Instructions

General instructions/definitions

- Please call the Library Development Office with any questions at 317-232-3697 or 1-800-451-6028 or email ldo@statelib.lib.in.us or ehuffman@statelib.lib.in.us
- All information in the annual report is a matter of public record and much of it is published on the World Wide Web.
- Give most current information for
    - Respondent identification,
    - hours of operation,
    - assessed valuation and tax rate, and
    - hourly salary for salary section (dollars and cents required).
    - All other information should be for report year.
- If the exact data are not known for any item, please estimate data. Estimates are very important. Enter "0" if the correct entry for an item is zero or "none". Enter "N/A" if you know a particular data item is not "0" but you don't know what it is and are unable to estimate it.
- Enter all dollar amounts as whole dollars, no cents. Round up to the next dollar for 51 cents or more, round down for 50 cents or less.
- Library Code – unique, 4-digit number assigned to your library system by the Library Development Office, Indiana State Library
- Public Library (National Center for Education Statistics (NCES), Federal State Cooperative System (FSCS) definition) - A public library is established under state enabling laws or regulations to serve a community, district, or region, and provide at least the following:
    - an organized collection of printed or other library materials, or combination thereof;
    - paid staff;
    - an established schedule in which services of the staff are available to the public;
    - the facilities necessary to support such a collection, staff, and schedule; and
    - supported in whole or in part with public funds.
- PLEASE READ INSTRUCTIONS and DEFINITIONS, AS SOME HAVE CHANGED, OTHERS HAVE BEEN CLARIFIED.

Part 1 - General Information
Respondent Identification

- Please provide the most current information available.
- Report Mail address ONLY if different from Street Address.
- Please contact the Library Development Office with updates for this information throughout the year, as this information is used to update both the print and on-line directories.

Library Director – The name of the current or interim director.

Library Name – This is the legal name of the administrative entity.

Administrative Entity – This is the agency that is legally established under local or state law to provide public library service to the population of a local jurisdiction/library district. The administrative entity may have a single outlet, or it may have more than one outlet.

Street Address – This is the complete street address of the administrative entity (or branch, for a branch/outlet record).

Street City – This is the city in which the administrative entity (or branch, for a branch/outlet record) is located.

Street Zip + 4 - This is the standard five-digit postal ZIP code and four digit postal ZIP code extension for the street address of administrative entity (or branch, for a branch/outlet record).

Mailing Address – This is the mailing address of the administrative entity (or branch, for a branch/outlet record.

Mailing City – This is the city or town of the mailing address for the administrative entity (or branch, for a branch/outlet record) is located.

Mailing Zip + 4 - This is the standard five-digit postal ZIP and four digit postal ZIP code extension for the mailing address of administrative entity (or branch, for a branch/outlet record).

Dial-in Access Number – Telephone number which patrons must use to dial in to your library catalog, if that service is offered.

Congressional District #– Number of the United States House of Representative District in which the greatest number of library district residents is located. Indiana currently has 9 districts.

Public Library E-mail Address – This address is published in the public library directory, both print and on-line.

World Wide Web Address- This is the Web address of the administrative entity.

Time and Day of the Month of Regular Library Board Meetings – For example, 7:00 pm, 3rd Wednesday.

Person Preparing the Report – The name of the person to whom questions about the report should be directed.

(1b) Central Building/Library - A single outlet library, or the library building which is the operation center of a multiple outlet library. Usually all processing is centralized here and principal collections are housed here. It is synonymous with main library.

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

Outlet –Central library, bookmobile or branch library. An outlet is a unit of an administrative entity that provides direct public library service.

Main Library – Central Building/Library

(3) Construction Project – Information is collected on new building projects, remodeling or renovation of your current building(s). Library Development Office uses this information for the annual Library Journal construction information issue.

(5a - n) Daily Schedule for Central Library Only - Please record hours open for the Central Library only. Record the hours open during the winter in a typical week.

(6) Total Evenings Open after 5:00 p.m. Each Week – Indiana Public Library Standards require evening hours.
> Under 15,000 population – 1 evening per week (any hours open after 5:00 p.m.)
> 15,000 – 30,000 population – 2 evenings per week (any hours open after 5:00 p.m.)
> 30,000 + population – 3 evenings per week (any hours open after 5:00 p.m.)

Public Service Hours Per Year – This is the sum of annual public service hours for outlets (library systems with only one building and those with multiple bookmobiles and/or branches).

(5) Total Winter Weekly Hours – For the central library only.

(8) Total Number of Branches – List total number of branches . Enter "0" if your library has none. List each branch separately.

Total Number of Bookmobiles – List total number of bookmobiles. Enter "0" if your library has none.

Branch Information

Branch Libraries - Auxiliary units with separate quarters, a permanent, organized collection of library materials, a permanent paid staff, and a regular schedule for opening to the public.

Street Address – This is the complete street address of the branch.

Street City – This is the city in which the branch is located.

Street Zip + 4 - This is the standard five-digit postal ZIP code and four digit postal ZIP code extension for the street address of branch.

Mailing Address – List only if different from the street address. This is the mailing address (if different from the street address) of the branch.   Include city and zip +4.

Square Footage – Report the area, in square feet, of the branch. Report the total area in square feet for each 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.

Internet Access - Report the branch as providing Internet access only if one or more of the following services are accessible: World Wide Web (WWW), telnet, gopher, file transfer protocol (ftp), or community network. Do not answer "YES" if the branch has access to electronic mail only. Report type of Internet access. List only the bandwidth available (that is, if you have a T1 but it's turned down to a 128, list 128, etc.)

Hours open - Please list the current hours open.

Bookmobile Information

Bookmobiles - A bookmobile is a traveling branch library consisting of a truck or van that carries an organized collection of library materials, paid staff, and regularly scheduled hours for being open to the public. Vehicles used are counted, not the number of stops the vehicle makes.

Street Address – This is the complete street address of the Bookmobile storage location. This will often be the administrative entity address.

Street City – This is the city in which the bookmobile is housed. This will often be the administrative entity address.

Street Zip + 4 - This is the standard five-digit postal ZIP code and four digit postal ZIP code extension for the street address of the bookmobile storage location. This will often be the administrative entity address.

Mailing Address – List only if different from the street address. This is the mailing address (if different from the street address) of the administrative entity (or bookmobile storage location). Include city and zip +4.

Phone and Fax – Report only if specific to the bookmobile. Leave blank if the same as the administrative entity.

Internet Access - Report the bookmobile as providing Internet access only if one or more of the following services are accessible: World Wide Web (WWW), telnet, gopher, file transfer protocol (ftp), or community network. Do not answer "YES" if the bookmobile has access to electronic mail only. Report type of Internet access. List only the bandwidth available (that is, if you have a T1 but it's turned down to a 128, list 128, etc.)

Hours open - Please list the hours the bookmobile is in service to the public.

Part 2 – Registrations

(10) Total Number of Resident Registered Borrowers - Report the number of people who have applied for and received borrowing privileges from your library and live in the library district, including areas contracting for library service, as either (a) individual or (b) family/household.   Exclude non-residents who pay for library privileges, PLAC cardholders, Reciprocal Borrowers and Student Borrowers.

(11) Total Number of Non-Resident Registered Borrowers - Record the number of registered borrowers who do not live in your library district or areas contracting for library service. These are people who have applied for and received borrowing privileges from the reporting library, but who do not pay property taxes for library service in any library district. Report each non-resident registered borrower in non-resident registered borrower as either (a) individual or (b) family/household.

 PLAC (Public Library Access Card) – individual statewide library card which allows a person to borrow library materials from any public library in Indiana. Books and non-book materials are eligible for loan through the PLAC program, and a library may determine what types of material it may lend. Books that normally circulate are required to be available for loan. A person who holds a valid public library card (resident or non-resident) may obtain a PLAC card. The annual fee is based on forty percent (40%) of the current average operating fund expenditure per borrower by all eligible public libraries as reported annually to the State Library in the State Library's annual "Statistics of Indiana Libraries", either in print or on the website: http://www.statelib.lib.in.us/www/isl/ldo/plstatsmenu.html

(12) Total Number of PLAC Borrowers - PLAC borrowers is the number of people who use a PLAC card, <u>not</u> the number of loans.

(13) Total Number of Reciprocal Borrowers - Reciprocal Borrowers is the number of people, not the number of loans. These loans may be made on the basis of local or statewide reciprocal borrowing agreements, but not including loans made on PLAC cards.

(14) Total Number of Student Borrowers - Student borrowers is the number of public school students given free or reduced fee cards, because they live in an unserved area but are in a school district, many of whose students live in your library's taxing district.

(15a & b) Non-Resident (Registration Card) Fee – Non-resident fee as of July 1 for the report year (or more current date, if available). **State law mandates** that the library board set the **individual fee** at $25 or the operating expenditure per capita of the library for the previous year, whichever is higher. The library board may set a family card fee. The Indiana State Library suggests that the family card fee be set at 2 ½ times the cost of an individual fee.

Operating Expenditures Per Capita – Relates total library funds spent for specific purposes to the number of persons the library serves. It includes the dollar amount spent on staff, materials, and miscellaneous expenses divided by the library's legal service area population. This figure approximates the average cost per person of running the library. Operating Expenditures Per Capita may be relevant whenever the efficiency of the library's overall operation is an issue. The cost-effectiveness of operations may be demonstrated by relating Operating Expenditures Per Capita to those output measures which best reflect the range of most frequently used services and programs the library provides to its users. It is also important to review this measure if the library's legal service area changes dramatically.

(15c) Date Library Board adopted this fee – The date the board adopted the non-resident fee listed in this report.

(16a) Most Recent Year Patron File was Weeded – Year patron file was reviewed and records deleted due to non-use or other criteria.

(16b) On what time table is Patron File Weeded - Annual, every two years, every three years, other

Part 3 – Public Libraries and Political Subdivisions Served

Library District – The political subdivision/unit taxed by an individual public library for library service.

17b & 18b) Assessed Valuation (AV) -   Enter the TOTAL assessed valuation upon which the library tax received in the report year was based. Show this for the TOTAL library district taxed to pay for services - not contract area. Your County Auditor can provide this information. If your library district is located in more than one county, provide information for both counties.

(17b & 18b) Operating Tax Rate - The library tax rate for local property tax approved one year for collection in the following year. Report the tax rate approved for the report year (generally approved by DLGF the previous year), if available. If your library district is located in more than one county, provide tax rate for both counties. This rate is reported as 4 digits to the right of the decimal point (i.e. .0101)

(17c & 18c) BIRF/Lease Rental Tax Rate - Bond and Interest Redemption or Lease Rental Tax Rate approved for collection in the report year (generally approved by DLGF the previous year). Your County Auditor can provide this information. If your library district is located in more than one county, provide tax rate for both counties. This rate is reported as 4 digits to the right of the decimal point (i.e. .0101)

LCPF – Library Capital Projects Fund. A separate fund for which library districts can levy a tax, to provide for capital projects.

(17e & 18e)LCPF Tax Rate - Library Capital Projects Fund Tax Rate approved for collection in the report year (approved the previous year). If your library district is located in more than one county, provide tax rate for both counties. This rate is reported as 4 digits to the right of the decimal point (i.e. .0101)

(19) Total Population without contract - The number of people in the political subdivisions/units in your library district who are taxed for library service. Types 1, 2, 3, 4, 9, 11 and 12 are taxed (served) populations and are added together for the library district population. Types 5, 6, 7, 8, and 10 are not taxed (served) and do no count in the library district population. The Library Development Office determines the population based on the most current decennial census. The population is changed between censuses only upon merger with additional political subdivision(s)/unit(s). This number is automatically computed.

(20a, 21a, 22a, 23a, 24a, 25a, 27a, 27a) Political Subdivision/Unit Name: Enter the name of the town, township, or county served.

(20b, 21b, 22b, 23b, 24b, 25b, 26b, 27b) Type of Political Subdivision/Unit: Report the type of library service area (area taxed by your library to provide library service).
>   **1.**   **Town/City.** Library tax boundaries are the **same** as town or city boundaries.
>   **2.**   **County-Partial.** A county library tax district which covers part of the county in which it is located; the remainder of the county is served by another library district.
>   **3.**   **County-Total.** A county library district which includes the **entire county** in which it is located.
>   **4.**   **Township Merged.** Library tax district includes a former town/city district and one or more townships which have merged into a single town-township library district.
>   **5.**   **Township, Partial, Served by Contract.** Part of a township is served by a contract with a nearby library district. Township funds to pay contracts may come from the township general fund or other unspecified revenues. **Please explain what part of the township is served. Be specific.**
>   **6.**   **Township Served by Contract.** An entire township is served by a contractual agreement with a nearby library district. The source of funds is unspecified.
>   **7.**   **Township Taxed to Pay Contract.** Township levies a specific tax rate upon township property to pay for service received under contract from a nearby library district.
>   **8.**   **Township, Partial, Taxed to Pay Contract.** Same as Type 5 above, with the exception that revenues are raised by the township through a direct library tax. **Please explain what part of the township is served. Be specific.**
>   **9.**   **Township Validated.** Same as Type 4 above, with the exception that the township has been taxed and served traditionally throughout the history of the library but no formal merger was adopted or recorded prior to conversion to the Public Library Law of 1947 as a town-township library.

10.   **Town Served by Contract.** Town served through contractual agreement by a nearby library district.

11.   **Endowed.** Library was established through and received operating funds from a bequest or endowment; all endowed libraries except the Tyson Library Association Inc., Versailles, also receive some tax revenues.

12.   **County Contractual.** A library tax district formed under Public Library Law IC 36-12-6 that provides library service in conjunction with a previously existing library district. The county contractual library board has no power to issue bonds or lease property.

(20c, 21c, 22c, 23c, 24c, 25c, 26c, 27c) Population of Political Subdivision – Report the number of people in each political subdivision in your library district, whether taxed or not.

Part 4 – Library Operating Fund Income

- Report only income receipted to the operating fund, except where specified. If funds are receipted to a gift fund(s) or other non-operating fund, do NOT report here.
- Enter all dollar amounts as whole dollars, no cents. Round up to the next dollar for 51 cents or more, round down for 50 cents or less.
- **County Contractual Libraries** – Combine and report all income from host and contractual library.
- **Gifts -** Gifts and donations may be receipted to a separate gift fund(s). Do not report any separate gift fund monies in the operating fund.
- Report income actually **received** in the report year or in January of the next year.
- If the exact data are not known for any item, please estimate data. Estimates are very important.
- Enter "0" if the correct entry for an item is zero or "none." Please enter "N/A" (Not Available) if you know a particular data item is not "0", but you don't know what it is and are unable to estimate it.
- Do not include ANY funds transferred to operating income from another account due to not receiving anticipated tax money. Only NEW money is reported.

Local Government Operating Fund Income

(28) Local Government Operating Fund Income - This includes all tax and non-tax receipts designated by the community, district, or region for the library operating fund and available for expenditure by the public library. Do NOT include the value of any contributed or in-kind services or the value of any gifts and donations, fines, or fees not receipted to the operating fund.   Report only actual funds received, not anticipated. Report all income, but report income in only one category.

(28a) Property Tax or CEDIT Operating Fund Income - Includes all tax receipts reported on Department of Local Government Finance (DLGF) Budget Order, usually in Fund 0101(General) and

designated by the community, district, or region and available for operating fund expenditure by the public library. Include report year monies received in January of the next year. Report Excess Levy here.

(28b) CAGIT (County Adjusted Gross Income Tax) Property Tax Replacement Credits (PTRC) -. Libraries located in counties that have adopted CAGIT report the allocation actually received in the report year as PTRC. The allocation is usually distributed in May and November. There should be income figures for both CAGIT PTRC and CAGIT Certified Shares if the county in which the library is located has adopted CAGIT.

(28c) CAGIT Certified Shares - Libraries located in counties that have adopted the County Adjusted Gross Income Tax report the allocation actually received in the report year as Certified Shares, usually distributed in May and December. There should be income figures for both CAGIT PTRC and CAGIT Certified Shares if the library's county has adopted CAGIT.

(28d) CAGIT Special Fund - Libraries located in counties that have adopted the County Adjusted Gross Income Tax report the allocation actually received in the report year as Special Fund.

(28d) County Option Income Tax (COIT) - Libraries located in counties that have adopted COIT report the total amount actually received in the report year. It is distributed monthly.

(28f) Contractual Revenue Received for Service - Report income received in the report year through a contract for service from a town, or township, from other libraries, or from other contracts for service.

(28total) Total Local Operating Fund Income - Includes all tax and non-tax receipts designated by the community, district, or region and available for operating fund expenditure by the public library. Includes Property Tax Income from the Library Tax Rate, County Adjusted Gross Income Tax (CAGIT) PTRC, Certified Shares and Special Fund, County Option Income Tax (COIT) and contractual revenue received from township trustee or other governmental unit official for library service.

State Government Operating Fund Income

(29) State Government Operating Fund Income - All funds distributed to public libraries by State government for the library operating fund for expenditure by the public libraries   Do not report federal income received from the state here. Report all income, but report income in only one category. Sometimes a tax distribution due in December is not actually received by the library until January of the following year. If you receive a tax distribution in January for the report year, report the tax distribution as part of the income for the report year. Report only actual funds received, not anticipated.

(29a) State Distribution State Government Operating Fund Income - Report only state funds received in the report year from the Indiana State Library public library distribution. DO NOT report PLAC funds here. DO NOT report State Technology Fund grant here.

(29b) Financial Institutions Tax (FIT) State Government Operating Fund Income - Report the total actual income received in the report year from the State Financial Institutions Tax. This will be listed on the DLGF Budget Program Estimates of Miscellaneous Revenue.

(29c) License Excise Tax State Government Operating Fund Income - Report the total actual state income received in the report year from the (Motor Vehicles) (Auto/Aircraft) License Excise Tax added to the Commercial Vehicle Income Tax (CVET) for a total of the two taxes**.** This will be listed on the DLGF Budget Program Estimates of Miscellaneous Revenue. AND **Commercial Vehicle Income Tax (CVET) State Government Operating Fund Income** - Formerly a property tax, now a state excise tax on any vehicle which requires a commercial vehicle driver's license. Add the amount received in the report year to License Excise Tax for a total of the two taxes. This will be listed on the DLGF Budget Program Estimates of Miscellaneous Revenue.

(29d) **Other State Government Operating Fund Income** - Report any other funds not previously reported as received from the State including Intergovernment Wagering Tax and Build Indiana Fund. List source. DO NOT report any funds collected from PLAC cards sold. DO NOT report State Technology Fund grant here.

(29e) **Source(s) (of Other State Government Operating Fund Income)** – List source(s) of all money received from the State Government not elsewhere reported.

(29total) **Total State Government Operating Fund Income** – Includes State Distribution, Financial Institutions Tax, License Excise Tax, Commercial Vehicle Excise Tax and other state income.

Federal Government Operating Fund Income

(30) **Federal Government Operating Fund Income** - This includes all federal government funds distributed to public libraries for the library operating fund for expenditure by the public libraries including federal money distributed by the State. Report all income, but report income in only one category. REPORT INCOME REIMBURSED, NOT AMOUNT OF GRANT.

(30a) **LSTA Grants Federal Operating Fund Income -** Report all LSTA grants placed in and expended from operating funds in the report year. REPORT AMOUNT RECEIVED (REIMBURSED), not amount of grant. Although LSTA Grants should go through the library's operating fund, some libraries receipt LSTA grants to a non-operating fund (LIRF, Gift, etc.). If your library's LSTA grants were receipted to a non-operating fund, please name the fund and report the amount.

(30b) **Non-Operating Fund (Federal Government Grants)** – Report here the name of the fund if an LSTA grant is not receipted to the operating fund but in this fund.

(30c) **Amount of LSTA grant placed in Non-Operating Fund** – Report here the amount of LSTA grant received (reimbursed) if receipted to a non-operating fund. This amount is not added into Total Federal Government Operating Income.

(30d) **Other Federal Grants Operating Fund Income**- Report all money received from the Federal Government except LSTA funds. List source.

(30e) **Source(s) (of Other Federal Operating Fund Income)** – List source(s) of all money received.from the Federal Government, including SLD/e-rate refund (as from AT&T or GTE). DO NOT list LSTA funds here.

(30total) **Total Federal Operating Fund Income** – Sum of LSTA grants and other federal grants operating fund income.

Other Operating Fund Income

(31) **Other Operating Fund Income -** This includes all operating fund income not reported in Local, State, or Federal Government Operating Fund Income. Do **not** report Technology Grants here. Do not include any contributed services or the value or any non-monetary gifts and donations. Report all income, but report income in only one category.

(31a) **Fines and Fees Operating Fund Income** – Report all fines and fees including: computer copies, fax, nonresident fees, lost/damaged materials, photocopy fees and anything else that applies.

(31b) **Interest on Investments Operating Fund Income** - Report any **operating** income generated from interest on investments.

(31c) Gift Receipt(s) Operating Fund Income – Report only gift funds receipted to the operating fund and appropriated for expenditure from the operating fund. Gifts are NOT required to be receipted the operating fund; they may be placed in a separate gift fund. Do NOT include the value of donations of books and other library materials and equipment. Do NOT report any separate gift fund monies in the operating fund.

(31d) Private Foundation Grants Operating Fund Income - Report only private foundation grant money receipted to the **operating** fund and appropriated for expenditure from the operating fund. Private foundation grants are NOT required to be receipted to the operating fund; they may be placed in a separate fund.

(31e) Miscellaneous Operating Fund Income - List source. Include checking account interest, any operating fund refund, and PLAC reimbursement check from the State of Indiana here. DO NOT report State Technology Fund E-rate Grants here. DO NOT include any contributed services or the value or any non-monetary gifts and donations.

(31f) Source(s) (of Miscellaneous Operating Fund Income) – List the source of Miscellaneous Operating Fund Income which does not fit into any other listed category. Include PLAC reimbursement check from the State of Indiana.

(31total) Total Other Operating Fund Income – Includes fines and fees, interest on investments, gift receipts, private foundation grants, Public Library Access Card (PLAC) and other miscellaneous operating fund income listed on Budget Form 2**.**

(32) Total Operating Fund Income – Sum of Local Government Operating Fund Income, State Government Operating Fund Income, Federal Government Operating Income and Other Operating Fund Income.

Part 5 – Operating Fund Expenditure Data

- Enter all dollar amounts as whole dollars, no cents. Round up to the next dollar for 51 cents or more, round down for 50 cents or less.
- Report actual expenditures, no encumbered funds.
- **County Contractual Libraries** – Combine and report all income from host and contractual library.
- Report all expenditures, but report expenditures in only one category. Report actual expenditures, no encumbered funds.
- Report Technology Grant expenditures in categories in which they were expended.
- Report estimates if necessary or "N/A" if unable to estimate. Report "0" if no expenditure made from a particular category.
- Rainy Day Funds is a separate fund to which libraries can transfer monies not currently needed for operating expenses. Do NOT include Rainy Day Funds as an expenditure.
- **Operating Fund Expenditures -** The current and recurrent costs necessary to the provision of library service, such as personnel,

library materials, binding, supplies, repair or replacement of existing furnishings and equipment, and costs incurred in the operating and maintenance of the physical facility
.

Personal Services Operating Fund Expenditures

(33) Personal Services Expenditures - . Personal service is the direct labor of persons in the employment of the library and all related employee benefits. Total expenditures for all salaries/wages for all library staff before deductions and including employee benefits.

(33a) Salaries/Wages for All Staff Operating Fund Expenditure - Category 1 from Operating Budget Form 1. Actual expenditures only, no encumbered funds. Include salaries and wages before deductions but exclude employee benefits

(33b) Employee Benefits Operating Fund Expenditure – Category 1 from Operating Budget Form 1. Actual expenditures only, no encumbered funds. Benefits provided for employees in addition to salaries and wages paid from the library budget, regardless of whether the benefits are available to all employees. Included are amounts spent for direct benefits including Social Security, retirement, medical insurance, life insurance, disability, tuition reimbursement, unemployment compensation, and workmen's compensation.

(33c) Other Personal Services Operating Fund Expenditures – Category 1 from Operating Budget Form 1. - Include fees paid for special counsel, legal service, surveys, expert and other services rendered of which the employment is temporary or on a part-time basis and social security, federal taxes, state taxes, and county taxes are withheld. DO NOT report contracts here. Contracts where **NO** Social Security, Medicare, and federal and state withholding taxes are withheld are reported in Category 3, Professional Services or Category 4, Repairs and Maintenance.

(33total IN) Total Personal Services Operating Fund Expenditures– Sum of Salaries/Wages for ALL Library Staff, Employee Benefits and Other Personal Services. **(33totalfscs)** Sum of Salaries/Wages for ALL Library Staff and Employee Benefits.

Total Supplies Operating Fund Expenditures

(34) Total Supplies Operating Fund Expenditures - Category 2 from Operating Budget Form 1. Supplies include commodities which, after use, are either entirely consumed or show a definite impairment of their physical condition and rapid depreciation after use for a short period of time. Include cost of printing of stationery, forms and other office supplies. Report cost of all office, operating, repair and maintenance supplies and other supplies.

Other Services and Charges Operating Fund Expenditures

(35) Other Services and Charges Operating Fund Expenditures – Category 3 from Operating Budget Form 1. Includes costs for services performed for the library under written or implied contract, by other than employees of the library. Also included are expenditures for utilities, insurance, licenses, rents, tax assessments, and dues to organizations. Includes the amount spent on the repair, maintenance, restoration, or protection of library materials, including but not limited to binding and rebinding, material conversion, deacidification, lamination, and restoration, transfer to LIRF.

(35a) Professional Services Operating Fund Expenditure)– Category 3 from Operating Budget Form 1. Include consulting, engineering, architectural, legal and other professional services.

(35b) Communications and Transportation Operating Fund Expenditures - Category 3 from Operating Budget Form 1. Include telephone, telegraph, postage, traveling, professional meetings, freight and express.

(35c) Printing and Advertising – Category 3 from Operating Budget Form 1. Include advertising and publication of notices and printing (other than office supplies, stationery, forms and other office supplies).

(35d) Insurance – Category 3 from Operating Budget Form 1. Include official bonds and other insurance, such as policies covering injury or loss of property.

(35e) Utility Services - Category 3 from Operating Budget Form 1. Include gas, electricity, water, sewage and waste disposal services. Coal, fuel, oil and bottled gas used for heating should be charged to Category 2, Operating Supplies.

(35f) Repairs and Maintenance - Category 3 from Operating Budget Form 1. All expenditures of a contractual nature for repairs of buildings, structures and equipment. If repair is performed by regular employees of the library, labor should be charged to Category 1, Personal Services. Repair parts and materials should be charged to Category 2, Repair and Maintenance Supplies.

(35g) Rentals - Category 3 from Operating Budget Form 1. All expenditures for the use of properties not owned by the library, such as temporary office rooms, store rooms, post office box, safety deposit box, equipment, etc..

(35h) Debt Service (Operating Fund Expenditure) – Category 3 from Operating Budget Form 1 (operating expenditures only). Include expenditure for the reduction of the library's general obligation bonds (principal) and interest only if paid out of operating fund.

(35i) Lease Rental Operating Fund Expenditure – Category 3 from Operating Budget Form 1. Expenditures for the reduction of the principal of the bonds for the lease rental fund and the interest on such funds, only if paid out of operating fund.

(35j) Other (subcategory of Other Services and Charges Operating Expenditures) – Category 3 of Operating Budget Form 1. Include dues for state and national associations of a civic, educational, professional or governmental nature that have as their purpose the betterment and improvement of library operations, interest on temporary loans, taxes and assessments for streets, sidewalks, sewers and similar improvement, transfer to Library Improvement Reserve Fund (LIRF) (a separate fund to which libraries may transfer operating funds, endowments and gifts for capital projects) and all other services not included in other classifications..

(35j1) Transfer to Library Improvement Reserve Fund - Subcategory of Other (subcategory of Other Services and Charges –Category 3 of Operating Budget Form 1). Report separately due to requests for comparison/benchmark. This line does not add into the total of Other Services and Charges.

(35total) Total Other Services and Charges (Operating Fund Expenditures) - Category 3 from Operating Budget Form 1. Includes Professional Services, Communication and Transportation, Printing and Advertising, Insurance, Utility Services, Repairs and Maintenance, Rentals, Debt Services, Lease/Rental, and Other (Transfer to LIRF is a subcategory of Other).

Capital Outlays Operating Fund Expenditures

- Does not have to balance with Capital Fund Revenues

(36) Capital Outlays Operating Fund Expenditures - Category 4 from Operating Budget Form 1. Capital outlay is usually a long-term expense. Includes expenditures from the library's operating fund for improvements and replacement costs for existing furniture or equipment. Also includes all material expenditures for all formats, print and non-print, and may include electronic formats and access. It may include architectural and/or consultant fees, new buildings, additions, and major equipment purchases.

(36a) Land Operating Fund Expenditure– Category 4 from Operating Budget Form 1. All land owned by the library.

(36b) Buildings Operating Fund Expenditure– Category 4 from Operating Budget Form 1. All permanent buildings owned by the library.

(36c) Improvements other than Buildings Operating Fund Expenditure– Category 4 from Operating Budget Form 1. All other improvements to land owned by the library

(36d) Furniture and Equipment Operating Fund Expenditure – Category 4 from Operating Budget Form 1. . Consists of machinery, implements, tools, furniture, motor vehicles, typewriters, calculators, microfilm readers, photocopy machines, projectors, computers, televisions, and other equipment which may be used repeatedly without material impairment of its physical condition and which has a calculable period of service.

(36e) Books Operating Fund Expenditure– Category 4 from Operating Budget Form 1. Include book lease(s).

(36f) Periodicals and Newspapers – Print subscriptions to magazines, journals, and newspapers.

(36g) Nonprinted Materials, Microforms & AV, NOT Electronic Operating Fund Expenditure– Category 4 from Operating Budget Form 1. Include IVAN video/audio expenditures. Include movies on DVD, VHS, records, cassettes, music cds, Books on tape or CD, microform materials. Do NOT include expenditures for computer games, software or database licensing. Do not include library system software and microcomputer software used only by staff **(even if they are included in this line of your Budget Form 1).**

(36h) Electronic Format Operating Fund Expenditure– Category 4 from Operating Budget Form 1, "Nonprinted Materials)Microforms & Audio-Visuals", **if you can separate out these costs (otherwise report them in Nonprinted Materials, Microforms & AV).**. Included are all operating expenditures for electronic format materials considered part of the collection, whether purchased or leased, such as programs or databases on CD-ROMs, computer games or software for patron use **(or for checkout),** database license, magnetic tapes, and magnetic discs that are designed to be processed by a computer or similar machine. Included are operating expenditures for equipment when the cost is inseparably bundled into the price of the information service product. You may also post leases for databases which are used by patrons in lieu of print materials.

- If you post operating expenditures for library system software and microcomputer software used only by the library staff to Nonprinted Materials (Microforms & Audio-Visuals), report here. Otherwise, report wherever it is posted.

Total Materials - This includes all expenditures for materials purchased or leased by the library for use by the public. It includes Books, Periodicals and Newspapers, Nonprinted Materials, Microforms & AV, and Electronic Formats Operating Fund Expenditures. This is a total calculated within the annual report form.

(36total) Total Capital Outlays Operating Fund Expenditures – Total of Land, Buildings, Improvements Other Than Buildings, Furniture and Equipment, Books, Periodicals and Newspapers, Nonprinted Materials. Microforms & AV (not Electronic), and Electronic Format,.

361. Non-operating fund collection expenditures – The FSCS definition of collection expenditures includes expenditures from all funds. Please report expenditures from gift, grant, and any other funds used to purchase library materials, in the following categories. a) Books (include Book Lease), b) Periodicals and Newspapers, c) Nonprinted Materials, Microforms & AV, Not Electronic, and d) Electronic Format. These will be added to the operating fund expenditures to produce the FSCS totals for collection expenditures.

(37) Total Operating Fund Expenditures – Total of Total Personal Services, Total Supplies, Total Other Services and Charges and Total Capital Outlays Operating Fund Expenditures.

(38) Capital Fund Expenditures (NOT Operating Expenditures) - These expenditures COULD come from LIRF , BIRF/Lease Rental, Debt Service, Rainy Day Funds, LCPF, Gift Fund(s), Technology Fund, and other grants but do NOT come from Operating Fund Expenditures. Generally speaking, if the source of the funds was a special appropriation or contribution earmarked for a specific major purchase in the areas mentioned above, NOT operating income, then the expenditure should be counted as capital fund expenditures. Capital is usually a long-term expense. These are costs that are incurred usually for major purchases of or additions to fixed assets. The following include the most common uses of capital funds but are not limited to: building sites (real estate); new building construction; expansion of an existing building; remodeling or major repair of an existing building; initial book stock (sometimes called an opening day collection); furnishings or equipment for a new or remodeled building; new computers, not replacing others; new vehicles; repair to or addition to property (i.e. sidewalks), major emergency repairs or other emergency costs. Does not have to balance with Capital Revenue.

Part 6 – Capital Revenue (Income)

- Does not have to balance with Capital Fund Expenditures

- Rainy Day Funds – A separate fund to which libraries can transfer monies not currently needed for operating expenses.

(39a) Local Government Capital Revenue (Income) – Report all governmental funds received in the report year, designated by the community, district or region and available to the public library for the purpose of major capital expenditures. Include LCPF, BIRF/Lease Rental, LIRF, Rainy Day Funds.

(39b) State Government Capital Revenue (Income) - Report all funds distributed to public libraries by state government for the purpose of major capital expenditures. Include funds from state agencies/government only (Indiana Economic Development Corporation, etc).

(39c) Federal Government Capital Revenue (Income) – 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. Include funds from all federal agencies (Department of Commerce, Department of Agriculture, etc.)

(39d) Other Capital Revenue (Income) – Report private (non-governmental funds), including grants and gifts received by the library for the purpose of major capital expenditures.

(39total) Total Capital Revenue (Income) – This is the sum of Local Government Capital Revenue, State Government Capital Revenue, Federal Government Capital Revenue and Other Capital Revenue.

Part 7 – Employment Data

Full-Time Equivalent (FTE) - The total of part-time and full-time employees equated to the number of full-time positions. (Total hours worked divided by the hours in the workweek.) To ensure comparable data, 40 hours per week has been set as the measure of full-time employment by the National Center for Education Statistics (NCES), Federal State Cooperative System (FSCS). This is a number calculated within the annual report form.

ALA-MLS Librarian - A librarian with a Master's degree from a graduate program of library and information studies accredited by the American Library Association (ALA). Include all ALA-MLS Librarians, whether paid for through operating expenditures, grant money or with any other funds. Degree may be MLS, MIS, MSLS, MSIS, or other.

(40a) Total Number of ALL Librarians with an ALA-MLS – Number of librarians with master's degree from programs of library and information studies accredited by the American Library Association. Degree may be MLS, MIS, MSLS, MSIS, or other. Include all ALA-MLS librarians, whether paid for through operating expenditures, grant money or with any other funds.

(40b) Total Hours Paid Per Week For ALL ALA-MLS Librarians - Add together the hours each ALA MLS Librarian is paid each week (full-time and part-time). Include Librarians whether paid for in operating expenditures, grant money or with any other funds.

(40c) FTE for ALL librarians with an ALA-MLS – This is a number calculated within the annual report form, by dividing total hours worked ALL Librarians with an ALA-MLS by 40.

(41a) Total Number of ALL Librarians, including ALA-MLS Librarians - Number of persons with title or function 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 includes ALA-MLS Librarians. Include all librarians, whether paid for through operating expenditures, grant money or with any other funds.

(41b) Total Hours Paid Per Week For ALL Librarians, Including ALA-MLS Librarians – Add together the hours each librarian, including ALA-MLS librarians, is paid each week (full-time and part-time). Include all librarians, whether paid for through operating expenditures, grant money or with any other funds.

(41c) FTE For ALL Librarians, Including ALA-MLS Librarians - This is a number calculated within the annual report form, by dividing total hours worked by ALL Librarians by 40.

(42a) Total Number of ALL OTHER PAID STAFF - This includes all other paid employees. Include all other staff, whether paid for through operating expenditures, grant money or with any other funds. DO NOT include Green Thumb or other employees who are paid by another agency.

(42b) Total Hours Paid Per Week For ALL OTHER PAID STAFF - Add together the hours all other paid employees are paid each week (full-time and part-time). Include all other staff, whether paid for through operating expenditures, grant money or with any other funds. DO NOT include Green Thumb or other employees who are paid by another agency.

42c) FTE for ALL OTHER PAID STAFF - This is a number calculated within the annual report form, by dividing total hours worked by ALL OTHER PAID STAFF by 40.

(43a) Total Number of ALL PAID STAFF - This is a number calculated within the annual report form, by adding the number of ALL Librarians and ALL OTHER PAID STAFF.

(43b) Total Hours Paid per week for ALL PAID STAFF – This is a number calculated within the annual report form, by adding the hours paid for ALL Librarians and ALL OTHER PAID STAFF.

(43c) FTE for ALL PAID STAFF – This is a number calculated within the annual report form, by dividing the total hours paid per week for ALL PAID STAFF by 40.

(44) Number of Hours Per Week Considered to be Full-Time Employment in Your Library - The number of hours that is considered to be full-time will vary from library to library.

Part 8 – Library Service and Technology

- If the exact data are not known for any item, please estimate data. Estimates are very important.
- Enter "0" if the correct entry for an item is zero or "none." Please enter "N/A" (Not Available) if you know a particular data item is not "0", but you don't know what it is and are unable to estimate it.

Inter-Library Loans

(45a) Provided To Other Libraries – Number of library materials lent by the reporting library to another library upon request. Materials loaned to a branch by another branch, bookmobile or central library of the same system are not counted. Photocopies sent by any means, but not returned, are not counted.

(45b) Received From Other Libraries– Number of library materials borrowed by the reporting library from another library. Materials borrowed from a branch by another branch, bookmobile or central library of the same system are not counted. Photocopies received by any means, but not returned, are not counted.

Annual Local Library Services

(46) Library Programs - It is not necessary that a program actually take place at the library to be counted as a library program. A program that is planned, sponsored or carried out by the library staff is a library program, as in a school or other location, for example. If there is a series of programs, such as story hours, where the same people attend each program, the attendance for each individual program is counted. Count all programs, including those held at branches and bookmobiles. DO NOT count Dial-A-Story or other phone-in programs. DO NOT count meetings or programs at the library which are sponsored by another organization, including tutoring sessions.

(46a and 47a) Children's Programs and Program Attendance - Children are ages 0-14. Children's program attendance is the count of the audience at all programs for which the primary audience is children and includes adults who attend the program. Attendance at each program is counted separately, even though it may be one of a series. Count attendance and programs sponsored by the library, whether held at the library or elsewhere.

(46b and 47b) Young Adult Programs and Program Attendance – Young adults are ages 15-17. Young adult program attendance is the count of the audience at all programs for which the primary audience is young adults and includes people of other ages who attend the program. Attendance at each program is counted separately, even though it may be one of a series. Count attendance and programs sponsored by the library, whether held at the library or elsewhere

(46c and 47c) Adult Programs and Program Attendance – Adults are ages 18+. Adult program attendance is the count of the audience at all programs for which the primary audience is adults and

includes people of other ages who attend the program. Attendance at each program is counted separately, even though it may be one of a series. Count attendance and programs sponsored by the library, whether held at the library or elsewhere.

(46d and 47d) **General Programs and Program Attendance** – General program attendance is the count of the audience at all programs for which the primary audience is people of all ages. Attendance at each program is counted separately, even though it may be one of a series. Count attendance and programs sponsored by the library, whether held at the library or elsewhere.

(46total) **Total programs**– This is the total number of programs for children, young adult, adults, and general. This is an automatic total, calculated within the annual report.

(47total **Total attendance** – This is the total attendance at programs for children, young adult, adults, and general. This is an automatic total, calculated within the annual report.

Typical Week - A typical week is defined as a time that is neither unusually busy nor unusually slow. Holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or library are avoided. A week in which the library is open its regular hours is chosen. Seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open) are chosen.

(48) **Total Visits In Library Per Year** - Report the total number of persons entering the library in a year, including persons attending activities, meetings, and those persons requiring no staff services. **Be sure to include numbers from branch(es) and bookmobile(es**). You may use a typical week count, then multiply by 52.

(49) **Total Reference Transactions Per Year**- Report the total reference questions in a year including questions received from other libraries. A reference question requires knowledge or interpretation by the library staff of the library or its materials. It includes information and referral services. The request may come in person, by phone, by fax, mail, or by electronic mail. You should not report directional questions, queries about library policies or library services, activities, or the use of library equipment as reference questions. **Be sure to include numbers from branch(es) and bookmobile(es).** You may use a typical week count, then multiply by 52.

Reference Transactions - A reference transaction requires knowledge, use recommendations, instruction in the use of one or more information sources by a member of the library staff or interpretation by library staff of the library or its materials. It includes information and referral services. Information sources include printed and non-printed materials, machine-readable databases, catalogs, and other holdings records, and through communication or referral, other libraries and institutions and people inside and outside the library. A request may come in person, by phone, by FAX, mail, electronic mail, or through live or networked electronic reference service from an adult, a young adult or a child. Directional questions, queries about library policies or library services, activities, or the use of library equipment are not considered reference transactions and are excluded. Examples of directional questions include: where are the 800s, where is the bathroom, is your director available, are you open until 9:00 pm tonight.

Directional Questions – Directional questions, queries about library policies or library services, activities, or the use of library equipment are not considered reference transactions and are excluded. Examples include: where are the 800s, where is the bathroom, is your director available, are you open until 9:00 pm tonight.

Electronic Services

(50) **Licensed Databases** – Report the number of licensed databases (include locally mounted or remote, full-text or not) for which temporary or permanent access rights have been acquired through payment by the library, or by formal agreement with the State Library or a cooperative agreement within the state or

region. A database is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts) with a common user interface and software for the retrieval and manipulation of the data. NOTE: The data or records are usually collected with a particular intent and relate to a defined topic. A database may be issued on CD-ROM, diskette, or other direct access method, or as a computer file accessed via dial-up methods or via the Internet. Subscriptions to individual electronic serial titles are reported under Current Electronic Serial Subscriptions. Each database is counted individually even if access to several databases is supported through the same vendor interface. Do NOT include INSPIRE.

(50a, b, c) Report number of licensed databases acquired through payment or formal agreement:
- a) local;
- b) state (state government or state library (Indiana State Library will complete); or
- c) other cooperative agreements (or consortia) within state or region.

(51) Users of Public Internet Computers Per Year – Report the total number of individuals that have used Internet computers in the library in the last year. If the computer is used for multiple purposes (Internet access, word-processing, OPAC, cd-rom reference resources, games, etc.) and Internet users cannot be isolated, report all usage. Count each customer that uses the electronic resources, regardless of the amount of time spent on the computer. A customer who uses the Internet computer three times a week would count as three users. **Be sure to include numbers from branch(es) and bookmobile(s).** You may use a typical week count, then multiply by 52. Sign-up forms or Web-log tracking software also may provide a reliable count of users. Formerly known as "**Number of Patrons Accessing Electronic Resources In-house in a Typical Week**"

(52b) Internet Access in Central Building Only - Report the library as providing Internet access only if one or more of the following services are accessible: World Wide Web (WWW), telnet, gopher, file transfer protocol (ftp), or community network. Do not answer "YES" if the library has access to electronic mail only. Internet access in branches and bookmobiles are reported separately. List only the bandwidth available (that is, if you have a T1 but it's turned down to a 128, list 128, etc.)

(53) Number of Computer Terminals – Count in 4 separate categories: (a) used by staff and connected to the Internet, (b) used by staff only and NOT connected to the Internet, (c) used by general public and connected to the Internet (count all Gates computers in this category), and (d) used by general public; NOT connected to the Internet.

(55) Bookkeeping System - Please indicate the full name of the bookkeeping system and the date when the State Board of Accounts approved the forms. The system is not approved, just the forms generated by the system.

(56) Circulation System – Please indicate the full name of the circulation system.
  NOTE - If you have signed a contract for a new system to replace an old one within the last year, please provide the name of the new system and indicate estimated installation date. **If you have issued an RFP within the last year, please send a copy to the Library Development Office to share with other libraries**.

Part 9 – Circulation and Holdings

Circulation

(57) Circulation - Transactions involving lending print and non-print from the library's collection for use by patrons generally outside the library and includes charging materials manually or electronically. Each renewal is also reported as a circulation transaction. Do not include in-house use of materials. Include interlibrary loans (items borrowed by your library and lent to your patron); report them also as Inter Library Loan transactions.

(57a) Total Circulation of All Materials – Include all materials (print and non-print) charged out to patrons of all ages either manually or electronically. Estimates are acceptable.

(57b) Circulation Of All Children's Materials – Materials cataloged as appropriate for patrons ages 0-14. This is a subset of total circulation of all materials. Estimates are acceptable.

Selected Holdings

- Selected holdings only.
- **Microfilm, microfiche, other microforms -** Do NOT count any microforms except for current serial subscriptions.
- Do not count any realia (puzzles, puppets, toys, etc.)
- **Holdings** – Materials the library has acquired as part of the collection and catalogued, whether purchased, leased, or donated as gifts.
- **Physical Unit** - A physical unit is a book volume, reel, disk, cassette, etc. Items which are packaged together as a unit, e.g. two compact disks, and are generally checked out as a unit, are counted as one physical unit.

(58a) Books - A nonperiodical/non-serial printed publication (including music and maps) bound in hard or soft covers, or in loose-leaf format. 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.

(58b) Bound Serials - Serials are publications issued in successive parts, usually at regular intervals and as a rule, intended to be continued indefinitely. Serials include periodicals (magazines), newspapers, annuals (reports, high school or college yearbooks, etc.), memoirs, proceedings, and publications of societies. Count each bound volume of a serial as one item. If you have more than half the issues of a publisher's volume in unbound copies, count each publisher's volume as one volume.

(58c) Video Materials - Materials on which pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver or monitor. Included are videocassettes, CD-ROM, DVD, and videodisks. Report the number of physical units, including duplicates. For smaller libraries, if physical unit data are not available, count the number of titles. Items packaged together as a unit (e.g., two videocassettes or DVDs for one movie) and checked out as a unit are counted as one physical unit.

(58d) Audio Materials - Materials on which sound (only) is stored (recorded) and that can be reproduced (played back) mechanically or electronically. Included are audiocassettes, phonograph records, audio cartridges, audio disks, audio reels, compact disks (including audio CD-ROMs), talking books, and other sound recordings. Report the number of physical units, including duplicates. For smaller libraries, if physical unit data are not available, count the number of titles. 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.

(58e) Electronic Format - Reference or printed information on CD-ROMS, Magnetic Tapes, Floppy Disks, DVDs (which are of a non-film nature, such as a reference book) or computer disks, magnetic tapes and other formats. You should count and report each physical unit, so that you would count each CD or each floppy disk in a multiple-disk set. Examples are U.S. Census Bureau CD-ROMs or data

tapes, locally mounted databases, serials and reference tools. DO include ResumeMaker, cemetery records or other software used by patrons or by staff for patrons. Do NOT count individual files on a disk or any software that is used only by the staff. Include cataloged and non-cataloged items. Do NOT include software loaded onto a computer for which you do not have a physical disk, which includes all pre-loaded software on Gates computers. DO NOT include Electronic Books in this count.

(58f) Electronic Books (E-Books) - 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). Include non-serial government documents. E-books are loaned to users on portable devices (e-book readers) or by transmitting the contents to a 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 physical or electronic units, including duplicates, for all outlets. For smaller libraries, if volume data are not available, the number of titles may be counted. E-books packaged together as a unit (e.g., multiple titles on a single e-book reader) and checked out as a unit are counted as one unit. **Note:** Under this category, report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC).

(58g) Current Serial Subscriptions - Includes Periodicals and Newspapers, print or microfilm ONLY. Report the total number of serial subscription titles, including duplicates. Report paid and gift subscriptions. Do not report individual issues. These are print and microfilm subscriptions only - **NOT** electronic or digital subscriptions. Include the total number of subscriptions for all outlets.

(58h) Current Electronic Serial Subscriptions – (DO NOT INCLUDE INSPIRE) The number of current electronic, electronic and other format, and digital serial subscriptions (e-serials, e-journals), including duplicates, for all outlets. Includes serials held locally or remote resources that the library has authorization to access, including those available through statewide or consortia agreements. Do not include subscriptions to indexing and abstracting databases that include full-text content (e.g. EBSCO Host, ProQuest, OCLC FirstSearch). Examples include periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series distributed in the following ways: (a) via the Internet.(e.g. HTML, PDF, JPEG, or compressed file formats such as zipped files), (b) on CD-ROM or other portable digital carrier, (c) on databases (including locally mounted databases), and (d) on diskettes or magnetic tapes.

Part 10 – Library Board

- Please enter the most current information available.
- List all county contractual board members, if appropriate.
- Personal addresses will no longer be collected, due to current state law.
- Review all information for accuracy.
- Delete board members no longer on the board.
- Add new board members as appropriate.

Library Board Members – List each current board member:
- Report any office currently held by each board member and list each board member only once.
    - **(59a)** President
    - **(60a)** President of County Contractual Library Board (if appropriate)
    - **(61a)** Vice President
    - **(62a)** Vice President of County Contractual Library Board (if appropriate)
    - **(63a)** Secretary

- o (64a) Secretary of County Contractual Library Board (if appropriate)
- o (65a) Treasurer
- o (66a-72a) Board Member
- o (73a) Treasurer/employee (please use this designation if appropriate)
- o (66a-72a) Other (only if appointee is from an unserved township))
- (59b-73b) List each board member's first name or initial.
- (59c-73c) List each board member's middle initial (optional) or middle name, if used in place of first name.
- (59d-73d) List each board member's last name
- (59e-73e) List the appointing authority:
  - o County Contractual Appointment (ONLY FOR THE 4 LIBRARIES WHICH ARE COUNTY CONTRACTUAL LIBRARIES)
  - o County Commissioners
  - o County Council
  - o Library board/employee
  - o Other - Class 2 Library Appointment (Only CLASS 2 LIBRARIES OR CLASS 2 WHICH HAVE ACCEPTED FINANCIAL PROVISIONS OF THE 1947 LIBRARY LAW).
  - o School Board
  - o Township Board
  - o Town Board/City Council/Mayor
- (59f-73f) Report the date the board member's term expires (VERY IMPORTANT)
- (59g-73g) Report the number of consecutive terms the board member has held (including the first term through this term) (VERY IMPORTANT).

Part 11 – Salary Section

- Complete minimum hourly rate and maximum hourly rate, using dollars and cents.
- Report only two digits to the right and to the left of the decimal.
- Please give the most current information available.

Job categories

(74) **Director** - Head of library. Indiana is an at-will employer state. Most directors will not have a contract. Indicate whether director has a contract. **Indicate whether director has an ALA-MLS.**

(75) **Assistant or Associate Director** - Librarian ranking next to the Library Director and having responsibility for library activities in the absence of the Library Director. I **Indicate whether director has an ALA-MLS.**

(76) **Department Head or Supervisor** - Librarians at the Department Head level who may have supervisory responsibility for other professional librarians and/or clerks.

(77) **Branch Head** - May be a staff librarian, but should be reported separately because of their unique position of Branch Head. Branch Heads spend at least half of their work week in a branch library setting and are usually responsible for the branch library services, programs, and personnel.

(78) **Administrative Assistant** - May include a variety of job titles such as Director's Secretary or Assistant to the Director. May have more administrative responsibility than typical clerical positions, but not the professional or managerial responsibilities.

(79) **Automation, Network or System Manager** - Manages the operation and maintenance of the library's computer systems, including the library's automation system and microcomputer applications. Develops and manages installation of various types of computer networks. Serves as contact with

internet provider. Possibly trains staff and public in use of equipment and software. Analyzes and troubleshoots software and equipment problems.

(80) **Business Manager** - Responsible for managing Business Office activities.

(81) **Cataloging or Technical Services Librarian** - Librarian - Cataloging. Both experienced and entry-level librarians.

(82) **Children's Librarian** - Librarian - Children's Reference Service. Both experienced and entry-level librarians.

(83) **General Reference or Adult Librarian** - Librarian - Adult and/or Reference Service. Both experienced and entry-level librarians.

(84) **Young Adult Librarian** - Librarian - Young Adult Reference Service. Both experienced and entry-level librarians.

(85) **Indiana History, Local History, or Genealogy Librarian** - Librarian - Indiana History, Local History, or Genealogy Reference Service. Both experienced and entry-level librarians.

(86) **Circulation Librarian** - Librarian - Circulation Desk. Both experienced and entry-level librarians.

(87) **Audio Visual Specialist** - Responsible for developing a program of AV services and supervising all AV activities and staff.

(88) **Specialist (Professional)** - Category for library professionals, including Training Specialist, Public Relations Specialist, Outreach Specialist, Human Resource Manager, Artist, and Printing Manager, who generally do not hold a master's in library science but certainly may.

(89) **Library Assistant** - Paraprofessional working in any area of the library, who assists librarians in providing a library service.

(90) **Bookkeeper or Treasurer** - Responsible for keeping the financial records and accounts for the library.

(91) **Secretary or Receptionist** - Knowledge of some office skills. May be responsible for answering phone.

(92) **Library Technician (including computer)** - Involves more responsibility than clerical category, usually specialized, and of considerable variation and complexity.

(93) **Clerical or Aide** - Knowledge of basic clerical skills and elementary knowledge of library procedure.

(94) **Maintenance, Custodian, Janitor, Housekeeper, or Security** - Responsible for maintaining the library building and/or grounds in a clean and orderly condition and in good repair. Security provides security during the hours the building is open or closed for staff, patrons, and the building. Do not include any staff that is paid by contract.

(95) **Bookmobile Driver**. - Bookmobile Driver.

(96) **Messenger** - Messenger responsible for pickup and delivery of library materials.

(97) **Page, Student Assistant** - Shelves books and other materials. Typically a part-time position with no supervisory responsibilities.

(98) **Substitute** - Temporary substitute employee in any job category.

(99) **Other 1** - Any other job category that it is not possible to include in above list. Please be specific.

(199) **Other 2** - Any other job category that it is not possible to include in above list. Please be specific.

Employee Fringe Benefit Information

- For each fringe benefit listed, please check (X) whether it is provided by your library for full time and part time employees. If the benefit is not provided, please leave the box(es) empty.
- Please give the most current information available**.**
-

(101a and b) **PERF** - Public Employees Retirement Fund

(102a and b) **Deferred Compensation** - A political subdivision may do the following: 1. agree with any employee to reduce and defer any portion of such employee's compensation which under federal law may be deferred under a nonqualified deferred compensation plan and subsequently contract for, purchase , or otherwise procure insurance and investment products appropriate for a nonqualified deferred compensation plan for the purpose of funding a deferred compensation plan for such employee **or** 2, contribute amounts before January 1, 1995 and continue or begin to contribute amounts after January 1, 1995 to a nonqualified deferred compensation plan on behalf of eligible employees, subject to any limits and provisions under Section 457 of the Internal Revenue Code (IC 5-10-1.1-1)

(103a and b) Health Insurance
(104a and b) Dental Insurance
(105a and b) Life Insurance
(106a and b) Vision Insurance
(107 a and b) Disability
(108 a and b) Paid Time Off for Continuing Education
(109 a, b and c) Other Fringe Benefit 1 Please specify. Do not include benefits reported in paid days off per year.
(110a, b and c) Other Fringe Benefit 2 Please specify. Do not include benefits reported in paid days off per year.

Paid Days Off Per Year

- Please indicate the number or range of numbers of PAID DAYS OFF per year for entry-level full time librarians and support staff and entry-level part time librarians and support staff.
- Remember, for purposes of this report, if an individual is referred to as a librarian within your library, they are considered a librarian.
- Please give the most current information available.
-
  (111a – d) **Number of Vacation Days** -
  (112a – d) Number of Sick Days
  (113a – d) Number of Personal Days
  (114 a-- d) Holidays
  (115 a – d) Funeral/Bereavement
  (116a – d) Other Days

Part 12 – PLAC Loans

- Number of items lent to patrons using a PLAC card.
- Complete the report for PLAC loans your library made to patrons from other libraries from January 1 through December 31 of the report year.
- The number of loans <u>must be an accurate count</u> of PLAC activity. Estimates may not be used.

- Do NOT include any miscellaneous or out of state loans as PLAC loans.
- Do NOT include any reciprocal borrowing (RB) statistics.
- If you did not loan any materials to PLAC patrons from other libraries, enter "0" in the appropriate box at the top of the form.
- The reporting library should show no PLAC loans, as its residents do not need a PLAC card for loans. There should be NO number next to your own library's name.
- List the total number of loans from each home library. Be sure to include branch library totals in the home library's total. (Home library is the PLAC card holder's library which their property tax supports or where they purchased a non-resident card.)
  - For example, a patron from Starke County Public Library (the city of Knox) uses a PLAC card at Knox County Public Library (the city of Vincennes) to borrow 10 items. Knox County Public Library would report 10 loans to Starke County Public Library (the city of Knox).

Part 13 – Statement of Compliance with Standards for Public Libraries

- Answer each standard yes or no, as applicable.
- For each "no" answer, provide details on Part 14, Statement of Intent to Comply with Standards.

(118 a –d) Laws Your library must follow all laws listed.

(120) **Written Bylaws** – The board must have written bylaws which it follows for operational procedures. The library is encouraged to file a current copy with the Indiana State Library, Library Development Office.

(121) **Written long-range plan for 2-5 years** – Such plans should encourage participation by the community, library board and staff. The library is encouraged to file a current copy with the Indiana State Library, Library Development Office.

(122) Current written technology plan – Required for e-rate. The Indiana State Library, Library Development Office must approve this plan and will send you a letter stating that.

(123) **Collection development policy and principles of access** – This is a plan for selecting materials for your collection and for dealing with questions of evaluation and suitability for patron groups. The Library board is encouraged to adopt the principles of the Library Bill of Rights.

(124) Separate functions of board and director – The board is responsible for governing the library by writing policy, developing a long-range plan and delegating management responsibility to the director. The director is responsible for managing the day-to-day operations to carry out the board's long range plan

I(125) In the Public Trust - The current state publication for trustees that is approved by the Indiana State Library. There are chapters on all aspects of the library's operation. The board is encouraged to participate in at least one seminar or workshop pertinent to their duties each year.

(126a) Full-time director – The director is paid for 35-40 hours per week, or if the library is open fewer than 35 hours per week, the director is paid for the number of hours that the library is open.

(126b) Appropriate certification – Does the director hold the appropriate permanent certificate at the level required for the library's served population? If the director holds a temporary certificate, check "no".

(127) Classify employees, adopt schedules of salaries or salary ordinance, and prescribe duties of employees – The Library Development Office maintains a file of samples.

(128) Written personnel policies and procedures – Essential for fair and consistent administration of personnel practices and actions.

(129) Continuing education – The library is encouraged to support continuing education for staff and trustees with paid time off and financial assistance for fees, travel, lodging and related expenses on an annual basis.

(130) Library facilities meet local, state, and federal building and health and safety codes – Report for all buildings in library system, central library and any branches.

(131) Americans with Disabilities Act – If there are steps to your building or other physical barriers that would prevent entry to your building by everyone but the library complies with the law by providing home delivery of materials, curbside services, etc., check "yes".

(132) Hours of service – A library serving a population under 15,000 must be open a minimum of 20 hours each week, including at least 1 evening (until 6:00 pm or later) and some hours on 1 weekend day. A library serving a population between 15,000 and 30,000 must be open a minimum of 45 hours each week, including at least 2 evenings (until 6:00 pm or later) and at least one 1 weekend day. A library serving a population of over 30,000 must be open a minimum of 55 hours each week, including at least 3 evenings (until 6:00 pm or later) and at least one 1 weekend day.

(133) **Minimum service** – (d) Interlibrary loan free of charge (other than reimbursement for actual photocopy and postage or freight costs)

(134) **Member of INCOLSA** – Paid member of INCOLSA, which provides Interlibrary Loan as well as other services.

(135d) Audiovisual services – Audiovisual materials (audiocassettes, music or spoken word cds, videocassettes, DVDs, etc.), audiovisual programs, specialist staff in audiovisual materials and services, for example.

(135e) Special services – For special populations such as people who are blind, deaf or physically handicapped. Types of services could include books-on-tape or large print books, accessible computer workstations, sign language interpreters, etc.

Part 14 - Statement of Intent to Comply with Standards

- List standard # and provide an explanation as to why you answered "no" to any question in Part 13, Statement of Compliance with Standards for Public Libraries AND
- Describe actions to be taken to comply with each "no" answer.