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).*

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.

A reference transaction includes information and referral service as well as unscheduled individual instruction and assistance in using information sources (including web sites and computer-assisted instruction). Count Readers Advisory questions as reference transactions.

Information sources include (a) printed and non-printed material including the internet; (b) 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.

NOTE: *It is essential that libraries do not include directional transactions in the report of reference transactions except as noted above. Directional transactions include giving 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?"*

NOTE: *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. [If the sample is done four times a year, multiply totals by 13; if done twice a year, multiply by 26; if done only annually, multiply 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 in the library. Choose a week in which the library is open its regular hours.*

Technology Assistance. Number of individual transactions for technical assistance in use of technology related resources such as hardware, software or online resources **included in the previous question.** Count is for how to use the information resource, or how to extract information from the information resource, e.g. how to set up an email account, how to save a file to a thumb drive, how to search a database, etc. These transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use technology to obtain information. A Technology Assistance transaction includes instruction and assistance in using information sources as defined in Reference Questions and including websites and computer-assisted instruction.

NOTE: *Examples of directional technology transactions that should not be counted include, "Where are your public computers? How do I apply for a library card (if application is online)? Can you help me use the self-checkout machine?"*

- 803 - 807 **Circulation.** Circulation of all materials of all types including renewals.
- 803 **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.*
- 804 **Circulation of Children's Materials.** Total circulation (including renewals) of cataloged and uncataloged 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.
- 805 **Circulation of Non-English Materials.** Count of total non-English language materials in all formats (adult, YA, and Children's) circulated annually.
- 806 **Circulation of Non-book Materials.** Count of total non-book materials circulated annually. Include e-books, audiovisuals, audiobooks, microforms, software, and all other non-print items.
- 806a **Equipment Circulation.** Count of cataloged and un-cataloged items circulated annually. Include all non-print, non-digital items, such as computers, tablets, "Library of Things," tools, toys, etc. These items should also be included in Item #806.
- 807 **Circulation of Electronic Materials.** 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 the LIBRARY COLLECTION data elements 609-613. Do not include items **not** specified under those definitions.
- 808 **Successful Retrieval of Electronic Information.** 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]
- 810 **Total Circulation.** Total annual circulation (including renewals), library materials of all types. Circulation means check out of materials to registered borrowers for use outside the library. 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.

812 - 813 **Inter-Library Loans.** 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.

812 **Loans to Others.** Annual count of items provided ILL to other libraries.

813 **Loans Received.** Annual count of items received ILL from other libraries.

814 - 823 **Programs.** 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.*

***NOTE:** If a program serves multiple age groups, select the one age group below that best matches the program's target or majority audience.*

***NOTE:** Pre-school is defined as 0 through 5 years, and school-age as 6 through 11 years. 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.*

Pre-School #814 – 815

A pre-school children's program is any planned event for which the primary audience is pre-school children ages 0 to 5 years and which introduces the group of pre-school children attending to any of the broad range of library services or activities for children or which directly provides the information to participants. Pre-school children's programs may cover use of the library, library services, or library tours. Pre-school children's programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of programs include story hours and summer reading events.

Count all pre-school children's programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include pre-school children's programs sponsored by other groups that use library facilities. If pre-school 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 pre-school 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.

Annual Pre-School Children's Program Attendance is the actual count over the course of a year of the attendance of adults, young adults and children at programs which have all or a portion of their target market intended for children ages 0 to 5 years.

*Please count all patrons that attend pre-school programs regardless of age.

School-Age #816 – 817

A school-age children's program is any planned event for which the primary audience is school-age children ages 6 to 11 years and which introduces the group of school-age children attending to any of the broad range of library services or activities for children or which directly provides information to participants. School-age children's programs may cover use of the library, library services, or library tours. School-age children's programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of programs include story hours and summer reading events.

Count all school-age children's programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include school-age children's programs sponsored by other groups that use library facilities. If school-age children's 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 school-age 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.

Annual School-Age Children's Program Attendance is the actual count over the course of a year of the attendance of adults, young adults and children at programs which have all or a portion of their target market intended for children ages 6 to 11 years.

*Please count all patrons that attend school-age children's programs regardless of age.

Young Adult #818 – 819

A Young Adult program is any planned event for which the primary audience is young adult 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.

Annual Young Adult Program Attendance is the actual count over the course of a year of the attendance of adults, young adults and children at programs which have all or a portion of their target market intended for young adults ages 12 to 18 years.

*Please count all patrons that attend the young adult programs regardless of age.

Adult #820 – 821

An adult program is any planned event for which the primary audience is adult and which introduces the group of adults attending to any of the broad range of library services or activities for adults or which directly provides information to participants. Adult programs may cover use of the library, library services, or library tours. 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, instruction and reading events.

Count all adult programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include adult programs sponsored by other groups that use library facilities. If 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 adults delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, or services to homebound.

Annual Adult Program Attendance is the actual count over the course of a year of the attendance of adults, young adults and children at programs which have all or a portion of their target market intended for adults.

*Please count all patrons that attend the adult programs regardless of age.

Off-Site #822 – 823

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.

Count all 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.

Annual Off-Site Program Attendance is the actual count over the course of a year of the attendance 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.

NOTE: *These programs should also be included in responses for above age-related programming/attendance.*

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 nine 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. The first 6 positions (items 901-910) are considered professional Librarian classes. Lib. Tech. Asst. is a paraprofessional class, sometimes called Library Technician; it requires specialized training or job skills/experience but does not require an MLS.

901 - 902 **Library Director.** Chief Administrator of library.

- 903 - 904 **Assistant Director.** Deputy line position with library-wide responsibilities; not administrative assistant.
- 905 - 906 **Chief of Division.** Professional line position supervising other librarians.
- 907 - 908 **Branch Librarian.** Professional line position normally supervising other staff in branch library location.
- 909 - 910 **Entry Level Librarian.** Beginning professional with library training but normally without previous professional library work experience.
- 911 - 912 **Journeyman Librarian.** Second level professional with library training and normally with previous professional library work experience.
- 913 - 914 **Library Technical Assistant.** Para-professional with AA degree in library science or equivalent.
- 915 - 916 **Clerk.** Beginning non-professional employee without library work experience or special training. Not hourly or student paging help.
- 917 - 918 **Manager.** Manager of special library service, normally not a Librarian but professional in another field (e.g., Business Manager, Personnel Officer, Literacy Coordinator).

ELECTRONIC SERVICES

- 856 **California Teleconnect Fund.** If your library took advantage of the California Teleconnect Fund subsidies during this report year, Y = Yes; N = No.
- 857 **Federal E-Rate.** If your library took advantage of the federal E-Rate subsidies during this report year, Y = Yes; N = No.
- 858 **CIPA Compliant.** If your library is compliant with CIPA (Children's Internet Protection Act) compliant, Y = Yes; N = No.

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.

- 859 **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.

- 860 **Virtual visits to the library (website or catalog).** Visits represent the number of individual sessions initiated by all visitors from outside the library to your site. A visit/session ends when someone closes their browser or stops loading web pages on the website for a period of time (typically when more than 30 minutes elapses between page views, but this is arbitrary).
- 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.)
- 861 **Wireless Sessions per year.** Report the number of wireless sessions provided by the library wireless service annually.
- 862 **RFID.** Does your library use a Radio Frequency Identification (RFID) system for circulation? Y = Yes; N = No.

REFERENDA INFORMATION

Please leave blank if no referenda occurred during the report year. **Do not report referenda from prior years.**

- 870 **Election Date.** Election Date (in MM/DD/YYYY format).
- 871 **Local Agency Authorizing Election.** Examples: City of San Jose, County of Orange, Beaumont Library District.
- 872 **Funding Purpose.** Options: Operations, Facilities, Facilities & Operations, Other.
- 873 **Type of Tax.** Options: Benefit Assessment, Business License Tax, Excise Tax, Gann Limit Override, General Obligation Bond, Parcel Tax, Sales Tax, Special Tax, Transient Occupancy Tax, Utility Users Tax, Other.
- 874 **Percentage of "Yes" Vote.** From results of referenda, with one decimal, i.e., 65.8%.
- 875 **Vote Requirement to Pass.** Options: Majority, Supermajority and Other.
- 876 **Vote Outcome.** Options: Pass, Fail.
- 877 **Notes.** Additional information concerning the referenda.

MOBILE LIBRARIES

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

- a truck or van that carries an organized collection of library materials;
- a paid staff; and
- regularly scheduled hours (bookmobile stops) for being open to the public.

If you reported on operation of a mobile library in the previous report year, a record is provided to you for each mobile library operation you reported, indicating your last year's description of that operation. Where corrections or updates are appropriate, please make those changes in the space provided.

A new record can be created on which to record any new mobile library operations not previously reported, click on the "Add Group" button.

If no bookmobiles then **leave blank**.

- 5 **Name.** Name of bookmobile.
- 6 - 10 **Street Address. (CSL only)** Street address where bookmobile is stationed when not in use, including city, county, ZIP and ZIP+4.
- NOTE:** *Please notify us of major changes to the address only such as an obvious error or a completely new address is needed.*
- 11 **Phone.** Telephone number, with area code, for general public use.
- 12 **Type:** Bookmobile/Van/Other
- 13 **Make:**
- 14 **Model:**
- 15 **Year:** Year of manufacture of the bookmobile, i.e., the model year.
- 16 **Chassis Manufacturer:** Company that manufactured the bookmobile.
- 17 **Length:** In feet.
- 18 **Book Capacity in Volumes:**
- 19 **Miles traveled per year:**
- 20 **Number of individual stops on route per week:**
- 21 **Total hours in public service for the year (omit travel time):**
- 22 **Total Number of weeks in public service for the year.**
- 23 **Librarians on vehicle.**

- 24 **Driver/clerks on vehicle.**
- 25 **Support Staff off vehicle.**
- 26 **Total materials circulation per year.**
- 27 **Yearly operating and maintenance cost.** (Examples: fuel, maintenance, repair, labor and parts. Do not include personnel costs.)
- 28 **Number of Internet Terminals - General Public.**

OUTLETS

Include all branches, stations, and central libraries. Do not include in this report any administrative headquarters that are not public service outlets; do not include other outlets or deposit only locations.

Complete one set of forms/input screens for each fixed-facility public service outlet.

New Library Outlets: Click on "ADD GROUP" in the survey to create a new record for a new library service outlet.

Closed Outlets: If an outlet for which we have provided you a California Library Outlets Survey entry was closed during this report year write a "note to the state" for Section 1 of the Web-based input form. Please also include the date the outlet closed if that is easily available. Enter any data for the time period the outlet was open.

Updates to Existing Outlets: On the California Library Outlets Survey, you do not need to provide any response where there is no change in data from that which is indicated as currently in our file. Date built, date remodeled, # of square feet are all examples of data which probably has not changed.

5 **Name.** Name of outlet.

6 - 9 **Street Address. (CSL only)** Street address of outlet as of June 30 th , including city, ZIP and ZIP+4.

***NOTE:** Please notify us of major changes only to the address for an obvious error or when a completely new address is needed.*

10 - 14 **Mailing Address. (CSL only).** Mailing address of outlet, including city, county, ZIP and ZIP+4 for mailing. This is particularly important if it is different from street address. The street address is repeated if it is the same as the mailing address.

***NOTE:** Please notify us of major changes only to the address for an obvious error or when a completely new address is needed.*

15 **FAX.** Telephone number of fax machine in the outlet, if applicable.

16 **Phone.** Telephone number, with area code, for general public use.

17 **Type of Outlet.** Select appropriate code, based on the following definitions:

CE = Central. A central or main library, so designated by the jurisdiction, and which is open for public service.

BR = Branch. A branch is an extension library open some part of each of at least five days a week, has at least 1,400 sq. ft. of floor space, a general book collection of at least 7,000 volumes, and is staffed with the equivalent of at least one paid librarian and one paid clerical employee during the hours open for public service.

ST = Station. A station is a library structure smaller than a branch, providing a lower level of service. All stations have all of the following, however: 1) separate quarters; 2) a permanent basic collection; 3) at least one established, paid position; and 4) a regular schedule for opening to the public.

***NOTE:** Separate quarters does not necessarily mean separate building, only a separate facility,*

which could be in a building that also houses other agencies or operations. The facility within the larger building is under the library's control for the provision of library services. Not included would be areas within a facility housing a deposit collection or some such.

- 18 **Facility Owned By.** If the owner of the physical facility has changed from that already recorded, replace the existing data with the 4-letter code (options are on the report form/input screen) that best describes the current owner of the facility in which this outlet is housed.
- CITY - City
CNTY - County
SPDT - Special District
PSCH - Public School
PUAG - Public Agency
PRIV - Private
MULT - Multiple Ownership
- 19 **Facility Upgrade Needs.** Using one of the codes provided on the report form/input screen, indicate whether this facility needs some level of upgrade. Enter N/A if no upgrade is currently needed.
- RMDL - Remodel
EXPN - Expansion
RMEX - Remodel and Expansion
RPLC - Replace
N/A - Not Applicable
- 20 **Population Served.** Population served by this outlet. Figure reported may be from planning department, library registration records, or your estimate. Do not report population of library jurisdiction as a whole, unless this is a one-outlet library.
- 21 **Staff FTE.** Full-time equivalent of staff paid to operate outlet. Do not include volunteer help. Full-time is normally 40 hours per week but not less than 36. The FTE of one full-time position is "1." To compute the FTE of a part-time position, divide number of hours worked per week by hours of normal workweek. The FTE of one 20-hour position is "0.5." Add total full-time positions and FTE of part-time positions for total Staff FTE.
- 22 **Hours Open, Weekly.** Number of hours the outlet is open for public service in a typical week.
- 23 **Hours annual.** Total number of hours outlet is open for public service per year.
- 24 **Weeks annual.** This is the number of weeks during the year that the outlet was open to the public 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.
- 25 **Volumes.** Number of volumes held by outlet in all physical formats. Include rotating collections if normally available.
- 26 **Circulation.** Total annual circulation transactions of this outlet.
- 27 **Total Outlet Operating Expenditure.** Total dollars expended on this outlet per year, in whole dollars. Do not include capital outlay or expenses of general library jurisdictional support functions. Estimate if necessary.

- 28 **Year Built.** Year the building housing library outlet was originally built.
- 29 **Year Opened.** Date that library service began in the community by the opening of an outlet, month and year (06/2002). If month unknown use "01". Can be the date an earlier library building opened.
- 30 **Year Remodeled.** Year the building housing library outlet was last remodeled.
- 31 **LEED Certification.** Is this Outlet LEED certified? For new construction and renovation of library buildings LEED certification is often sought, reflecting the energy efficiency of the structure. LEED certification is based on national certification standards from the US Green Building Council. More information on LEED certification is available at <http://www.usgbc.org/certification>. If you are not sure if the building has a level of LEED certification, you might check with your jurisdiction's General Services department.
- Certified? Indicate certification level, if known
 No
 LEED Certified
 LEED Platinum
 LEED Gold
 LEED Silver
 Don't know
- 32 **Gross sq. ft.** Provide the area, in square feet, of the public library outlet. Report the total area in square feet; this is the area on all floors enclosed by the outer walls of the library outlet. Include all areas occupied by the library outlet, 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.
- 33 **Reader seats.** Number of seats for readers in outlet. Do not include public access computers as reader seats.
- 34 **Days open per week.** Record the number of days per week that this facility is open for use by the public for at least 2 hours per day.
- 35 **Staffing = 1 librarian/1 clerical?** Is this facility staffed by the equivalent of at least one paid librarian and one paid clerical employee during all the hours that facility is open for service to the public? Y = Yes; N = No.
- 36 **Separate quarters?** Is this outlet housed in separate quarters (i.e., not physically within another service facility such as a nursing home, teen center, grocery store)? Not necessarily a separate structure, but separate quarters within a single structure if a physical facility is shared. If the answer is no then this outlet does not qualify as a station or branch. Contact the State Library for additional assistance.
- 37 **Established schedule of hours?** Does this facility have an established schedule of hours for which it is open to the public? Y = Yes; N = No.

38 **Adequacy of Facility.** Assess the adequacy of the library facility in terms of the size and condition of the building. Rate the adequacy on a scale of 1 to 10, with 10 being the top of the scale (i.e., just finished new building which is in excellent condition and large enough to serve the population for the long term).

Poor Fair Average Good Excellent
1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10

39 **Number of Internet Terminals – General Public.** Report the number of Internet terminals (personal computers (PCs), and laptops), whether purchased, leased or donated, used by the general public in the library.

40 **Internet Connection Speed.** Select the fastest Internet connection speed available at your library from the drop down list. The connection speed should be based on the incoming data line to the building, not the speed at any individual workstation.

- Less than 1.5Mbps (megabits/second)
- 1.5Mbps
- 1.6Mbps - 6.0Mbps
- 6.1Mbps - 10Mbps
- 10.1Mbps - 40Mbps
- 40.1Mbps – 1.0Gbps (gigabits/second)
- Greater than 1.0 Gbps
- Unknown
- No Connection

41 **Wi-Fi.** Is Wireless Internet access is available at this location at no charge to patrons?
Y = Yes; N = No