# California
# STATE LIBRARY
F O U N D E D  1 8 5 0
PRESERVING OUR HERITAGE, SHAPING OUR FUTURE

CALIFORNIA PUBLIC LIBRARY SURVEY FY 18/19
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 a figure is unknown, check the "unavailable" box. This will insert a "-1" in the data field. 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.

There are edit check functions on many data elements. If you enter an amount that is significantly different than the previous year, for instance, you will receive an error. Please verify the accuracy of your entry, and if it is correct, make a note explaining the difference by clicking on the notepad icon to the left of the the data entry box.

| | | |
|---|---|---|
| ☐ | **3.1 Local Government (all sources)** | |
| ☐ | **3.2 State Funds (e.g. CLSA, PLF, ELLI, etc.)** | |
| ☐ | **3.3 Federal Funds (e.g. LSTA or other)** | |
| ☐ | **3.4 All Other Operating Income** | |
| ☐ | **3.5 Total Operating Income** | |
| ☐ | **3.6 CA Literacy Services** | |

The due date for completion of this year's annual report is Friday, November 1, 2019.

## Section 1: Directory and Administrative Information

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.

1.5
**Courtesy Title.** Ms., Mr., or Dr.

1.6 – 1.9
**Director.** Name and title of library director. Please enter the name and title of the person with direct overall administrative responsibility for the library.

1.10 – 1.13
**Street Address.** (CSL only) Street address of main library or headquarters, 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.*

1.14 – 1.17
**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.

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

1.18
**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.

1.19
**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.

1.20
**TDD for Deaf.** Phone number of telecommunications devices for deaf patrons, if available.

1.21
 **Library Director's Email Address.** Enter the e-mail address that State Library staff can use to communicate with the library director. It will not be published or re-distributed.

1.22
**Library's Public Email Address.** The e-mail address that other libraries should use for general library electronic mail access to your library.

1.23
**Library's Web Address.** The full Web address by which the library can be accessed on the Internet.

1.24
**Name of person completing this survey**. Name of person completing the survey. Person should be able to answer questions in regard to responses.

1.25
**Phone # of person completing this survey.** Phone number of the person completing the survey. Person should be able to answer questions in regard to responses.

1.26
**E-mail 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.

Items 1.27-1.39 are filled by CSL only.

## Section 2: Population and Outlets

**2.1**
**Pop. of Legal Service Area.** (This figure is pre-filled by CSL) 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.

**2.2**
**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.*

**2.3**
**Children Borrowers.** Number of children registered with the library for circulation and other services, as of June 30 of the Report Year. Report individual rather than household registration. Files should have been purged at least once within the last three years. Children borrowers are those who receive a child/youth library card. Specific age can vary by library system.

**Outlets**

**2.4**
**Main (Central) Library.** If jurisdiction has a central or main library open for public service, enter "1". Do not report administrative headquarters if not open for public library service. If there is no central or main library then enter "0" (zero).

**2.5**
**Number of Branch Libraries.**
A branch library is an auxiliary unit of an administrative entity which has **at least all of the following**:
- Separate quarters
- An organized collection of library materials
- Paid staff
- Regularly scheduled hours open to the public.

**2.6**
**Number of Bookmobiles.** A traveling branch library. A bookmobile consists of at least all of the following:
- A Truck or van that carries an organized collection of library materials
- Paid staff
- Regularly scheduled hours for being open to the public.

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

2.7
**Total # of Outlets** is automatically totaled.

2.8
**Total Square Footage** is automatically totaled from entries of square footage in the outlets section (Section 10).

## Section 3: Library Income

**Operating expenses**
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).

3.1
**Local Government.** This includes all local government funds designated by the community, district, or region and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, library fines, fees, or grants. Include contract payments from another jurisdiction for library services provided. Do not include state, federal, and other funds passed through local government for library use. Report these funds with state government revenue or federal government revenue, as appropriate.

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

3.2
**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).*

3.3
**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.

3.4
**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.

3.6
**CA Literacy Services** This is pre-filled by CSL

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

3.7
**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.

3.8
**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.

3.9
**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.

3.10
**Other capital income**. Report private (non-governmental funds), including grants received by the library for the purpose of major capital expenditures.

## Section 4: Library Expenditures

Operating expenditures are the current and recurrent costs necessary to support the provision of library services. Significant costs, especially benefits and salaries, that are paid by other taxing agencies (government agencies with the authority to levy taxes) "on behalf of" the library may be included if the information is available to the reporting agency. Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Do not report the value of free items as expenditures. Do not report estimated costs as expenditures. Do not report capital expenditures under this category. Report whole dollars only, omit cents. Include local, state, federal, and other funding sources.

**Staff Expenditures**
4.1
**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.

4.2
**Employee Benefits.** These are the benefits outside of salaries and wages paid and accruing to employees (including plant operations, security, and maintenance staff), regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts for direct paid employee benefits including Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, worker's compensation, tuition, and housing benefits.

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

4.4
**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).

4.5
**Print Serial Subscriptions.** Expenditure for current print serials including newspapers, periodicals, annual reports, yearbooks, and proceedings.

4.6
**Total Print Material Expenditures.** This is auto-calculated sum of 4.4 and 4.5

4.7

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

*Note: Expenditures for computer software used to support library operations or to link to external networks, including the Internet, are reported under Other Operating Expenditures (data element #357).*

4.8

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

4.9

**Total Collection Expenditures.** This is an auto-calculated total of 4.6, 4.7, and 4.8.

4.10

**All Other Operating Expenditures.** This includes all expenditures other than those reported for Total Staff Expenditures and Total Collection Expenditures.

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

**Capital Expenditures**

4.12

**Total Capital Expenditures.** Report major capital expenditures (the acquisition of or additions to fixed assets). Examples include expenditures for (a) site acquisitions; (b) new buildings; (c) additions to or renovation of library buildings; (d) furnishings, equipment, and initial book stock for new buildings, building additions, or building renovations; (e) library automation systems; (f) new vehicles; and (g) other one-time major projects. Include federal, state, local, or other revenue used for major capital expenditures. Only funds that are supported by expenditure documents (e.g., invoices, contracts, payroll records, etc.) at the point of disbursement should

be included. Estimated costs are not included. Exclude expenditures for replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. Exclude contributions to endowments, or revenue passed through to another agency (e.g., fines). Funds transferred from one public library to another public library should be reported by only one of the public libraries.

## Section 5: Library Staff

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

5.1
**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, 2018. Each person employed counts as one, whether they are employed full or part time.

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

5.2
**ALA Librarians.** FTE Librarians with master's degrees from programs of library and information studies accredited by the American Library Association.

5.3
**FTE Total Librarians.** Persons with the title of librarian who do paid work that usually requires professional training and skill in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. This data element also includes ALA Librarians (Item 5.2)

5.4
**All Other Paid Staff**
This includes all other FTE employees paid from the reporting unit budget, including plant operations, security, maintenance staff.

5.5
**Total Staff FTE.** This is an auto-calculated sum of 5.3 and 5.4

5.6
**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.

## Section 6: Library Collection

This section of the survey collects data on selected types of materials. It does not cover all materials (i.e., microforms, loose sheet music, maps, and pictures) for which expenditures are reported under Print Materials Expenditures, Electronic Materials Expenditures, and Other Materials Expenditures (data elements #353, #354, and #355).

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.

6.1
**Books Children Held as of June 30.**
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.

6.2
**Books Young Adult Held.**
Total number of Young Adult books held, June 30 of report year. Include cataloged and uncatalogued print materials (number of items, not number of titles). Do not include serials, periodicals, or other formats. Should we put these beneath books held?

6.3
**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.

6.4
**Electronic Books.** (See CSL Flowchart "Counting Electronic Items and Usage" for assistance) E-books are digital documents (including those digitized by the library), licensed or not, where searchable text is prevalent, and which can be seen in analogy to a printed book (monograph). E-books are loaned to users on portable devices (e-book readers) or by transmitting the contents to the user's personal computer for a limited time. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired. Report

the number of electronic units, including duplicates, at the administrative entity level; do not duplicate unit count for each branch. E-books packaged together as a unit (e.g., multiple titles on a single ebook reader) and checked out as a unit are counted as one unit.

Report the number of units. Report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.

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

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

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

6.5
**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 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.

6.6
**Audio – downloadable units.** (See CSL Flowchart "Counting Electronic Items and Usage" for assistance) These are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced (played back) electronically. Audio – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user's personal computer for a limited time. Include Audio – Downloadable Units for which permanent or temporary access rights have been acquired.

Report the number of units. Report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.

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

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

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

## 6.7
**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).

## 6.8
**Video – downloadable units.** (See CSL Flowchart "Counting Electronic Items and Usage" for assistance) These are downloadable electronic files on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver, computer monitor or video-enabled mobile device. Video – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user's personal computer for a limited time. Include Video– Downloadable Units held locally and remote Video – Downloadable Units for which permanent or temporary access rights have been acquired.

Report the number of units. Report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the

catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.

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

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

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

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

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

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

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

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

6.9

Local/other cooperative agreements (or consortia) within state or region

6.10

State government or State library funded

6.12

**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.

## Section 7: Library Services

7.1
**Hours Open, All Outlets**
This is the auto-calculated sum of annual public service hours from the outlet and bookmobile sections.

7.2
**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).*

7.3
**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 websites and computer-assisted instruction). Count Readers Advisory questions as reference transactions. Information sources include (a) printed and nonprinted material; (b) machine-readable databases (including computer-assisted instruction); (c) the library's own catalogs and other holdings records; (d) other libraries and institutions through communication or referral; and (e) persons both inside and outside the library.

When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again. If a contact includes both reference and directional services, it should be reported as one reference transaction. Duration should not be an element in determining whether a transaction is a reference transaction.

*NOTE: It is essential that libraries do not include directional transactions in the report of reference transactions. 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.*

**Circulation**

7.4
**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.*

7.5
**Circulation of Children's Materials.** Total circulation (including renewals) of cataloged and uncatalogued materials (in all formats) marked as Children's whether they are borrowed by a child, young adult, or adult over the course of the report year.

7.6
**Circulation of Non-English Materials.** Count of total non-English language materials in all formats (Adult, YA, and Children's) circulated annually.

7.7
**Circulation of Electronic Materials.** (See CSL Flowchart "Counting Electronic Items and Usage" for assistance) Electronic Materials are materials that are distributed digitally and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Types of electronic materials include e-books and downloadable electronic video and audio files. Electronic Materials packaged together as a unit and checked out as a unit are counted as one unit. Include circulation only for items counted under Electronic Books (E-Books), Audio-Downloadable Units and Video-Downloadable Units in Section 6: Library Collection (Items 6.4, 6.6, and 6.8). Do not include items not specified under those definitions.

7.8
**Successful Retrieval of Electronic Information.** (See CSL document"Counting Successful Retrieval of Electronic Information" for assistance) The number of full-content units or descriptive records examined, downloaded, or otherwise supplied to user, from online library resources that require user authentication but do not have a circulation period. Examining documents is defined as having the full text of a digital document or electronic resource downloaded or fully displayed. Some electronic services do not require downloading as simply viewing documents is normally sufficient for user needs. Include use both inside and outside

the library. Do not include use of the OPAC or website. [based on NISO Standard Z39.7 (2013) #7.7, p. 43]

**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.

7.12
**Loans to Others.**  Annual count of items provided ILL to other libraries.

7.13
**Loans Received.**  Annual count of items received ILL from other libraries.

**Programming**

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

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

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

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

**Children's programming**
A children's program is any planned event for which the primary audience is children and which introduces the group of children attending to any of the broad range of library services or activities for children or which directly provides information to participants. Children's programs may cover use of the library, library services, or library tours. 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.

*Note: The National Center for Education Statistics (NCES): Children and Young Adults Defined (Services and Resources for Children and Young Adults in Public Libraries [August 1995, NCES 95357]) defines children as persons age 11 years and under.*

7.14
**# of Children's programs.** Count all children's programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include children's programs sponsored by other groups that use library facilities. If children's programs are offered as a series, count each program in the series. For example, a story hour offered once a week, 48 weeks a year, should be counted as 48 programs. Exclude library activities for children delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.

7.15
**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 11 years.

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

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

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

7.16
**# of Young Adult Programs.** 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.

7.17

**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 Programming**

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.

7.18

**# of Adult programs.** 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.

7.19

**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 Programming**

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

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

7.20

**Number of Off-Site Programs.** 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.

**7.21**
**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.

**Electronic Services**

**7.24**
**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. The library must have an internet safety policy adopted by the board at a public meeting.

**7.25**
**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.*

**7.26**
**Website visits.** Visits represent the annual number of sessions initiated by all users from inside or outside the library to the library website. The library website consists of all webpages under

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

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

7.27
**Wireless Sessions per year.** Report the number of wireless sessions provided by the library wireless service annually. If you are unable to report this number, check the box "Unavailable" (to the right of the data entry field) and a "-1" will be automatically entered.

7.28
**Number of Internet Terminals**
This is an automatic sum of the number of terminals entered for each bookmobile and outlet in sections 9 and 10.

**Library and Community Development and Support Information**
Select yes/no/don't know from the drop-down menu.
You are strongly encouraged to click the notepad icon next to the data element and share how your programming has played a role in participants lives. Your stories are inspirational and useful in demonstrating libraries' important role in the community

7.29
Did your library provide support for vulnerable populations in the community?

7.30
Did your library support your users' personal economic development?

7.31
Did your library play a role in responding to, or building resilience after, a crisis in the community?

7.32
Did your library support users' personal learning and knowledge development?

7.33
Did your library help in develop social capital in your community?

## Section 8: Referenda

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

8.1
**Election Date.** Election Date (in MM/DD/YYYY format).

8.2
**Local Agency Authorizing Election.** Examples: City of San Jose, County of Orange, Beaumont Library District.

8.3
**Funding Purpose.** Options: Operations, Facilities, Facilities & Operations, Other.

8.4
**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.

8.5
**Percentage of "Yes" Vote.** From results of referenda, with one decimal, i.e., 65.8%.

8.6
**Vote Requirement to Pass**. Options:  Majority, Supermajority and Other.

8.7
**Vote Outcome.**  Options:  Pass, Fail.

8.8
**Notes.**  Additional information concerning the referenda.

## Section 9: Bookmobiles

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.

9.5
**Name.** Name of bookmobile.

9.6 – 9.10
**Street Address.** (pre-filled by CSL) 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.*

9.11 **Phone.** Telephone number, with area code, for general public use.
9.12 **Type:** Bookmobile/Van/Other
9.13 **Make:**
9.14 **Model:**
9.15 **Year:** Year of manufacture of the bookmobile, i.e., the model year.
9.16 **Chassis Manufacturer:** Company that manufactured the bookmobile.
9.**17** **Length:** In feet.
9.18 **Book Capacity:** in Volumes
9.19 **Total Mileage:** Miles traveled per year
9.20 **Number of Stops:** Number of individual stops on route per week
9.21 **Service Hours:** Total hours in public service for the year (omit travel time)
9.22 **Weeks per Year:** Total Number of weeks in public service for the year.
9.23 **Librarians on vehicle:** Report FTE (40 hours/wk = 1 FTE)
9.24 **Driver/clerks on vehicle:** Report FTE (40 hours/wk = 1 FTE)
9.25 **Support Staff off vehicle:** Report FTE (40 hours/wk = 1 FTE)
9.26 **Circulation Total:** Total materials circulation per year.
9.27 **Yearly operating and maintenance cost.** (Examples: fuel, maintenance, repair, labor and parts. Do not include personnel costs.)

9.28    **Number of Internet Terminals:** General Public. Report the number of the bookmobile's Internet computers (personal computers and laptops), whether purchased, leased, or donated, used by the general public in the library.

## Section 10: Outlets

Include all branches 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. Contact Counting Opinions for assistance (support@countingopinions.com) in adding a new 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.

10.5
**Name.**   Name of outlet.

10.6 - 10.9
**Street Address.** (Prefilled by CSL) Street address of outlet as of June 30th, 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.*

10.10 - 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.*

**10.15**
**Phone.**   Telephone number, with area code, for general public use.


**10.16**
**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 library is an auxiliary unit of an administrative entity which has **at least all of the following**:
- Separate quarters
- An organized collection of library materials
- Paid staff
- Regularly scheduled hours open to the public.

*NOTE: Separate quarters does not necessarily mean a 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.*

**10.17**
**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

**10.18**
**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

**10.19**

**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.

10.20
**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.

10.21
**Hours Open, Weekly.** Number of hours the outlet is open for public service in a typical week.

10.22
**Hours annual.** Total number of hours outlet is open for public service per year.

10.23
**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.

10.24
**Volumes.** Number of volumes held by outlet in all physical formats. Include rotating collections if normally available.

10.25
**Circulation.** Total annual circulation transactions of this outlet.

10.26
**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.

10.27
**Year Built.** Year the building housing library outlet was originally built.

10.28
**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.

10.29
**Year Remodeled.** Year the building housing library outlet was last remodeled.

**10.30**
**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

**10.31**
**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.

**10.32**
**Reader seats.** Number of seats for readers in outlet. Do not include public access computers as reader seats.

**10.33**
**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.

**10.34**
**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.

**10.35**
**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.

**10.36**

**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.

10.37
**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

10.38
**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.

10.39
**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

10.40
**Wi-Fi.** Is Wireless Internet access is available at this location at no charge to patrons? Y = Yes; N = No