

**Oklahoma  
Department of Libraries Annual Report 2016  
Instructions**

**A. LIBRARY DATA**

|              |                                       |   |
|--------------|---------------------------------------|---|
| A1           | Library Name                          | This is the legal name of the Library.  |
| A2           | County                                | This is the county where the Library is physically located.   |
| A3           | Type                                  | Either PL for public or SY for system   |
| A4           | Mailing Address                       | This is the address where the Library receives its mail.  |
| A5           | Zip Code of Mailing Address           | This is the standard five-digit postal zip code where the Library receives its mail.  |
| A6           | Street Address                        | This is the complete physical street address for the Library. Note: Do not report a post office box or general delivery.  |
| A7           | City                                  | This is the city or town in where the Library is located.   |
| A8           | Zip Code of Street Address            | This is the standard five-digit postal zip code for the street address of the Library.  |
| A9           | Phone Number                          | This is the telephone number of the Library including area code. Report telephone number without spacing or punctuation.  |
| A10          | Fax Number                            | This is the telephone number of the Library's fax machine. Report without spacing or punctuation.   |
| A11          | Toll Free Number                      | If you have one, please enter. If not, enter N/A  |
| A12          | Director or Branch Head Email Address | This is the email address for the Director or Branch Head.  |
| A13          | Library website address               | Please give the full url with either "www" or "http:/" If no website, please enter N/A  |
| A14          | Legal Service Area Population         | The number of people in the geographic area for which a public library has been established to offer services and from which (or on behalf of which) the library derives revenue, plus any areas served under contract for which the library is the primary service provider. For systems this is all county(s) population. For Branches, please indicate your own self-defined service area if you have done this. Note: The determination of this population figure shall be the responsibility of the state library agency. This population is based on the most recent official US Census population estimates. |
| A14a         | County(s) Population                  | Derived from the latest US Census population estimates for the county or counties the library or system serves.   |
| A15          | County(s) Square Mileage Area         | Derived from the latest US Census figures for the county or counties the library or system serves.  |
| A16          | Service Without Charging              | Yes or No. The Library serves all population that resides in the county without charging.   |
| A17          | If No, Describe                       | Please tell us who you charge, how much and the time frame which the use charge covers – one time, annually, 3 years, etc.  |
| A18          | Director                              | Name of Director and Library Director certifies that all information is correct.  |
| A19/<br>A19a | Person Completing Report              | Include the first and last name of the person responsible for filling out this report and their email address.  |
| A20          | City Manager or Mayor                 | Please indicate which when you give the name such as Donna Jones, City Manager or Dwayne Wayne, Mayor. Systems input n/a  |
| A21          | Number of Branches                    | A branch library is an auxiliary unit of an administrative entity which has at least all of the following:<br><ol style="list-style-type: none"> <li>1. Separate quarters;</li> <li>2. An organized collection of library materials;</li> <li>3. Paid staff; and</li> <li>4. Regularly scheduled hours for being open to the public</li> </ol>  |

|             |  |  |
|-------------|--|--|
| A22         | Number of Bookmobiles                                  | A bookmobile is a traveling branch library. It consists of at least all of the following:<br><ol style="list-style-type: none"> <li>1. A truck or van that carries an organized collection of library materials;</li> <li>2. Paid staff; and</li> <li>3. Regularly scheduled hours (bookmobile stops) for being open to the public</li> </ol> Note: Count the number of vehicles in use, not the number of stops the vehicle makes |
| A23         | Number of Other Outlets                                | A regularly rotated collection/donation of materials in non-staffed locations such as nursing homes, jails, offices, etc. In State Note field, please indicate where and how often the collection is rotated/refreshed.  |
| A24         | Square Footage of Library                              | Only space actually used by the library should be included. If the library shares space in a building with other agencies, only the area occupied by the library should be measured. If the library runs the literacy program include this space. For systems give the square footage of the outlet that houses administration. <b>This is a critical figure for Category 2 Erate requests. Please measure if unsure.</b>          |
| A25         | Do you have meeting rooms?                             | Yes or No  |
| A25a        | Capacity of Room(s)                                    | Please indicate the room capacity for each room divided by a semi colon such as 4; 12; 12; 50; 200 which translates to a small group study room for 4; 2 board meeting type rooms that seat 12; 1 large room of 50; and one auditorium type room of 200.   |
| A26         | Year Built   | If you do not know the exact year the building was built, please provide an estimate.  |
| A26a        | Year of Last Remodel                                   | A remodel may including adding space or may just be retrofitting for better electrical, reconfiguring shelving, or any major undertaking that may disrupt library service.   |
| A27         | House in building owned or maintained by local gov't   | A public library is open to the public on a regular schedule in a building that is owned and/or maintained by a local government entity according to the Rules and Regulations for State Aid Grants to Public Libraries Definition of a Public Library #5.   |
| A28         | Building Renovation                                    | Renovation may including adding space or may just be retrofitting for better electrical, reconfiguring shelving, or any major undertaking that may disrupt library service. If you answer "Yes" to this question, the Capital Income and Capital Expenditures information should be reported. Only report projects completed by June 30, 2016.   |
| A29         | Total amount spent on building maintenance and/or rent | Please give a dollar estimate if you do not have an exact amount or indicate n/a.  |
| A30/<br>A31 | Building Maintenance and/or Rent Paid By               | If Other is selected a dollar amount must be input in the <i>Total amount spent on building maintenance and/or rent</i> . If City, County, System are selected, please give your best guess or leave zero.   |
| A32         | U.S. Congressional District                            | This is the US District you indicated last year as your district.  |
| A32a        | Yes/No U.S. Congressional District                     | Yes correct or No not correct as reported last year.   |
| A32b        | If No, Give District #                                 | Please give us the correct US Congressional District number.   |
| A33         | Oklahoma House District                                | These are the House district(s) you indicated the library serves last year; the D stands for Democrat and the R stands for Republican.   |
| A33a        | Yes/No Oklahoma House District                         | Yes correct or No not correct as reported last year.   |
| A33b        | If No, Give District #                                 | If you have multiple districts, please separate with semicolons such as H12; H22; H34 - it is not necessary to give party affiliation.   |

|      |                                 |   |
|------|---------------------------------|---|
| A34  | Oklahoma Senate District        | These are the Senate district(s) you indicated the library serves last year; the D stands for Democrat and the R stands for Republican. |
| A34a | Yes/No Oklahoma Senate District | Yes correct or No not correct as reported last year.  |
| A34b | If No, Give District #          | If you have multiple districts, please separate with semicolons such as S12; S22; S34 - it is not necessary to give party affiliation.  |

## B. STATE AID

Don't forget you need to report how you spent your state aid in 2 places - on the State Aid section and on the Expenditures section. We ask for more specifics on the state aid page so we can report exactly how state aid was spent to the state legislature. State aid must be encumbered by July 30. If you received your 10% holdback before June 30, please report it as state aid income. If after July 1, please report it next year.

This is only the amount of state aid you spent – not the total you may have spent. For example you spent \$2000 on summer reading programs but only used \$500 in state aid

### Federal Definition of Age Groups

- Children are birth to age 11
- Young Adults/Teens are ages 12-17
- Adults are age 18 to death (ha)

**If there is not a Young Adult category for the item then the federal definition says count them as Adults**

|     |                                       |  |
|-----|---------------------------------------|--|
| B1  | Number of Reference Books             |  |
| B2  | Reference Book Cost                   |  |
| B3  | Number of Childrens Books             |  |
| B4  | Childrens Book Cost                   |  |
| B5  | Number of Adult Books                 | See definition D4                                      |
| B6  | Adult Book Cost                       |  |
| B7  | Total Book Costs                      | (Sum of B2+B4+B6) auto calculated                      |
| B8  | Number of Periodical Subscription     | See definition D7                                      |
| B9  | Periodical Subscriptions Cost         |  |
| B10 | Number of A/V Materials               | See definition D13 (audio/visual)                      |
| B11 | A/V Cost                              |  |
| B12 | Internet Service Provider             | Please give the name of your Internet Service Provider |
| B13 | Internet Cost                         |  |
| B14 | # of Databases/Electronic Collections | See definition I27                                     |
| B15 | Database Cost                         |  |
| B16 | Number of Microfilm Materials         | See definition D12                                     |
| B17 | Microfilms Cost                       |  |
| B18 | Number of Ebooks                      | See definition I21                                     |
| B19 | Ebook Cost                            |  |
| B20 | Number of Other Materials             | See definition D19                                     |
| B21 | Other Costs                           |  |
| B22 | Total Non-Book Costs                  | (Sum of B9+B11+B13+B15+B17+B19+B21) auto calc          |
| B23 | Computer/Hardware                     | Include printers, tablets, scanners, 3D, etc.          |
| B24 | Total Cost of Computer/Hardware       |  |
| B25 | Computer Software                     | Licensed or purchased                                  |
| B26 | Total Cost of Computer Software       |  |
| B27 | Network Equipment                     | Indicate the total number of devices purchased.        |
| B28 | Total Cost of Network Equipment       |  |
| B29 | Automation Upgrade or Replace         |  |
| B30 | Total Cost of Automation              |  |

|     |  |   |
|-----|--|---|
| B31 | Automation and Equipment                   |   |
| B32 | Total Cost of Automation & Equipment       |   |
| B33 | Total Technology Costs                     | (Sum of B24+B26+B28+B30+B32) auto calc  |
| B34 | Type of Equipment/Furniture                | Copiers, die-cut machines, chairs, tables, shelving   |
| B35 | Number of Equipment/Furniture              |   |
| B36 | Cost of Equipment/Furniture                |   |
| B37 | Total Equipment/Furniture Costs            | (Sum of ALL B36s) auto calc   |
| B38 | Number of Childrens Programs               | Age under 12  |
| B39 | Total Children Program Cost                |   |
| B40 | Number of Adult/Teen Programs              | Age 12 and over   |
| B41 | Total Adult/Teen Program Cost              |   |
| B42 | Total Program Costs                        | (Sum of B39+B41)  |
| B43 | Number of Workshops                        | Travel for training or registration for online  |
| B44 | Costs of Workshops                         |   |
| B45 | Number of Additional Staff                 | May use state aid to pay for staffing   |
| B46 | Additional Staff Hours                     |   |
| B47 | Cost of Additional Staff                   |   |
| B48 | Specify Other Expenses                     | See definition 23   |
| B49 | Number of Other Expenses                   |   |
| B50 | Cost of Other Expenses                     |   |
| B51 | Total Other Expenses                       | (Sum of ALL B50s) auto calc   |
| B52 | Total State Aid Expenses                   | (Sum of B7+B22+B33+B37+B42+B44+B47+B51) auto calc   |
| B53 | Comments to Legislature on State Aid Value | Comments are critical to your legislator and your funding. ODL shares your comments to "tell-the-story" of state aid appropriations. ODL believes the legislature wants to know specifically how state aid and/or the statewide databases have helped your library. |

### C. INCOME

Money received for the regular, ongoing operation of the library, which includes personnel, library materials, supplies and utilities.

|         |                    |   |
|---------|--------------------|---|
| C1.     | City Funds         | The amount budgeted to the library for FY2016 by the community, district or region of the public library. Do NOT include the value of any contributed or in-kind services, any capital income, any supplemental or emergency funding allocated to the library by the city or town during FY2016 and the value of any gifts, donations, fines or fees. |
| C2      | County Funds       | Any money allocated to the library by the county board of commissioners for countywide library services. If you are a school/public library, the amount of funding from the school district should be entered here.   |
| C3      | Total Local Funds  | (Sum C1 +C2) auto calc  |
| C4 - C5 | State Grants       | Funds received from state agencies including ODL's Literacy Office, the Arts & Humanities Council or the state Departments of Agriculture or Commerce, etc. This does NOT include LSTA grants administered by ODL.  |
| C6      | Total State Grants | (Sum of all C5s) auto calc  |
| C7 - C8 | LSTA Grants        | List all LSTA (grants from ODL) funds.  |
| C9      | Total LSTA Grants  | (Sum of all C8s) auto calc  |
| C10     | Local Funds        | Auto fill from C3   |
| C11     | State Aid          | Auto fill from B52  |
| C12     | State Grants       | Auto fill from C6   |
| C13     | LSTA Grants        | Auto fill from C9   |

|     |                       |   |
|-----|-----------------------|---|
| C14 | Other Federal         | Erate funds – if your library received a reimbursement check because of the Erate and the money went into the library budget in addition to city funds already allocated, report it here. Other examples of federal funding are Federal Department of Education literacy grants or grants from the National Endowment for the Humanities. Only actual money received by the library should be reported. Therefore, do NOT report Job Corps, VISTA or similar programs if another agency pays their salaries.  |
| C15 | Other City            | Any one-time supplemental or emergency funding allocated to the library by the city that is not a capital expense.  |
| C16 | Other Collected       | Report income such as gifts, donations, fines, fees, copying and fax receipts, etc., if funds received are for library use (not if these funds go into the city general fund.) Include Friends money given to the library to purchase something. Do NOT include Friends money if the Friends purchase “something” and give the purchased item(s) to the library. Report foundation and gift funds received for building projects and other major one-time expenses under Capital. If the foundation and gift funds are used as part of your operating budget for books, utilities, programs, etc., report funds here as Income and also under Expenditures. |
| C17 | Carryover (Sum of F1) | This is income you were able to keep from last year's funds whether it be state aid, city budget, foundation/gift funds, etc. This number is auto-filled from your Carryover Kept By Library (F1) that was reported last year.  |
| C18 | Total Income          | (Sum of C10 to C17) auto calc   |

#### D. EXPENDITURES

##### Federal Definition of Age Groups

- Children are birth to age 11
- Young Adults/Teens are ages 12-17
- Adults are age 18 and up

**If there is not a Young Adult category for the item then the federal definition says count them as Adults**

|         |                  |  |
|---------|------------------|--|
| D1      | Staff Salaries   | This amount should be the salaries for all library staff including plant operation, security and maintenance staff if paid from the library budget. Include salaries before deductions, but exclude "employee benefits." Do not include the salaries of Job Corps, VISTA or similar workers if their salaries are paid by another agency   |
| D2      | Benefits & Taxes | Benefits paid and accruing to employees in addition to salaries regardless of whether the benefits or equivalent cash options are available to all employees. These benefits may include FICA, Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, workman's compensation, tuition and housing benefits. |
| D4 - D5 | Books            | Young Adult books should be counted as Adult books with the federal definition of Young Adult as ages 12-17. E-books are reported as electronic materials D16/D17 below.   |
| D6      | Total Books      | (Sum of D4 +D5) auto calc  |
| D7 - D8 | Serials          | Subscription costs paid by the library for hardcopy periodicals, magazines, newspapers, annuals, yearbooks, etc.   |
| D9      | Total Serials    | (Sum of D7+D8) auto calc   |
| D12     | Total Microfilm  | Film containing microphotographs of a newspaper, catalog, or other document.   |

|              |                               |   |
|--------------|-------------------------------|---|
| D13          | Adult Audio-Visual            | Books-on-tape or CD, music cassettes or CDs and videos on tape or DVD. For federal definition purposes anything for ages 12 and over is considered adult. Do not include electronic audio - this is reported under D16 adult electronic materials.  |
| D14          | Juvenile Audio-Visual         | Books-on-tape or CD, music cassettes or CDs and videos on tape or DVD. For federal definition purposes anything under age 12 is considered juvenile. Do not include electronic audio - this is reported under D17 Juvenile electronic materials.  |
| D15          | Total Audio-Visual (A/V)      | (Sum of D13+D14) auto calc  |
| D16          | Adult Electronic Materials    | Electronic books, music, video, magazines, and databases are reported here. Examples are Overdrive, Ancestry.com, Freegal, and Flipster just to name a few. The data can be accessed by computer, Internet, or e-book reader. Include equipment expenditures that are inseparably bundled into the price of the product. Exclude bibliographic records used to manage the collection (automation system) and computer software used only by staff.  |
| D17          | Juvenile Electronic Materials | Electronic books, music, video, magazines, and databases are reported here. The federal definition of "juvenile" is under 12 years of age. If the product includes all ages report as adult. Examples are TumbleBooks, Sesame Street, and Disney just to name a few. The data can be accessed by computer, Internet, or e-book reader. Include equipment expenditures that are inseparably bundled into the price of the product.   |
| D18          | Total Electronic Materials    | (Sum of D16+D17) auto calc  |
| D19 -<br>D20 | Other Materials               | Include all expenditures for circulating materials not reported above. These may include multimedia kits, games, toys, art prints, tools, etc.  |
| D21          | Total Other Materials         | (Sum of D19+D20) auto calc  |
| D22          | Total Collection              | (Sum of D6+D9+D12+D15+D18+D21) auto calc  |
| D23          | Other                         | Examples of other expenses are post office boxes, utilities, building insurance, travel, postage, office supplies, paper, printer ink, book covers, etc., paid out of the library budget.   |
| D24          | Furniture/Equipment           | Include expenditures for all furniture and equipment purchased if they are NOT capital expenditures. As a rule of thumb, if the furniture/equipment are purchased with a special, one-time appropriation, it is a capital expenditure and should be reported as Capital Income/Expenditures. If the furniture/equipment are purchased using the library's regular operating funds, it is an operating expense and should be reported here. E-book readers, computers, tablets, copiers, etc. are included here.   |
| D25          | Electronic Access             | Electronic Access: Include expenditures for services provided by bibliographic utilities, networks, consortia and commercial services. Report all fees and usage costs associated with such services as OCLC, internet service providers (ex: OneNet), telecommunication costs used only for internet access or electronic document delivery. Include computer hardware/software (automation system) used to support library operations, whether purchased or leased, ONLY if this is an operating expenditure. If your computer hardware/software is a one-time capital income/expenditure, report it as Capital |
| D26          | Total Misc                    | (Sum of D23 to D25) auto calc   |
| D27          | Total Expenditures            | (Sum of D3+D22+D26) auto calc   |

## E. CARRYOVER

|    |                       |   |
|----|-----------------------|---|
| E7 | +Total Income         | Auto-filled from calculated amount C18  |
| E8 | -Total Expenses       | Auto-filled from calculated amount D27  |
| E9 | This Year's Carryover | This Year's Carryover equals total unexpended funds ie Total Income C18 minus Total Expenditures D27. Auto calculated |

## F. MAINTENANCE OF EFFORT

|     |   |  |
|-----|---|--|
| F1  | City/County Carryover Funds Kept By Library | Budgeted income received in FY2016 that was not spent in FY2016 and the library is allowed to "carryover" that money and spend it next year in FY2017. The sum of F1 and F1a will autofill in income C17 next year.  |
| F1a | Other Carryover Funds Kept by Library       | Non-City/County funds such as state aid, foundation grants, bequests. etc. received in FY2016 that was not spent in FY2016 and the library will "carryover" that money and spend it in coming years. The sum of F1 and F1a will autofill in income C17 next year.  |
| F2  | Carryover Returned to City                  | Budgeted income received in FY2016 that was not spent in FY2016 and the library must return to the city – the library is NOT allowed to "carryover" that money and spend it next year in FY2017. This amount will be deducted from C3 Total Local Funds to determine Maintenance of Effort F3  |
| F3  | Maintenance of Effort (MOE)                 | The amount of income that must be matched or exceeded by the city/county (local funds) next year in FY2017 July 1, 2016 – June 30, 2017. This figure is calculated by subtracting city funds that the library returned to the city (F2) from C3 Total Local Funds. A MOE Note field has been added to allow the library or ODL to give an explanation for why the MOE was not matched. If the amount is lower, the library will need to write an appeal letter explaining why. |

## G. CAPITAL INCOME

|    |                      |  |
|----|----------------------|--|
| G1 | Bonds/Appropriations | Income received from a city or county bond issue approved by the electorate or an appropriation of city/library funds for a specific capital improvement. Annual city appropriations for normal library operation and services should not be included. <b>Please report any ad valorem funds used for construction or remodeling here if project was completed by June 30.</b> |
| G2 | Federal              | Funds received from Federal sources. This money was then spent as a Capital Expenditure. If spent on general operating costs, report under Income-Other Federal C14 Income and Expenditures.   |
| G3 | State Grants         | List any construction funds received through state funds. One example is the state REAP program.   |
| G4 | Other Grants         | Grants from local or national companies and foundations for building projects and other major one-time expenses. If the funds are used as part of your operating budget for books, utilities, programs, etc., report foundation funds under Income-Other Collected C16 and Expenditure.  |
| G5 | Donations            | Gifts and donations, such as Friends funds or bequests from estates for building projects and other major one-time expenses. If the funds are used as part of your operating budget for books, utilities, programs, etc., report gifts under Income-Other Collected C16 and as Expenditure.  |
| G6 | Other Income         | If funding does not seem to fit in any of the above categories, please include here and provide an explanation in the State Note field.  |
| G7 | Total Capital Income | G1-G6  |

## H. CAPITAL EXPENDITURES

|    |                                  |  |
|----|----------------------------------|--|
| H1 | Buildings New                    | Include funds for the acquisition of or additions to fixed assets such as building sites, new buildings and building additions, furnishings and shelving for new or expanded buildings and initial book stock. <b>Please report any ad valorem funds used for construction or remodeling here if project was completed by June 30.</b> |
| H2 | Buildings Remodeled              | Report funds for remodeling buildings, including attached fixtures such as carpet, lighting, painting and air conditioning, and new furnishings and shelving not reported as an operating expense.   |
| H3 | Motor Vehicles                   | Report funds used for purchase of cars, trucks, vans, and bookmobiles.   |
| H4 | Major Computers and/or Equipment | E-book readers, computers, tablets, copiers, etc. If funding was a major replacement for a new building or addition, please report here.   |
| H6 | Other Capital Expenditures       | If expenditure does not seem to fit in any of the above categories, please include here and provide an explanation in the State Note field.  |
| H7 | Total Capital Expenditures       | (Sum of H1 to H6)  |
| H8 | DELETED Capital Carryover        | Please REPORT ONLY Income and Expenditures completed by June 30.   |

## I. HOLDINGS

Federal Definition of Age Groups

- Children are birth to age 11
- Young Adults/Teens are ages 12-17
- Adults are age 18 and up

If there is not a Young Adult category for the item then the federal definition says count them as Adults

Books/Bound Serials/Etc.

**\*Systemwide will no longer be reported separately. Please report all figures as systemwide.**

|           |                                   |  |
|-----------|-----------------------------------|--|
| I1 - I2   | Adult and Juvenile Physical Units | Report the total of all cataloged printed books plus the number of volumes of bound magazines. Count unbound magazines as one unit for each year. If necessary estimate the number of titles held by multiplying the total number of units by 0.9.   |
| I3        | Total Bound Physical Units        | (Sum I1+I2) auto calc  |
| I7 - I8   | Added Adult/Juvenile              | Please give an estimate as to the number of units added.   |
| I9        | Total Bound Added                 | (Sum of I7+I8) auto calc   |
| I10 - I11 | Discarded Adult/Juvenile          | Please give an estimate as to the number of units discarded.   |
| I12       | Total Bound Discarded             | (Sum of I10+I11)   |
| I13       | Subscription Physical Units       | Report the number of current print serial subscriptions, including duplicates, for all outlets. Examples of serials are periodicals (magazines), newspapers, annuals, some government documents and some reference tools.  |
| I17       | Total Print Physical Units        | (Sum of I3+I13) auto calc  |
| I19       | Total Print Added                 | (Sum of I9) auto calc  |
| I20       | Total Print Discarded             | (Sum of I12) auto calc   |
| I21 - I22 | E-Books                           | E-books are digital documents, licensed or not, which can be seen like a printed book. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired. E-books packed as a unit – multiple titles on a single e-book reader - and checked out as a unit are counted as one unit. If the e-book reader has 10 titles on it, count all ten titles. Check with Overdrive or your ebook vendor if unsure. |

|           |                               |   |
|-----------|-------------------------------|---|
| I27 – I28 | Databases                     | A database is a collection of electronically stored data accessed with software. Typically the data is collected on a defined topic and can be issued on CD/DVD, diskette or via the Internet. Report the number of databases, locally mounted or remote, full-text or not, for which temporary or permanent access rights have been acquired. Report the number of database licenses – subscription or one-time purchase. Each database is counted individually even if access to several databases is supported through the same vendor interface. EX: EBSCO is the vendor interface and provides numerous databases such as Medline, Business Source Elite, MasterFile Premier, etc. and each database should be counted individually. Only count databases paid for by the library or through a consortia agreement; do not include the statewide databases such as EBSCO and Britannica since we have already calculated them in I28 |
| I29       | Name of Licensed Databases    | If you purchase multiple databases, please just provide the link or url to your database list on your website. A database is a collection of electronically stored data accessed with software. Typically the data is collected on a defined topic and can be issued on CD/DVD, diskette or via the Internet. Report the name(s) of databases, locally mounted or remote, full-text or not, for which temporary or permanent access rights have been acquired. Each database is counted individually even if access to several databases is supported through the same vendor interface. EX: EBSCO is the vendor interface and provides numerous databases such as Medline, Business Source Elite, MasterFile Premier, etc. and each database should be named individually. Only name databases paid for by the library or through a consortia agreement; do not include the statewide databases.   |
| I30       | Sum DB/Electronic Collections | (Sum of I27+I28) auto calc  |
| I35       | Audio Physical Units          | Number of Adult and Juvenile audio recordings - Books-on-tape or CD, music cassettes or CDs.  |
| I39       | Downloadable Audio Units      | These are downloadable electronic files on which sounds (only) are stored and that can be played back electronically. Report the number of titles. Report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC.)  |
| I40       | Video Physical Units          | Videos on tape or DVD.  |
| I44       | Downloadable Video Units      | These are downloadable electronic files on which moving pictures (video) are recorded. Electronic playback reproduces pictures using a television receiver, computer monitor or video-enabled mobile device. Report the number of titles. Report only items the library has selected as part of the collection and made accessible through the library's catalog.   |

## J. OUTLET DATA

|         |                      |  |
|---------|----------------------|--|
| J1 - J2 | FSCSKEY and FSCS_SEQ | This is the identification code assigned by NCES. Outlets are assigned the same FSCS ID as the administrative entity to which they belong, with a unique three-digit suffix added to distinguish each outlet.  |
| J3      | LIBID                | This is the state-assigned identification code for the outlet.   |
| J4      | Outlet Name          | This is the official name of the outlet (main library, branch library or bookmobile).  |
| J5      | Street Address       | This is the complete street address or physical location of the outlet.<br><b>Note:</b> Do not report a post office box or general delivery. For a bookmobile that operates from an administrative entity, branch, or central library, report the address of the administrative entity, branch or central library from which it operates. For a bookmobile that is itself the administrative entity, report the address where the bookmobile is parked at night. |

|     |  |   |
|-----|--|---|
| J6  | City                                   | This is the city or town in which the outlet is located.  |
| J7  | Zip                                    | This is the five-digit postal zip code for the street address of the outlet.  |
| J8  | County                                 | County where the branch is physically located.  |
| J9  | Phone                                  | This is the telephone number of the branch Library including area code.<br>Report telephone number without spacing or punctuation.  |
| J10 | Outlet Type Code                       | <p>Supplied by the State Library. Do not change unless adding a new outlet. An outlet is a unit of an administrative entity that provides direct public library service.</p> <p>BM—Books-by-Mail Only. A direct mail order service which provides books and other library materials. Books-by-mail typically serves rural residents, the disabled, the homebound, and others without access to another type of public library outlet. Requests for materials are usually received by mail and by telephone only. Only books-by-mail services that are housed separately from any other type of direct public service outlet (that is, central library, branches, or bookmobiles) should be coded here.</p> <p>BR—Branch Library. A branch library is an auxiliary unit of an administrative entity which has at least all of the following:<br/>1. Separate quarters; 2. An organized collection of library materials; 3. Paid staff; and 4. Regularly scheduled hours for being open to the public</p> <p>BS—Bookmobile(s). A bookmobile is a traveling branch library. It consists of at least all of the following: 1. A truck or van that carries an organized collection of library materials; 2. A paid staff; and 3. Regularly scheduled hours (bookmobile stops) for being open to the public<br/><b>Note: A separate outlet record may be created for each bookmobile. You may wish to create separate outlet records for individual bookmobiles if (1) they have different addresses and/or (2) they have different Metropolitan Status Codes. Alternatively, a bookmobile outlet record may include more than one bookmobile.</b></p> <p>CE—Central Library. This is one type of single outlet library (SO) or the library which is the operational center of a multiple-outlet library (MO or MA). Usually all processing is centralized here and the principal collections are housed here. Synonymous with main library.<br/><b>Note:</b> Each administrative entity may report either no central library or one central library. No administrative entity may report more than one central library. If you wish to identify a central library in the outlet file, identify the library with the largest collection as the central library and report all others as branches. Where there are several co-equal outlets and no principal collection, report all such outlets as branches, not central libraries.</p> |
| J11 | Square Footage                         | Provide the area, in square feet, of the public library outlet (central library or branch). Report the total area in square feet for each library outlet (central library or branch) separately. 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. <b>This is a critical figure for Category 2 Erate requests.</b> Please measure if unsure.   |
| J12 | Number of Bookmobiles in Outlet Record | <b>The number of bookmobiles in the bookmobile outlet record. Note: A bookmobile outlet record may include one or more bookmobiles. Complete this data element only if the outlet record is of the type BS—Bookmobile(s).</b> A bookmobile is a traveling branch library. It consists of at least all of the following:<br>1. A truck or van that carries an organized collection of library materials;<br>2. A paid staff; and<br>3. Regularly scheduled hours (stops) for being open to the public.<br>Count vehicles in use, not the number of stops the vehicle makes.  |

|     |                                   |  |
|-----|-----------------------------------|--|
| J13 | Public Service Hours Per Year     | <p>This is the number of annual public service hours for outlets (reported individually by central, branch, bookmobile and Books-by-Mail Only)</p> <p>Note: Include the actual hours open for public service for centrals, branches, and bookmobiles, and Books-by-Mail Only. <b>For each bookmobile, count only the hours during which the bookmobile is open to the public.</b> For administrative entities that offer ONLY books-by-mail service, count the hours that the outlet is staffed for service. Minor variations in public service hours need not be included. Extensive hours closed to the public due to natural disasters or other events should be excluded from the count.</p>   |
| J14 | Number of Weeks a Library is Open | <p>This is the number of weeks during the year that an outlet was open to the public.</p> <p>Note: Include the number of weeks open for public service for Centrals, Branches, Bookmobiles, and Books-by-Mail Only. For each bookmobile, count only the weeks during which the bookmobile is open to the public. For administrative entities that offer ONLY books-by-mail service, count the weeks that the outlet is staffed for service. The count should be based on the number of weeks that a library outlet was open for half or more of its scheduled service hours. Extensive weeks closed to the public due to natural disasters or other events should be excluded from the count. Do not calculate based on total number of service hours per year at the outlet level. For example, by dividing total hours by 52 (weeks). Round to the nearest whole number of weeks. If the library was open half or more of its scheduled hours in a given week, round up to the next week. If the library was open less than half of its scheduled hours, round down.</p> |

**K. SCHEDULE OF HOURS**

**\*Systemwide will no longer be reported separately. Please report all figures as systemwide.**

|    |                                     |  |
|----|-------------------------------------|--|
| K1 | Hours Open per Week                 | This should be the <b>minimum</b> number of hours per week the library is open during the year. For example, if your library is open 52 hours when school is in session (open 4 hours on Sunday) but only open 48 hours in the summer, report 48 hours.  |
| K2 | Hours after 5pm - M-F               | This should be the <b>maximum</b> number of hours per week the library is open after 5:00 p.m. Monday – Friday.  |
| K3 | Hours SAT, SUN                      | This should be the <b>maximum</b> number of hours per week the library is open Saturday and Sunday. For example, if your library is open 52 hours when school is in session (open 8 hours on Saturday and 4 hours on Sunday for 12 hrs) but is only open 48 hours in the summer with no Sunday hours, report 12 hours Sat/Sun not 8 Sat summer only. |
| K4 | Days Closed for Holidays            | Number of days closed  |
| K5 | Weeks Open per Year                 | This is the number of weeks open to the public. This will normally be 52 unless you are closed for construction, natural disaster, etc.  |
| K6 | Total Number of Hours Open Annually | This is automatically calculated Hrs Wk X Weeks Open Per Year.   |

Click [Here](#) to complete Regular and Summer Daily Hours

| Days of Week | Opening Time | Closing Time |
|--------------|--------------|--------------|
| Monday       | K13a.        | K13b.        |
| Tuesday      | K13c.        | K13d.        |

|  |              |              |
|--|--------------|--------------|
| Wednesday  | K13e.        | K13f.        |
| Thursday   | K13g.        | K13h.        |
| Friday   | K13i.        | K13j.        |
| Saturday   | K13k.        | K13l.        |
| Sunday   | K13m.        | K13n.        |
| Total Regular Library Hours Open per Week            |              |              |
| Total Regular Hours Library Open after 5:00 p.m. M-F |              |              |
| Total Regular Hours Library Open Saturday and Sunday |              |              |
| <b>Summer Hours</b>                                  |              |              |
| Summer Days of Week                                  | Opening Time | Closing Time |
| Monday   | K14a.        | K14b.        |
| Tuesday  | K14c.        | K14d.        |
| Wednesday  | K14e.        | K14f.        |
| Thursday   | K14g.        | K14h.        |
| Friday   | K14i.        | K14j.        |
| Saturday   | K14k.        | K14l.        |
| Sunday   | K14m.        | K14n.        |
| Total Summer Library Hours Open per Week             |              |              |

**L. REFERENCE/CIRCULATION**

**\*Systemwide will no longer be reported separately. Please report all figures as systemwide.**

|    |                          |  |
|----|--------------------------|--|
| L1 | Is Library Service Free? | The library offers free library service if residents of the community can obtain library cards and use the library services without charge. Overdue fines, copying fees, etc. can be charged. To receive percentage of city and county population and square mileage state aid funds, free library service must be offered countywide. |
|----|--------------------------|--|

|     |   |  |
|-----|---|--|
| L2  | Total Reference Transactions per Week / <b>Systemwide</b> | <p>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.</p> <p>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.</p> <p>Information sources include (a) printed and non-printed material; (b) machine-readable databases (including computer-assisted instruction); (c) the library's own catalogs and other holdings records; (d) other libraries and institutions through communication or referral; and (e) persons both inside and outside the library.</p> <p>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.</p> <p>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.</p> <p>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?"</p> <p>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.</p> |
| L2b | Annual Reference Transactions                             | (Sum of L2*52) auto calc   |
| L3  | Annual Reference Transactions per Capita                  | (Sum of L2B/A14) auto calc   |
| L4  | Adult Circulation   | <p>The total adult circulation of all library materials of all types, including renewals. This <b>used to</b> include electronic materials circulation. But this is NOW just PHYSICAL materials circulation since we have a separate circulation for electronic circulation <b>L8</b>. Adult and teen materials are items for those over the age of 12. Note: Count all materials in all physical 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. <b>Systemwide</b></p>  |

|     |   |   |
|-----|---|---|
| L5  | Juvenile Circulation                              | The total juvenile circulation of all library materials of all types, including renewals. This <b>used to</b> include electronic materials circulation. But this is NOW just PHYSICAL materials circulation since we have a separate circulation for electronic circulation <b>L8</b> . Children's materials are items for those under the age of 12. Note: Count all materials in all physical 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. <b>Systemwide</b>   |
| L6  | Total Circulation (Now calculated from L4+L5+L8)  | The total annual circulation of all library materials of all types, including renewals. This includes your electronic materials circulation. 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.   |
| L7  | Annual Physical+Electronic Circulation per Capita | (Sum of L6/A14)   |
| L8  | Circulation of Electronic Materials               | The total annual circulation of all electronic materials – <b>Adult and Juvenile</b> . Examples are e-books and downloadable electronic video and audio files. Please report juvenile electronic circulation below in L8a. Electronic Materials are materials that are distributed digitally online and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Electronic materials packaged together as a unit and checked out as a unit are counted as one use. Include circulation only for items that require a user authentication, and have a limited period of use.  |
| L8a | Circulation of Children's Electronic Materials    | The total annual circulation of all juvenile electronic materials. Examples are e-books and downloadable electronic video and audio files. This is needed to accurately report to the feds your physical L5 and electronic L8a circulation for a total circulation of juvenile materials (under age 12.)  |
| L9  | Successful Retrieval of Electronic Information    | Repurposed for new data element<br>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.  |
| L10 | Total Electronic Content Use                      | Repurposed for new data element Total ecirc of ematerials + use of electronic information (Sum L8+L9) auto calc   |
| L11 | Total Collection Use                              | Repurposed for new data element (Sum L6+L9) auto calc / Total physical and electronic circulation plus retrieval of electronic information  |
| L13 | Annual Library Visits                             | This is the total number of persons entering the library for whatever purpose during the year. This is a federally gathered statistic and must be answered. Traditionally Oklahoma has only asked for library visits once every four years as your state aid survey. If you do not have a door counter, add up the number of persons who came into the library during one week and multiply this number by 52 (number of weeks in the year.) Then add the number of people who attended all programs during the year. Please take into account the number of reported annual internet users too but don't overinflate for an estimated grand total. <b>Systemwide</b> |

## M. BORROWERS

|    |                               |   |
|----|-------------------------------|---|
| M1 | Adult Registered Borrowers    | Ages 12 and over who have a library card and/or access to checkout the collection. Do not include guest cards for internet use. |
| M2 | Juvenile Registered Borrowers | Ages 11 and under   |
| M3 | Total Registered Borrowers    | (Sum M1+M2) auto calc   |
| M4 | Number of Family Cards        | One card for every member of the family rather than one card per person. If you do not have family cards, put zero here.        |
| M5 | Re-Register?                  | Borrower information should be updated at least once every 3 years. Answer YES or NO.   |
| M6 | If No, please explain         | If No, please explain how records are kept current.   |

## N. PROGRAMS/INTERLIBRARY

|          |                                   |  |
|----------|-----------------------------------|--|
| N1 - N2  | Summer Children                   | Count Children Programs only for July /August 2015 and May/June 2016. Adults attending children's programs should Not be included in the attendance. Children are considered under age 12. Each time an event is held counts as a program. If you have a Summer program and it is held every Tues and Thurs for 4 weeks that would be 8 programs.                              |
| N3 - N4  | Other Children                    | Report the number of programs and total attendance for all non-Summer Reading children's programs in FY2016 July - May.  |
| N5-N6    | Adult                             | Report the number of programs and total attendance for all Adult programs in FY2016 July - June. If you have an All Ages program please include in only one place, children or adult, depending on the main intent of the program. EX: Family Fun Night would be Adult and Halloween Party would be Children. Leave a Note in the the State Note field to Explain if possible. |
| N7 - N8  | Summer Teen                       | Count programs specifically for teens 12-17 only for July /August 2015 and May/June 2016. Adults attending teen programs should Not be included in the attendance.   |
| N9 - N10 | Teen Program                      | Report the number of programs and total attendance for all non-Summer Reading teen programs in FY2016 July - May.  |
| N11      | Total # of Programs               | (Sum of N1,N3,N5,N7,N9) auto calc  |
| N12      | Total Program Attendance          | (Sum N2,N4,N6,N8,N10) auto calc  |
| N13      | Program Attendance per Capita     | (Sum of N12/A14) auto calc   |
| N14      | Types of Video Conferencing Uses  | Please input what type of programs, meetings, or events you used your video conferencing for this year July - June such as OLA Program meetings; OLA Legislative; health fair; heart support group; yoga; author visit; etc.   |
| N14a     | Number of Video Conferencing Uses | Please input the total number of times you used your video conferencing this year July - June.   |
| N15      | Video Conferencing Attendance     | Please input the total number of people who attended a video conference event at your library this year July - June. Do not count remote participants.   |
| N16      | Loans TO Other Libraries          | The number of volumes (books, materials, etc.) loaned and unique periodical or paper information faxed or mailed to other libraries. Only count the loan once; renewals of the same loan are not counted.  |
| N17      | Borrowed FROM Other Libraries     | The number of volumes (books, materials, etc.) received from other libraries and the number of unique periodical or paper information faxed or mailed to your library for your library's customers. Only count the borrowing once; renewals are not counted.   |

## O. CE/INTERNET USE

|           |  |   |
|-----------|--|---|
| O1        | # of Staff                                 | Report the number of staff (systemwide) that went to at least one CE event. If a staff member went to 3 different CE events, this staff person is only counted once. Physical attendance is implied.  |
| O2        | # of Board                                 | Report number of board that went to at least one CE event. If a board member went to 5 different CE events, this board member is only counted once. Physical attendance is implied.   |
| O3        | Total CEs                                  | Report total number of DIFFERENT CE events attended by either staff or board (systemwide.) For example, if 5 staff and/or board went to the same CE event (e.g. OLA conference,) it counts as 1 CE activity.  |
| O5        | Does your library have internet access     | Yes or No   |
| O6        | Number of Internet Users Annually          | Report or estimate how many people access the Internet using library computers. Do not include staff use.   |
| O7 – O8   | Number of Internet Stations                | Report number of public and staff computers. <b>Systemwide.</b>   |
| O10       | Total Computers                            | (Sum O7+O8) auto calc   |
| O11       | Internet have WIFI?                        | Yes or No. This is Internet access through a wireless connection. Wireless is not a connection speed. Please check with your Internet provider if you do not know your Internet connection speed.   |
| O12       | Annual Wireless Sessions                   | Report the number of wireless sessions provided by the library wireless service annually. If you do not have access to this figure from your internet service provider or your router, you may estimate. Please leave a note in the State Note Field as to how you estimated this figure. |
| O13       | Type of Connection                         | Please select from the drop down list your connection speed/type. If select Other, fill out O14.  |
| O14       | Other (internet connection)                | Input the speed or type of Internet connection if not input in O13  |
| O15 - O16 | Does your library use an internet filter?  | Yes or No. Examples are Cybersitter, Bess, CleanFeed, DansGuardian, SafeSquid, SurfControl, Websense, SonicWALL, ZoneAlarm, N2H2  |
| O21 - O24 | Web page, Updated, Software & Hosted Where | Yes or No; Daily, Weekly, Monthly, Quarterly; FrontPage, Dreamweaver, WordPress; On what computer is your web site "housed" (Hosting is the business of housing, serving, and maintaining files for a web site)   |

## P. SALARIES AND BENEFITS

|          |                                     |  |
|----------|-------------------------------------|--|
| P1       | Beginning Librarian's Annual Salary | Enter the current ANNUAL starting salary for a reference librarian, branch manager, assistant director or if a one-person library, what the beginning salary would be for your position.   |
| P2       | Director's Current Annual Salary    | System or Library Director's annual salary   |
| P3       | Hourly Wage                         | Even if you are a salaried position, please indicate based on a 40hr work week (FTE) the hourly salary   |
| P4       | Director's Hours Per Week           | Enter the number of hours for which the director is paid. If the director is paid an annual salary and not hourly, please report 40 hours for fulltime.  |
| P5       | Director's Salary FLSA              | Auto calc to verify minimum wage is paid for hours worked. (P3*P4)*52  |
| P6 - P13 | Benefits                            | Please select either YES or NO IF the director and the staff have the option - they do not have to actually have them. If you are a one-person library, please enter NO for all staff. If you answered Yes, please input in the State Note field how many hours per week minimum does the employee have to work to receive benefits. |
| P14-P17  | Other Salaries                      | If you have these positions, please give the annual salary   |

## Q. EQUIPMENT

|     |  |   |
|-----|--|---|
| Q1  | Photocopier  | Yes or No   |
| Q2  | Microfilm/Fiche Reader/Printer   | Yes or No   |
| Q3  | How Many WiFi Netbooks, Laptops, Tablets Available for In-House Public Checkout? | In State Note field please indicate type of device and number of - such as 4 laptops, 2 Kindles, 1 iPad, etc.   |
| Q3a | How Many WiFi Netbooks, Laptops, Tablets Available for Home Public Checkout?     | In State Note field please indicate type of device and number of - such as 4 laptops, 2 Kindles, 1 iPad, etc.   |
| Q4  | Public Computers   | Number of hardwired computers for the public. You may include self-check stations here but do NOT include them as <b>internet computers (O7)</b>  |
| Q7  | Automation System  | Yes or No   |
| Q8  | Which Automation System  | Select from list. If not on list, please indicate in the State Note field the brand name of your automation.  |
| Q11 | Number of OPACS only   | OPAC stands for Online Public Access Catalog. OPACs are dumb terminals or thin clients that can ONLY be used with your automation system – no other computing can be done from this computer. |

## R. POLICIES/CATALOG

|     |   |   |
|-----|---|---|
| R1  | Library's Hours Conveyed to Community   | Various methods to publicize the library's hours include signs, newspaper articles, public service announcements on radio or television, appearances before community groups or events, and listing in the telephone directory.                           |
| R2  | Friends of Library Group                | Yes or No. If your library does have a Friends group or wants to start a Friends group, association with the statewide FOLIO (Friends Of the Library In Oklahoma) is very helpful. Contact ODL for more information on FOLIO or check out their web site. |
| R3  | Friends Contact Name and Phone/Email    | Contact information for your Friends group  |
| R4  | If No, Has Library Ever Had Friends     | Yes or No   |
| R5  | Local Literacy Program                  | Yes or No. Please indicate if your library is working with a local literacy group. Contact ODL for more information on Literacy programs.   |
| R6  | Literacy Contact Name and Phone/Email   | Contact information for your Literacy group   |
| R7  | Written Statement of Purpose            | Yes or No. Often referred to as a mission statement. This is a state aid requirement.   |
| R8  | Year Last Reviewed                      | Your statement needs to be reviewed every 4 years according to state aid rules.   |
| R9  | Board Approved Policies                 | Yes or No. This is a state aid rule.  |
| R10 | Written Materials Selection Policy      | Another term for this is collection development policy. The policy should also include a procedure for customer comments on materials.  |
| R11 | Year Last Reviewed                      | Your statement needs to be reviewed every 4 years according to state aid rules.   |
| R12 | Minimum Wage Paid at Least \$7.25 an hr | Yes or No   |

|         |                                      |  |
|---------|--------------------------------------|--|
| R13     | Fair Labor Act Observed              | Yes or No. In addition to minimum wage, the Fair Labor Standards Act includes such key provisions as child labor regulations, record keeping and overtime.   |
| R14     | Collection Evaluated and Maintained  | Yes or No. This is a state aid rule.   |
| R15     | Automated Selection/Processing       | A company that assists the library with online ordering, collection development, standing orders, MARC records and/or shelf ready materials (spine labels, book jackets, etc.) If Yes, please enter the name(s) of your vendor(s).   |
| R16     | Is Catalog Available on the Internet | Yes or No. Which means, can someone use the Internet from anywhere in the world to look at just your library catalog.  |
| R17-R18 | Is Collection Fully Cataloged        | Yes or No. For automated catalogs, public access terminals with author, title and subject records are required, with MARC records recommended. Consider your collection fully cataloged if purchased items are cataloged - do not worry about donations or a few weeks worth of backlog. |

### S. PLANNING

|           |                                     |   |
|-----------|-------------------------------------|---|
| S1-S3     | Does Library have a Long Range Plan | Yes or No. The State Aid Rules require all systems and libraries serving communities 10,000 population and over to have a written long range plan updated every three years. The written plan and updates must be submitted to ODL. |
| S4-S6     | Check One and create?               | Type of planning and yes or no to creating or revising your plan.   |
| S9        | BEN                                 | This is your federal Erate <b>Billed Entity Number</b> . If you have more than one BEN, please enter the main BEN and end it with a Y such as 83592Y.   |
| S10 - S11 | FCC#: and EIN/TIN#                  | Please give us your 10 digit FCC# ex: 0011701333 (applied for at www.fcc.gov) and your Employee Identification Number or Tax Identification Number (number can be gotten from your city ex: 73-6005411.)                            |

### T. Board Data

|         |  |  |
|---------|--|--|
| T1-T12  | January to December                      | Check the months the board meets   |
| T13-T16 | Board meeting time; week; day; frequency | Am/pm; 1 <sup>st</sup> -5 <sup>th</sup> week; Sun-Sat; Bimonthly, Monthly, Quarterly |
| T17     | Number of Board Members                  | Please input filled positions only   |

### U. STAFF

**\*Systemwide will no longer be reported separately. Please report all figures as systemwide.**

|    |                               |   |
|----|-------------------------------|---|
| U1 | Total Library Positions       | Total number of people that are paid from the library budget. Please include vacant positions. Ex: I have <b>1 director</b> (40 hrs), <b>3 librarians</b> (1@ 40 hrs and 2@ 29 hrs) and <b>2 circulation</b> staff (20 hrs each), <b>2 shelvers</b> (15 hrs each) and <b>1 vacant</b> (15 hr) shelving position. I have a total of 9 positions.   |
| U2 | Library Vacancies (positions) | Total number of unfilled positions for people paid from the library budget. Ex above I have 1 vacancy. If this vacant position is not budgeted, do not count  |
| U3 | Total FTEs                    | Report figures as of the last day of the fiscal year. <b>Include all positions funded in the library's budget</b> whether those positions are filled <b>or not</b> . 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 - <b>round to 2 decimals please.</b> (Sum U5+U6+U7+U8) |

|        |                |   |
|--------|----------------|---|
| U4     | Hired FTEs     | Example above 1 director + 3 librarians + 2 circ + 2 shelvers (40 + 40 + 29 + 29 + 20 + 20 + 15 + 15) = 208 staff hours a week divided by 40 = 5.2 FTEs   |
| U5     | Vacant FTEs    | Example above = 15hr vacant divided by 40 = 0.375 = <b>0.38 round to 2 decimals</b> If this vacant position is not budgeted, do not count.  |
| U6     | Librarian FTEs | 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. In my opinion, if your circulation staff also answer reference questions and provide reader's advisory I would count them as librarians. Using example above you would have director + 3 librarians + 2 circ (40 + 40 + 29 + 29 + 20 + 20) = 178 librarian hours divided by 40 = 4.45 FTE |
| U7     | MLS FTEs       | Librarians with master's degrees from programs of library and information studies accredited by the American Library Association. Director has an MLS works 40 hrs week divided by 40 = 1 FTE.  |
| U8     | Other FTEs     | All Other Paid Staff - This includes all other FTE employees paid from the reporting unit budget, including plant operations, security, and maintenance staff. 2 15 hr shelvers and 1 vacant 15 hr shelving position = 15 hr x 3 positions = 45 hrs divided by 40 = 1.125 = <b>1.13 round to 2 decimals</b>   |
| U9-U17 | Deleted        | Systemwide figures are now reported above in U1-U8  |

### Board Roster

Last Name; First Name; Address; City; Zip Code; Home Phone; Business Phone; Email Address; Position; Term Ends – **Position and Term Ends are critical fields. Board members should have defined terms of service.**

### Staff Roster

|                |  |
|----------------|--|
| Last Name:     |  |
| First Name:    |  |
| Title:         | unique to your organization  |
| Type:          | <p>select one:<br/>Following are the definitions from the Public Library Survey (federal statistics) for MLS, Librarian and Other.</p> <ul style="list-style-type: none"> <li>• <u>MLS</u>: Master's degree in Library Information Studies/ Science, etc.</li> <li>• <u>Librarian</u>: Persons who do paid work that requires training and skill in library work distinct from mechanical or clerical aspect. In plain English, if you are the library director or a reference/children's librarian without an MLIS, consider these positions Librarian.</li> <li>• <u>Other</u>: This includes all other paid staff including clerical, plant operations, security and maintenance. In plain English, if the staff's main responsibility is checkout, shelving, or exclusively computer technician, cleaning, etc., consider these positions</li> </ul> |
| Certification: | Yes or No  |
| Level:         | I-VII  |
| Year:          | Year first certified   |

|                                |   |
|--------------------------------|---|
| Education:                     | Indicate level of Education for each employee using the dropdown menu:<br>Some College<br>College Graduate<br>High School graduate or GED<br>Masters in Library (from an ALA accredited program)<br>Not a High School Grad or GED (such as a student worker)<br>Other Masters   |
| Attended Continuing Education? | Yes or No. This is a state aid rule for anyone working over 20 hours  |
| Hired This FY                  | Yes or No   |
| Hours Per Week                 | Report Hours Worked per Week (on a regular basis). If not a year-round employee, pro-rate the hours on an annual basis. For example: someone working 20 hours a week during the summer months is equivalent to an employee working 5 hours a week year-round. (20 hrs wk for 12 weeks = 240 hours. Divide 240 by the number of weeks in a year (52) and get 4.6 – round up to 5 hours.) |
| FTE                            | Full Time Equivalent (which is considered 40 hrs) number of hours worked a week divided by 40   |

## SURVEY

|                 |  |  |
|-----------------|--|--|
| 1a, 2a, 6a, 16a | Year Done  | This field will indicate which survey you are required to complete this year with 2016 auto-filled.  |
|                 | Policy Review<br><b>A-L</b>                            | Libraries serving populations <b>under 5,000</b> with city names beginning with <b>A-L</b> should report this information. According to state aid rules the written statement of purpose and the collection development policy must be reviewed and approved by the library board. Policies that may also be reviewed include general operating policy, Internet policy, service area, interlibrary loan policy, etc.  |
|                 | Library Visits per capita<br><b>25,000/Systems</b>     | Libraries serving populations of over <b>25,000 and Systems</b> should report this statistic. Enter the per capita figure rounded to one decimal point (ex: 13.6) If you do not have a door counter, add up the number of persons who came into the library during one week and multiply this number by 52 (number of weeks in the year.) Then add the number of people who attended all programs during the year and divide by the latest Census population estimate for your city, county or system. |
|                 | Title and Author/Subject Fill Rates<br><b>M-Z</b>      | Libraries serving populations <b>under 5,000</b> with city names beginning with <b>M-Z</b> should report this information from the fill rate survey (systemwide.) Enter Titles sought, Titles filled, Author/Subjects sought, Author/Subjects filled.  |
|                 | Age and Condition of Collection<br><b>5,000-25,000</b> | Libraries serving populations from <b>5000 – 25,000</b> should report this statistic. Total number of items included in survey (including any not found.) Report number of items in Excellent, Good, and Poor conditions. Items that are not found should be reported on the Other line. Report Age of items in range brackets: under 5 yrs., 6-10 yrs., 11-25 yrs., and 26 yrs. and up. Report as Other, items not found, no date on item, etc.   |