



Public Libraries Survey

Data Element Definitions

E-mails with Questions/Comments/Feedback/Input/Corrections/IMLS Response

<http://plsc.pbworks.com/w/page/7422611/Data%20Element%20Definitions%3A%20Questions%20Comments%20Feedback%20Input%20Corrections>

General discussion and other items:

<http://plsc.pbworks.com/w/page/24934711/News%20and%20Discussion>

Total Librarians vs. Total MLS	6
E-books.....	11
Clarification on Audio Downloadables.....	13
Floating Collection	15
Volunteers.....	17
Young Adults	19
Question about Consortia.....	21
Counting Electronic Items: A Query from Two AK Librarians	22
Capital revenue and expenditures.....	24
Bibliostat question re law books.....	26
Library Service Area	27
Public Library (Reporting to PLS Survey).....	28
Contractual Libraries.....	33
Library Closures.....	35
Licenses or Databases?	36
Inventory.....	38
Operating Revenue	40
Book Sales Stats	42
Monetary Rounding.....	43
How the Use of Audio and Video Downloadables are Counted	44
Reference Question or not? (patron's circulation record)	47
Revolving Collections	49
Downloadables and Catalogs.....	50
National Return on Investment calculation.....	52
Server Crashes and Survey.....	54
Counting Databases	56
Capital (in-kind).....	60

Public Access Internet Computers	61
Discards -- count as part of the collection?	64
Missing items – count as part of the collection?	65
Other items in the library’s collection	66
Bibliostat Question Fwd: MyLibrary DV downloadable tv shows and movies	67
Circulation: Total, Children, and do we separate out Young Adult?	69
Materials Processing Fees Question	70
Circulation: Check outs and Check ins?	71
Freegal (music service) – how do you count download	72
One-On-One Activity Counts.....	74
Counting less than a branch and more than a book station.....	75
Number of Weeks a Library is Open	77
Is an immobile bookmobile a branch?.....	80
Library Branches on School Sites - should they be counted as public libraries?	81
Video Games & Video-Physical Units.....	83
Question about a Branch	85
Online Book Discussion.....	88
E-book: what should be counted?	91
A Library Operates from a Temporary Location	96
Freegal (music service).....	98
Definition of Programs.....	100
Overdrive Consortiums	101
Inter-library loan question	106
Items/capita and downloadables	107
Circulation of Downloadable Items	109
Online Database Count	114
Video Game Software in Collection	115
Counting Overdrive, etc.	118
Library Web Page - Yes or No?	120
Indirect costs (Question About).....	129
Reference questions-what is, what isn't.....	130
Unemployment payout for former employee -- benefit or "other"	133
Leased Computers Expenditure.....	134
Federal Stimulus Funds.....	139
Issue: E-rate discounts	140
Units and Titles	151
Question About Counting Service Hours	153
Clarification: Data Element #451 E-Books (Consortium)	156
Schrodingers’ Database	157
Need a Ruling on Freading.....	158
E-Content Database	161
How to Count Use of Zinio.....	162

Counting “Seniors” versus just “Adults”	168
Early Literacy Station (ELS) from AWE	173
Outlet Level Data	174
Library Program or Not?	176
Is readers advisory counted as Reference?	178
Circulation of YA materials included with circulation of children's materials?	180
Book Clubs.....	183
Are exhibits counted as programs?	185
Consortium Purchasing.....	187
Need guidance on Mango languages and school/public library combinations.....	188
Programming and Training	190
502 Registered Users	193
Public Internet Computer Count.....	194
Questions on PlayAways, Career Fairs, and Fair Booths.....	196
Where are AWE uses counted?	198
Where to count MLS degrees in non-Librarian positions?	202
Consortial Circulation.....	204
Questions on Operating Revenue	207
Question about Temporary Locations	211
E-magazine Count	213
Beating a Dead Horse: Freegal and Tumblebooks	215
Freegal “Movies”	221
Hoopla Digital – does a library count the circulations.....	222
eBook/eAudio statistics issues.....	226
Zinio...again...still.....	228
Issues with admin offices for libraries	230
Bond payments	238
Counting e-books, downloadable audio, downloadable video in circ and collection	240
For-a-fee programs, to count or not to count	243
Is it a branch library?.....	244
Using tax forms for circ stats? And yet another database query!	249
IPLAR question	252
Program stat question	254
Clarification on Reference Transactions	256
Help on stats question: how to track reference questions answered by trained volunteers	259
More database woes... ..	264
Counting Items loaded on loaned-out E-Readers.....	271
Where to count public services activities that are system-wide, & not outlet-specific	273
Data element 503: registered users.....	274
Wireless Questions	276
Question about in-kind donations	279
New Wireless Question.....	280

Outreach at Farmer's Market at Program?.....	281
Counting Wireless Usages versus Users	282
Zinio, Freading - database or collection.....	284
Contracted Workers.....	290
OPAC Versus Internet Computers.....	292
Employees vs. Contractors.....	294
Can a kiosk be considered a branch?	297
What qualifies as a meeting room?	300
Programming counts question.....	302
Data on weeks open	305
Does streaming count as downloadable?.....	306
451 Changes (FY2015).....	307
Changed data element definitions (FY2015)	308
Microsoft 2003: The New Frontier	316
Circulation of Children's Materials.....	319
Programming question – StoryWalk	320
Database question: Insert clever baseball/database pun here	322
Registered Users and Guest Cards.....	323
Can devices (iPads) be counted as a library computer?	325
Income & Expenditures.....	328
"Debt Service" and Annual Statistical Report	337
Circ staff??	339
Question about Data Element 450	343
COUNTER - Counting Online Usage of Networked Electronic Resources.....	347
Data element 456-458: Databases/Electronic Collections question	348
Data Element #652 (Wireless Sessions – Annually).....	350
Technology Lending question	351
Flipster: Database or Magic Flying Unicorn?	353
Other operating revenue and expenditures	354
Electronic magazines?.....	358
Hoopla.....	359
Guidance on Counting WiFi Uses, Again.....	360
Electronic Materials	361
Mobile Hotspots.....	362
Telephone Calls	366
Clarification/guidance needed – Paid Staff, Public Access Computers, and Revenue	368
Hoopla stats	370
Roku Sticks	373
IndieFlix	374
Online Training Videos	375
Definition of Library Staff for Reference Counts.....	376
Percentage of collection expenditures spent on electronic materials/digital units.....	377

Core public library services	381
Reporting federal and state funds: The most tedious affair	383
Question about Friends and income.....	386
Challenged Materials	388
Reference questions vs. one-on-one tutorials.....	392
New data element--successful retrieval of electronic information	393
Counting Downloads vs. Streaming	401
Internet computers used by general public.....	402

2008

Total Librarians vs. Total MLS

June 30, 2008

Question

Pomerantz, Bruce, MN

I have a library which has underemployed staff with MLSs that are not classified as librarian. They accept the lower position and pay in hopes of a librarian vacancy opening up and that it will give them an edge in applying for the position. They are unionized so I assume there are distinctions in the work they are allowed to do.

However, some of their work is virtually indistinguishable from that of the librarian position, i.e.. they work the reference desk. I do not know if they are involved in materials selection or staff committee work or other professional duties. As a consequence, I have a library that states it has (e.g.) 25 librarian positions (Data element 251) but states it has 35 MLS. (Data element 251). I received an accurate edit check stating MLSs exceed Librarians. The Data Element 250 definition states that the staff have the MLS, but does not qualify the requirement by stating "and working in a professional capacity."

Cynthia said to either reduce the number of MLSs or increase the number of librarians.

I'm inclined to reduce the number of MLSs for the purposes of peer comparison and general analysis because comparing staff expenditures and number of librarians would be misleading.

Are there different opinions?

IMLS Comment:

Carlos Manjarrez, IMLS

Can anyone tell me if there is a precedent for altering the MLS figure to conform to the number of staff librarians? If so, than that would argue for suppressing the MLS number as Cynthia has suggested. If not, I would be inclined to ask Census to maintain the "imbalance" in the data file so that the data more accurately reflect current staffing realities, especially since this issue is something we would want to monitor over time. Thoughts?

SDC Comments

Kathy Sheppard, SC

I think this data (i.e. how many MLS holders are working out of class, negatively speaking) is important. It's an interesting number for several reasons, and a fairly common occurrence. I have worked in two libraries where this was exactly the case. I'm not sure what the mathematical consequence would be of allowing the number of MLSs to exceed librarian positions.

I guess this is a change in the survey that needs to be discussed and possibly approved in another year? As a newbie here I'm not sure what the procedures are for revisions. I'm with you, I'd reduce number of MLSs as that is clearly more in line with the intent of the question (to get numbers of staff, not information about their education.)

Very, Diana, GA

I agree. From what I've heard, the trend in management is to lower the salaries of librarians in several locations. I would like to know how many librarians with MLS are not considered professional staff.

Juan Tomás Lee , UT

This is interesting. The reality is: a library has MLS's not classified as librarians. Do we report reality or do we "adjust" reality for the purposes of peer comparisons?

Susan Vittitow, WY

If it MUST be adjusted, I think the logical thing to do is to do it the way Bruce proposes – to lower the number of MLS's.

I'm inclined to agree with many of the others who posted, though, that it would be best to keep the numbers as they are. If more and more libraries are employing MLS's in non-professional positions, that would be an important thing to know.

Steffen, Nicolle, CO

Lowering the number of MLSES seems the most logical to me, too.

Data element 250 asks for *librarians* with master's degrees. So when the question "do we count staff with an MLS that aren't librarians" is asked here, we advise public libraries to count staff members that meet the criteria of having all of the following: the title of librarian, the duties of a librarian, and the ALA-MLS.

I agree, it would be very interesting to know how many MLSES are working in jobs other than professional librarian. However, I don't think that is the intent of this question. I think to get at the MLSES working as support staff (probably for lower wages) is an interesting, but different question. My 2-cents.

Holly Van Valkenburgh, NV

In our collection of data via BiblioStat Collect, we request:

- Librarians with an MLS Certified Librarians
- Librarians with any other master's degree
- Others holding the title of Librarian

Obviously, we had never considered the alternative currently under discussion. We could add the category and report that data separately, if it is decided to do so. I believe it is a valid data element and should be reported separately.

Dianne Carty, MA

I am in total agreement with Nicolle. Data element 250 asks for librarians with MLS degrees. We have it both ways here in Massachusetts—those in librarian positions without an MLS and those in non-librarian positions with an MLS. Because we ask for the educational levels of all staff reported, we can look at just about anything. However, for item 250 we report only those MLS's in librarian positions. To return to the question at hand—SDCs should supply the information that each specific data element requires.

MLSES in a non-librarian position would be a new data element.

Ann Reed, OR

Usually this is the type of question I would steer to the Data Elements Subcommittee of the Steering Committee. But since this started as a general discussion, I agree with Diane and Nicolle – according to the definition, not all library employees can be considered librarians (see definition of total librarians). Unless one is hired in a job with the title and duties of a librarian, one wouldn't count the MLS. Yes, clerks may occasionally fill in at the reference desk, but this would probably be an aberration in the level of job duties. We don't currently measure the number of underemployed MLSES.

It would be interesting (and depressing) to track that figure, but I would ask – to what end? I'm already chivvying people to collect the federal elements as is – I hate to add to them without compelling reason. Is it that library schools would curtail enrollment to decrease the oversupply?

Is it that there would be a broad-based initiative for paid internships to give MLS grads a start in the profession? Is it that instead of scholarships, more people would pour funds into paid part-time jobs or internships to help? Is it likely that the only reason local libraries haven't opened more librarian positions is an undersupply of MLS types?

That said, I think if it's a one-shot survey on this issue, I could get a lot of our medium and larger libraries (where MLS in clerical capacity is more common) to report that data and give us an idea of what's going on. Yearly, it would be difficult.

Pomerantz, Bruce, MN

I went along with my inclination, which was the consensus, and reduced the number of MLSes to those who had positions titled Librarian so that ALA-MLS=Total Librarians.

I'm uncertain why the edit checks failed to flag the inconsistency in previous years.

I opine the accredited schools should survey their graduates of the past several years to determine how many ended up in non-librarian positions in libraries.

Question came up again March 6, 2009:

Michael Golrick, LA

I had a library ask me about staff who have an ALA-MLS but who are working in a position which does not require that degree. Are they counted as ALA-MLS or are they counted as support staff?

IMLS Response

The official IMLS response to this question is the same as what Denise and Bob have said in previous e-mails. The data element requests the number of individuals working as librarians who have ALA-MLS degrees, so support staff who have an ALA-MLS degree should not be included in this count.

Bruce was correct to point out that he had posed this question before. The answer was actually already posted on the Questions/Comments/Feedback page of the wiki (<http://plsc.pbwiki.com/Data+Element+Definitions:+Questions+Comments+Feedback+Input+Corrections>) in the pdf document (<http://plsc.pbwiki.com/f/Data+Elements+Questions+Comments.pdf>) that appears on the page.

This pdf document is updated with new answers every time we resolve a problem in this forum. Please try to remember to visit the Questions/Comments/Feedback page on the wiki before posting a question to the d-list.

IMLS thanks you all for your assistance in resolving this issue.

Comments

Denise Davis, ALA

It goes with the position requirements, not the credentials of the person in it. The key phrase in the definition is "title of librarian" – the bifurcation in reporting is those with an ALA-MLS and other librarians http://harvester.census.gov/imls/pubs/pls/pub_detail.asp?id=121# - instructions at the back of the report, with definitions.

Bob Molyneux (Former Director, Statistics and Surveys, NCLIS)

What Denise said.

If you mosey to this Web page, you will see a quicker answer:
<http://74.11.214.110/statsurv/NCES/pldf3/pldf3variables.html>.

There are two variables in question:

MASTER - ALA-MLS librarians and LIBRARIA - as Denise says "...holding the title of librarian."

As you will see, both concepts go back to the beginning (1987) of this series although with different names. This distinction, then, is an old one. PLDF3 allows looking at these through time.

Bruce Pomerantz, MN

I asked this very question last year. Isn't this the type of FAQ or archived material that belongs on the PLSC wiki?

Michael Golrick, LA

Thanks. So far the answers have been what I expected, I had only hoped to have a completely unequivocal statement like the one Denise made: "It goes with the position requirements, not the credentials of the person in it."

E-books

July 21, 2008

Question

Bruce Pomerantz, MN

While we're on the subject, Cynthia questioned some answers my libraries gave regarding e-books.

The State of Minnesota licenses from NetLibrary approximately 16,000 e-books, available for downloading from publicly funded libraries (schools, public, academic.)

Cynthia Ramsey asked, "Electronic Books are counted here only if they are included as part of the library collection accessed through the OPAC. Would you please verify that these are not books that are part of a database?"

My response in part, which I haven't sent yet because of other items that need researching, is, "I interpret the note regarding the OPAC as a way to differentiate and exclude books that may be freely available in the WWW, such as someone's self-published book on a personal website, or one the patron would choose to pay to download using the library's Internet speed.

I distinctly remember during the pre-vote discussion of this data element, agreement that we would have a duplicate number of titles counted as e-books because of state and regional licensing.

So, should we continue to count the 16,000 e-books as individual titles or as a database?

SDC Comments

Genny Carter, TN

I know that my superiors definitely believe that these e-books (and audiobooks) should be included in the collections of our libraries. The state purchased a contract to make them available to our public libraries, and patrons must use their library card to access them. These resources help out financially strapped libraries, and the libraries view them as part of their collection.

If the issue about the OPAC listing precludes the e-books and audiobooks from being counted for the federal survey, I will recommend that our libraries put them in the "Other" category that we have in our survey... and they probably won't be happy about it.

I'm glad to see I'm not the only one with questions on these changes!

Kathy Sheppard, SC

We ran into this question with last year's survey, when inclusion of the 16,000 Netlibrary titles triggered an edit check for the one library who has a subscription. I think of ebooks at this point, as purchased in database format, as the anomaly that will throw off comparisons with other libraries in our state. Until ebooks become a normal purchase for every library we will continue to count as one database. We are considering adding a local data element for non-print books.

Clarification on Audio Downloadables

July 30, 2008

Question

Susan Vittitow, WY

Before I finalize my Bibliostat instructions/testing, I just need to make sure I'm understanding the new downloadables count.

As of June 30, Wyoming libraries had 2,038 downloadable audio titles available through NetLibrary eAudiobooks. These were linked into the OPAC, so as I understand it, these are counted under the new guidelines.

Here is where I'm confused -- do they count these titles at the system level or at the branch level? So, for example, Laramie County Library System has two branches. If we count the downloadable audio at the system level, we have 2,038. If we count it at the branch level, we have 6,114.

It's my understanding we count it at the branch level, but I wanted to confirm.

SDC Comments

Juan Tomás Lee , UT

I had assumed it was at the system level, since you are reporting total number of items for the administrative entity. The NetLibrary items just "happen" to be available to every patron in the system, regardless of what branch they use. Still, I may be wrong and would like to hear what others are doing. Great question!

Alan Zimmerman, WI

For Wisconsin I report at the library level so I would report 2,038, not 20,380 for a library with 10 branches.

Grace Kelly, NY

In New York, we have 23 public library systems, each of which has "member" libraries that are separate legal entities chartered by the NYS Board of Regents. Some of our systems provide titles system-wide but each of the member libraries has the option of subscribing and if they so choose, they offer the titles individually to their own patrons, separately and distinctly from other member libraries in the same system. And then, some member libraries have branches. The items are not multiplied by the number of branches. However, the member libraries do count the titles for the purpose of their own annual reports. The systems file different annual reports with us that are not part of PLSC initiative.

Lynn Shurden, MS

I agree with AI. It's just the same as the number of databases that are available state-wide through the libraries. We only count these at the system level and not the branch level. If we count one way for one thing, then it should be the same for all.

Frank Nelson, ID

Question Do we count the number of downloadable audios and videos available via the catalog and multiply by the number of outlets in the system?

Suggestion: Let's not. Let's just add the number of titles available to the administrative entity. Collection elements 450-453 already allow a title count as an alternative to volume count for "small" libraries. Let's make use of that option for now. We can formalize it in December.

While it may still be appropriate to count duplicates for print items and physical units, and perhaps even for some electronic subscriptions, it really makes no sense to inflate holdings figures by duplicating the downloadables available to the administrative entity by whatever means, especially where the list of available titles is the same for everyone in a state or a consortium because of a group contract.

Floating Collection

September 04, 2008

Question

Beth Bisbano, PA

I have a question pertaining to a library system that I would like to have some advice on:

The system is planning to begin using some floating collections. What this means is that the items will not be owned by a particular location, but instead will be owned by the system as a whole and will just reside in the location where they are returned. How would a library submit the annual count of these items at the branch level since they don't "belong" to any one location? Should the just pick one location to add the floating collection to?

Thanks for any input.

SDC Comments

Edythe Huffman, IN

We don't collect on the branch level, but we do have at least one library system that does what you are describing. It would certainly keep the librarians on their toes to learn the collection. --

Dorothy Liegl, SD

We have one library that has 11 branches that does what you are talking about with print books. They just count the books as being part of the "total" collection of the library. We don't collect numbers at the branch level. Because I don't know how you define "systems" in PA, this may not be a valid comparison. We don't have multi-library systems in SD.

Juan Tomás Lee , UT

In Utah we seem to do the same as Dorothy in South Dakota. We do not collect numbers at the branch level either, so the Administrative Entity report for the whole "system."

Bruce Pomerantz, MN

In Minnesota, we collect information at the branch level. (I have the impression that very few of us do.) Bibliostat Collect performs an edit check when a data element at the administrative level does not equal the sum of the outlets. Under these circumstances, I ended up creating an outlet called "Office." (Think miscellaneous) Any number that doesn't fit any place else goes into the office.

For example, because renewals typically are not assigned to any specific branch, the administrative circulation does not equal the outlet circulation sums. Enter the "Office" where the renewal circulation is entered and therefore used to balance "the books." (Data sent to IMLS asks only for the administrative total and the Office does not officially exist for IMLS purposes.)

This is a long way to say perhaps you can create an "office" for the floating collection and just enter n.c. for each of the outlets.

Volunteers

September 15, 2008

Question

Juan Tomás Lee , UT

I have a weird question: Does anybody ask for (a) Total number of library volunteers in a year and (b) Total number of hours those volunteers worked in the library in a year?

If YES, how do you count the number of volunteers? For example: One person who volunteers to conduct a storytime every week (52 times a year) - is that ONE volunteer or 52 volunteers?

Any feedback is appreciated. Thanks,

SDC Comments

Stacey Malek, TX

We ask how many total hours volunteers worked in the libraries during the year.

Ira Bray, CA

We ask for volunteer FTE per week, here are our instructions:

Volunteers. FTE volunteer workers, average per week. Enter number of persons in Full Time Equivalents, not number of hours worked. A person who volunteers ten hours a week would be counted as .25 FTE, i.e., one quarter the time of a full time person.

Thomas Ladd, NH

New Hampshire counts volunteer efforts in two ways:

Number of Volunteers

How many volunteers does your library have?

Defined: "Report the total number of individual volunteers working at your library during the reporting year, regardless of the number of hours they worked."

Volunteer Hours

TOTAL hours volunteered in a typical week in your library. Defined "Report the number of hours volunteered in a typical week at your library by all volunteers."

I hope that this helps!

Amy L. Johnson, FL

Juan, Florida asks "Total number of volunteer hours". The definition is "Report the total number of hours worked by library volunteers during the year."

I hope this helps.

Young Adults

September 22, 2008

Question

Susan Vittitow, WY

Something to throw out there for consideration. Just got off a conference call with my local libraries where we went over this year's changes, etc.

The official definition of Children is age 14 and under, while Young Adult is ages 15-17. I know of very few -- if any -- libraries who make their YA distinction at age 15. I've seen it more commonly split between children's & YA between 6th and 7th grade.

Anyone else run across this?

SDC Comments

Edythe Huffman, IN

Yes, I have, so I took the age off the definition. Made my people happy, may skew the numbers but they probably weren't right to begin with. I fight too many battles anyway, so I threw in the towel on this one.

Ira Bray, CA

In California we are using the ALA YALSA definition of young adult, 12-18.
<http://www.ala.org/ala/mgrps/divs/yalsa/aboutyalsab/yalsafactsheet.cfm>

There is an overlap in target age with children, but the programs are classified by targeted group, not the age of attendees so it does not present a problem.

We've had good response to this first year of collecting YA program counts.

Thomas Ladd, NH

As usual, Ira make a good point - a YA program is defined by who we aim it at.

New Hampshire has collected Children's/YA/Adult programs and total attendance in each category for several years. While generally stating that ""children" are to be considered persons 14 years or younger.", the YA questions are defined as:

"Total Number of Young Adult Programs in Year. "Young adult" is an age defined by your library. "Program" is as defined for children's programs in the previous question. If a program is for children and young adults together, count it in children's programs. DO NOT count joint programs as two programs. If you do not count young adult programs separately from children's programs, enter n/a."

" Young Adult Program Attendance. The count of the audience at all programs for which the primary audience is young adults. "Young adult" is an age defined by your library. If a program is for children and young adults together, or you do not differentiate, count the attendance at each program ONLY ONCE, in Children's Program Attendance."

For us, at least, it has worked.

In answer to Susan's original question, I asked our NHSL Youth Services Coordinator, Ann Howy, who commented:

"You've hit on one of the big topics of the YA library world! I would say that every library defines YA differently, but that most would think of it as ages 13 and up (up to what, I'm not sure.) Many libraries in NH have "younger YA" collections as they often lose the older teens to other school districts or to adult reading. I've seen many YA collections geared to kids starting in grades 6 and going through grades 8 or 9. The publication VOYA recognizes this wide age range by rating its reviews M, J or S--(M grades 6-8, J grades 7-9 and S grades 10-12.)"

I think I see now why we decided to leave the definition of a "YA" up to the individual library!

Bruce Pomerantz, MN

For what it's worth, when infrequently asked, Minnesota instructs libraries to enter YA in the Adult numbers that we collect (programs and attendance). No one has objected or promoted the need for a separate YA count.

Whether the lack of questions means there are few YA efforts or that libraries are entering the data in the children's category because they don't read the definitions is another issue.

Question about Consortia

October 14, 2008

Question

Scott Dermont, IA

Since I am still very new to this, I am not sure where I should post this question. If this isn't the correct forum, let me know and I'll change it.

My question is about how to count items purchased by consortia. I have a couple of examples in Iowa that are causing a bit of confusion.

First, we have a consortium of libraries that have bought into the Overdrive audio book service. Each library in the consortium (called WILBOR) pays a set annual fee plus a certain amount per audio book circulation in their library for FY08. There are currently 84 libraries in the consortium and they currently have over 1200 items. The question comes up about how libraries should report this in the annual survey. Should each library in the consortium report all 1200+ items as part of their audio book collection? Since each library has access to all 1200 items, the case made by many is that they should be allowed to do this. The problem is that this can vastly inflate numbers for collection size, and it seems to be a form of double dipping. Many of the libraries in this consortium are tiny and may not even have this many items in their entire library.

The second question regards the use of revolving collections. A group of libraries gets together and pitches in a certain amount of money to pay for a revolving collection. This collection or parts of it, then travels from one library to the next on a regular basis. Should each library in this consortium claim the total collection as theirs? Should they only claim those titles that they actually purchase? I think the problem here is that the money is pooled, so no library can claim a certain number of titles as "theirs."

I would like to know what other states that have these kinds of consortia do on their surveys. Thanks for your help,

SDC Comments

Susan Vittitow, WY

The collection inflation is the reason why we split out electronic audio books from physical audio books in our survey. Although the IMLS will count both as one, we can split it out at the state level to track it more accurately and in a more relevant manner. We have NetLibrary, and each of our 23 county library systems counts the 2,800-or-so titles we had on June 30 once (so 23 x 2,800). It's going to be a huge jump in our official audiobooks collection.

As for double-dipping, it may be, but it's no different than how we've handled databases, where we have 39 licensed databases each counted once by our 23 libraries. I've not a clue on the revolving collections question.

Counting Electronic Items: A Query from Two AK Librarians

October 14, 2008

Question

Patience A. Frederiksen, AK

A few weeks ago, I got the same question about our statistical definitions from two different librarians in one day. They were working on the annual report and had concerns about why we count just those electronic items that have records in our catalogs.

Their questions had to do with this sentence: For electronic units, report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC). This sentence has been part of the definition for E-books #451 for some time and was just added to audio #452 and video #453 holdings.

They both asked why just count electronic materials that have records added to the catalog when in many cases, electronic materials can be found through a separate link that is prominently featured on the library webpage. Both pointed to the link to Listen Alaska (our name for a shared contract that provides downloadable audiobooks from Overdrive) on their web pages as providing access to the titles.

One librarian asked why we count databases that are not linked in our catalogs, but require catalog records to count electronic books and downloadable audio and video.

Both talked about the additional cost of adding records for these materials to SIRSI.

The cost of adding these records to their catalogs for the Overdrive titles is especially significant in Alaska, because 13 of the largest libraries have a shared contract to buy downloadable audiobooks, so each of the 13 libraries would need to add records for the titles to their catalogs in order to count them.

One said that the maintenance of records on their catalog is an issue, especially when the vendor adds and deletes titles from the service a lot. Her library subscribes to My Library DV and that vendor changes the title mix a lot. She said the Overdrive list of titles is stable, because specific titles are selected under the shared contract.

I said that if they added records to their catalog, more patrons would find the titles. One librarian disagreed and said that the format of the material is more important to patrons because downloadable materials are very attractive to certain patrons who want to find all the downloads in one place and not have to search the entire catalog to find a subset of downloadable items.

We discussed the idea of breaking out these items as follows:

Ebooks/audio/video purchased by the library with records in the library catalog

Ebooks/audio/video purchased by the library without records in the library catalog.

These two librarians were concerned about the change because Overdrive has become such a popular service in Alaska, yet none of the libraries have added records to their catalogs. We are counting the

circulation from Overdrive, which can be reported for each library, but they cannot count the actual number of downloadable audiobooks because none have added records for Overdrive titles to their catalogs.

Neither of these libraries reports any E-Book holdings, so this part of the definition was never a concern before we added this stricture to audio and video.

Have any of you hit this problem with the change to audio and video?

SDC Comments

Juan Tomás Lee , UT

In Utah, we also use the definition that includes only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC) as Patience mentioned for Alaska. Several of my librarians have also raised the concern that they are not adding the records of electronic materials to their OPACs for the reasons Patience highlighted and it doesn't seem fair that some libraries get to count the NetLibrary holdings and some don't.

Bruce Pomerantz, MN

A committee of school librarians and I decided to classify audio and video downloading subscription services as databases for our annual school library report. Perhaps we need to broaden the public library definition of databases so that it includes resources as NetLibrary?

Susan Vittitow, WY

I thought we already counted resources such as Netlibrary as databases, if they weren't linked in the catalog. We count our NetLibrary in our holdings, as they're linked in the catalog, but we count MyLibraryDV (video downloads) as a database.

Capital revenue and expenditures

October 15, 2008

Question

Susan Paznekas, MD

I have a question about FSCS Elements 400-404 and 405 (Capital revenue and expenditures). The definition states that these are funds that are “designated by the community...”, “distributed to...”, “received by the library...” If a library system’s buildings are built by its local government but the funds for the buildings do not actually get placed in the library system’s budget, do they get counted in these elements?

Thanks for your help.

IMLS Response

In the near future, we anticipate having a coordinated response to these sorts of questions from the new IMLS Library Statistics Working Group. In the interim, IMLS will respond to these questions and solicit feedback/input/corrections from veteran SDCs and members of the 2008 PLSC steering committee.

Regarding Susan’s e-mail.....

We have attached the definitions for each of the items referenced in Susan’s e-mail below.

IMLS’ recommendation regarding the data element:

For Items 400-404 we recommend including countable revenue from public and private sources regardless of whether or not these monies were placed in the library system’s budget.

Rationale:

Not including this money would result in a systematic undercount of library capital investments at both the system and national levels.

As you all know, we are in a transitional phase for the library survey. The recommendation above is provided as a guide or general rule of thumb. If this recommendations differs substantially from past practice we ask that more experienced SDCs or and or members of the 2008 PLSC chime in with their interpretation of these elements.

SDC Comments

Bruce Pomerantz, MN

I refer to payments paid on behalf of the library as Indirect Expenditures. I have the libraries report this revenue for capital and OPERATING, such as cities that pay for heat, electricity, janitorial service, snow removal, etc. I have a separate budget line for Indirect with the following instruction:

Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Estimated costs are not reported in this category.

Rationale: Not including such operational money would result in a systematic undercount of library support at both the system and national levels.

I total the Indirect and Direct payments to create a total local revenue amount.

AND, I also instruct the libraries to report any Indirect Expenditures in the appropriate Expenditures data element, usually "Other," 357.

Rationale: Not including this money in Expenditures would result in a systematic undercount of expenditures, making it appear that the libraries were not spending a large portion of their operating revenue and they could get by on less funding.

Because we use Bibliostat Collect, I am able to have an edit check which serves as a reminder when someone enters an amount in an Indirect Revenue category.

Did you include this amount in Staff, Materials, or Other Expenditures?

Bibliostat question re law books

October 15, 2008

Question

“was wondering how law books that are updated annually and have supplements, etc., are counted. Should they be considered adult books or periodicals?”

Also, what would be an example of an electronic subscription (no. 7.9)?”

IMLS Response

If you are referring to data element number 450 with your law book question, you should categorize law books as periodicals. Read the following excerpt from the Public Library Statistics Cooperative (PLSC) online resource:

Serials include periodicals (magazines); newspapers; annuals (reports, yearbooks, etc.); journals, memoirs, proceedings, and transactions of societies; and numbered monographic series. Government documents and reference tools are often issued as serials.

As far as electronic subscriptions are concerned, data element 459’s notes are the most relevant:

<http://plsc.pbwiki.com/459+Current+Electronic+Serial+Subscriptions?SearchFor=subscriptions&sp=1>

Under this definition, a subscription to the online version of The Economist would be considered an electronic subscription, while a subscription to ProQuest would not because it is an indexing/abstracting database.

I definitely encourage you to take advantage of this online resource – its explanations of data elements are concise and useful: <http://plsc.pbwiki.com/>.

Thanks for your inquiry.

Library Service Area

2008

Question How do you determine whether or not all residents of a state live within a library service area?

Answer: If a state's unduplicated count of the number of people in its legal service area matches the number of people in its official state population estimate, then all residents of that state live in a library service area and all of its residents have access to some form of public library service. Unduplicated library service area population counts and official state population estimates for all states can be found in Table 1 of the Public Libraries Survey report for FY2006.

2009

Public Library (Reporting to PLS Survey)

February 27, 2009

Question

Edythe Huffman, IN

I have a library with 5 branches which meet the definition of a branch, per PLSC. However, the library only considers that they have 4 branches, since the one they don't consider a branch is only open 3.5 hours a week, is 250 sq ft, has only one paid employee and has a minimal collection. I don't care what they do for their own statistics; however, shouldn't I report to PLSC that they have 5 branches, since it does meet the definition of a branch? How do I explain the apparent anomaly? Thanks, Edie

IMLS Response

Edythe has sent along a very important and timely question. Here at IMLS we have been working with a trend file that collapses 10 years of PLS data into one dataset. In the course this work we are running into some problems in reporting "births and deaths" of libraries. This, as you all know, is a very important policy issue, particularly now as many in the field are challenged to provide services under seriously constrained state and local budgets.

In order for us to accurately characterize the number of working libraries (and closures) over time, it is very important that all libraries that meet the federal definition of a public library be consistently reported in the PLS, regardless of whether or not those entities report all of their data in a given year.

We are, of course, interested in having all of the data for a given library reported accurately. But our use of GIS/spatial analysis makes even those libraries that do not report all of their data valuable records for policy research. Here is why. Even if we only have the address information for a given library, we can still locate these entities in a given community and make some basic statements about the presence or absence of these resources across the country.

So, for example, if we wanted to count the number of library outlets in high-poverty, rural counties for a new partnership initiative with another federal agency, the only data we would really need for this type of analysis is the address field on the outlet file. But if a rural outlet was not included in the PLS, because local systems did not consider it "full-fledged" outlet based on **current** capacities, then we run the risk of systematically undercounting the community resources available in target communities - a serious problem for thoughtful, program planning.

I hope this long winded response addresses the question adequately. Please feel free to call or write if you have further questions or concerns.

SDC Comments

Bruce Pomerantz, MN

Discussion of altered outlets makes me recommend a new data element which cannot take three years to process. During this economic turmoil, we need to track not just how many outlets are being closed but if any are being converted to be run by volunteers or in some other way (homework centers that happen to have library-like resources) so that it no longer fits the definition. If this is occurring, we need to (a) know and (b) record because if the trend begins and gains favor among cost-cutting policymakers, the library profession will be more and more endangered.

Perhaps we can informally agree among ourselves to include a question for the 2009 data collection such as "Indicate the number of outlets that have been transformed into resource centers that no longer fit the outlet definition."

Other Comments

Christie Koontz, FSU

or also to simplify--when a library truly dies--permanently closes--retire the FSCS number.

Bob Molyneux

Christie, I don't think that will do much good.

A key variable (such as the FSCSKEY) is useful to help maintain consistency through the years. The XYZ Public Library after a few years becomes the Christie Koontz Memorial Library but it is the "same" library. Names change in all sorts of ways over the years (C.M. Koontz Memorial Public Library, Christie Koontz Public Library, etc. etc.) so a key variable would be useful if one wanted to look at trend data for individual institutions. However, the FSCSKEY does not do that function successfully. Anyone who is interested in the painfully excruciating details can go here: <http://74.11.214.110/statsurv/NCES/pldf3/index.html>*

The short story is that the FSCSKEY was used and reused and reused inconsistently over the 20 years the data currently span. It has gotten better recently but the damage is done. I would guess that the average library in the series (9,918 have ever reported through FY 2006) has two FSCSKEYS and a few have four. One, I recollect has 5. For a key variable to be useful, each library should have one and only one key any year it reports.

As some of you may remember, it took me about 18 months to put PLDF3 together and in the process, I developed a new key variable (cleverly named NEWKEY) to replace the FSCSKEY. PLDF3 has the original FSCSKEYs if you don't like what I did or want to check my work (and I would welcome that) but the idea of the NEWKEY is that each of the 9,918 libraries has one and only one NEWKEY any year it reports. It is a very, very difficult problem on two levels. One is the necessary code. (Take a look at the Schedule of Changes where the actual code used is available:

<http://74.11.214.110/statsurv/NCES/pldf3/schedule.html>). The other is ferreting out changes and trying to decide if Library A in one year is the same or different from Library B in another year.

I would suggest adopting and freezing the NEWKEY and, further, would suggest that the FSCSKEY be regarded as vestigial. And any help, then, on researching and making sure that NEWKEY is correct would be a contribution.

Everett may wish to weigh in on this matter. We have had some correspondence about the FSCSKEY and he is pursuing another line of inquiry, I believe.

And this begs the question of what the "same" library is. That is a tricky question as this thread has made clear.

*This is documentation of PLDF3 from FY 1987 - FY 2004. It has just under 165,000 observations. Each "observation" has the data for one library for one year. On the main page cited above and a number of pages linked off that site, the details that I limn here are discussed...at length.

This URL is where PLDF3 is currently parked after the closing of NCLIS. PLDF3 is the longitudinal data series I constructed from the NCES Public Library Statistics that reports data for individual US public libraries and it runs on this site from FY 1987 - FY 2004. I will shortly be loading the updated pages to a public Website with subsets of the data in spreadsheets, SAS files, and STATA (probably) files for those who want them. This updated PLDF3 will have data on these individual libraries from FY 1987 - FY 2006 for PLDF3. PLDF3 now has a bit over 174,000 observations and includes the new IMLS data.

The new Website will also include the update for PUSUM--the state summary data longitudinal file through FY 2006. This documentation is for FY 1992 -FY 2004:
<http://74.11.214.110/statsurv/NCES/pusum/index.html>

Neal Kaske, NOAA

I would suggest in addition to the coding changes an open (to SDC, Census, IMLS) Web log listing all of these changes (closings, down for repair, name change, etc.) be created. The data needs to be in one place, in a human readable format so a number of different groups who need access will have access.

2 cents from Neal

IMLS Comment:

Carlos Manjarrez, IMLS

Thank you for your suggestion. This should be relatively easy to implement.

SDC Comments

Grace Kelly, NY

I shudder to think of all the subcategories that would have to be created to really make sense of any "lists" of administrative changes we're talking about. - Grace

IMLS Comment:

Carlos Manjarrez, IMLS

Thanks, Grace. This is an excellent place to start. Could I trouble SDCs to send us an email listing the different types of closures and openings you've seen over the years? We will compile the list on our end and begin the process of coding them into discrete categories. Feel free to send your list to Kim, Everett or myself.

You can even send us your guess as to how many unique scenarios we'll see once we have assembled the list.

Thank you in advance.

SDC Comments

Nicolle Steffen, CO

I am shuddering with you, Grace. My 2-cents, the subcategories that include the list of possible administrative changes needs to be limited to a manageable, meaningful, limited list of options.

Other Comments

Bob Molyneux

I agree with Grace and Nicolle.

The series of data that are done under the Public Library Survey and historically through the FSCS are a remarkable accomplishment. When I started working at NCLIS with these data, I was struck by the work that was and is being done. I have done a lot of work with a lot of data and from several different domains. Library data are my home and the story is pretty grim about most data collection efforts. Not so with US public library data. I have great admiration and respect for your work. I hope some day, someone does a study of this series and before the principals pass off the stage. Meanwhile, this is the best series of public library data in the world. Period. My hat is off to all of you.

There are a number of things that led to this success and one has to do with the method chosen to add new data elements. It is conservative, bottom up, and it allows thought and discussion. It is not imposed

from above. A result, then, is that the few data elements collected are, generally, consistent over time and attempt to measure things that there is general agreement about. When the decision is made, folks within the system report that element and, in a year or three, we get something we can rely on. In five or ten years, we can look at trends. A series such as this one cannot turn on a time.

There is a second point about this specific question that I tried to get at: It is an exceptionally difficult thing to measure. That is, changes in libraries...closings, openings, marriages, divorces, etc. etc. There are, as I said, about 10,000 library systems that ever report within PLDF3.

There are 174,000 observations. I have looked at each one more times than I can count. It is a HARD problem. The problem just doing this work with systems took immense effort. I decided then that 16,000-17,000 outlets per year was impossible. That is, I could figure out and develop a method to keep track of systems that is relatively transparent. You can check my work and if I am wrong, tell me and I can correct it. Those 10,000 systems took me 18 months to figure out. 16,000 outlets? It would take years. I believe the library field does not have the resources for such an effort. If it did, would this be, as Mary Jo would ask: the hill you want to die on?

Molyneux's Rule #4 -- Data are a good servant but a terrible master.

Their value is in helping us understand libraries and the world around them. If we spend all our time collecting numbers about everything, we will never get any work done. For a series to exist for a long period of time, it should have the major variables that are important to the people who use the data and who pay for their collection.

What about Edith's Edythe's question? I cite my Rule #1: The true meaning of the fiasco in the Garden of Eden: Bad data.

We can't measure things perfectly. There are too many problems. What should one do? Do the best you can. Edith Edythe asked a good question and I think you in this community will puzzle out a workable method within the ambit of what you have done historically. I don't know the answer. I do know the question is a hard one. I also know you will puzzle something out.

Christie Koontz, FSU

I copy in Dean--who has also wrestled with this data--ck

Contractual Libraries

February 27, 2009

Question

Ron Winner, IL

Hi, Carlos. Here is a question that concerns me--I'm just forwarding it to you first. But I am also cutting and pasting in the response I received in the past ...

Here is my original message, with a couple of enhancements ...

Message #1 ...

Contract Libraries

I have a concern about why contractual libraries are not recognized federally as legal service units and are pulled from the federal annual statistical submission. Illinois has 18 legally established (by IL Library Law) libraries that contract with other libraries for service.

Those 18 libraries combined have a legal service population of 83,784. Those libraries have a library board, and it is the board's decision to contract for library service with another existing library (rather than reinventing the wheel and having a building, etc. of their own). Even though Illinois collects annual reports from these libraries, the data is not submitted federally (to NCES, IMLS) as a part of the annual submission because theoretically they do not meet the FSCS public library definition. However, pragmatically they do meet the definition--they are legally established according to IL Library Law, they have a legally constituted board of directors, they do tax for public library service, etc.--however, they just contract with an existing public library to provide those services.

- 1) an organized collection of printed or other library materials, or a combination thereof; (the library they contract with does have the collection)
- 2) paid staff; (the library they contract with does have the paid staff)
- 3) an established schedule in which services of the staff are available to the public; (the library they contract with does have an established schedule)
- 4) the facilities necessary to support such a collection, staff, and schedule; (the library they contract with does have the facility)
- 5) is supported in whole or in part with public funds (these contractual libraries do tax for public library service and in turn the taxes collected are paid to the library they contract with for service).

In Illinois we do count these as legally established libraries, and the 83,784 population is legally receiving public library services via contract.

When we calculate the number of Illinois residents not paying taxes for public library services we deduct that number from the "untaxed."

I'm not complaining, but I am just questioning why contractual libraries cannot be included in the federal submission. I realize technically they do not meet the FSCS definition but pragmatically they do.

Any insights would be appreciated.

Message 2--Response from Keith Lance:

Ron,

The definition of a library's legal service area has always included two ideas: the population the library is organized to serve (e.g., the city, county, or special district that primarily funds the library) AND--pointedly--the population of any area served *under contract*. Thus, when library service is being provided under contract, the people and, by extension, the associated money and service output, belong to the library that has the contract. That library is the one we expect to report about all of that. There has never been any provision for independent reports about contracts, apart from the actual libraries providing services contractually. The contract is not a library, as it must necessarily be with a library. To treat such contracts as if they were libraries in and of themselves would be to create 'phantom' libraries.

For what it's worth, this is how I have always viewed such situations.

Keith

Message 3--my response to Keith:

Keith thanks for your insight.

Actually, the library receiving the contract, as you pointed out, does report for the contractual service unit. You made a good point, however, in that the population has never been added into that "master/main library" population for FSCS purposes.

In Illinois the contract library does an annual report (brief) primarily to show board information (since they are legally established they do have a board) and the fiscal accountability (income/expenses: primarily from taxes and the state per capita grant).

Thanks, you have given Pat and I some information to consider for the future.

Now my message to Carlos:

Maybe it is now time to re-think this and allow us to report these legally established contractual libraries?

That area is "served, taxed" population and should somehow be identified in the national data.

What are your thoughts, Carlos?

IMLS Response

I'll start by saying that I my general inclination is to include more information about libraries and library services, not less.

From your description it sounds as though no data about the "contracted" library services are reported in the Illinois submission to Census. Is that correct?

Library Closures

February 27, 2009

Question

John K. DeBacher, WI

Being a SDC n00b, I had just posed a related question to my SDC mentor. What about libraries that, due to flooding last spring, are closed and are not sure whether they are re-opening? I also have a tribal library that is in hiatus--no board, no director, the system has them off the circ system, they have lost their state subsidized data line...

Al Zimmerman said I should report them as closed, then report again when they are open--but I am fairly confident all will be back in operation and won't have been closed for a full calendar year--but currently they are not active so I have no one to pin down for a report. Just submit partial data?

IMLS Response

After checking the survey documentation and conferring with Census, we've decided that you should report these 2 libraries as closed for the current data year and then restore them in the data year that they reopen (assuming they do actually reopen). By doing this, the libraries will retain their current FSCS codes when they are restored.

Thanks and let me know if you have any other questions.

Licenses or Databases?

March 9, 2009

Question

Thomas Ladd, NH

I received a question for which I would like your input:

"The Conway Public Library has compiled 7 databases of local vital statistics & cemeteries that are accessible from our web site. De we count them as local databases? Here is the link to the vital statistics: <http://conway.lib.nh.us/vitals/vitalstoc.htm> "

Our question 36a-d for this is Federal 454-457

The definition is "Report the number of licensed databases (including 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. "

As far as I can tell, these databases are not licensed, rights have not been aquired through payment (or SL or regional agreement) BUT, they certainly are databases as intended, and even with volunteers, creating the dbs has certainly cost the library something.

So, it appears that the question is whether the intent is to count databases, or licenses.

Can anyone with more history help with the intent of this question?

Thanks for your thoughts,

IMLS Response

The official IMLS response to this is the same as what Ira and Bruce have written in previous e-mails. These homegrown databases are indeed useful and certainly not "free", but cannot be included in the licensed database count since "...there has been no payment in the usual sense of the word. [Ira's words]"

This response will also be posted to the Wiki (Questions/Comments section) for future reference.

Thanks.

SDC Comments

Ira Bray, CA

I would not count these, there has been no payment in the usual sense of the word.

Bruce Pomerantz, MN

I would adhere to the formal definition with regard to what I submit to PLSC. However, in any state data and reports I prepared, I would include this number, perhaps distinguishing between vendor purchased and library created. I opine it would impress local and state legislators that a library has responded to local needs by creating what would never be provided by a commercial firm because of the limited money-making potential.

Do not say there was no cost. Tax dollars paid for it and should be so acknowledged. Every time we say that library materials are free, we diminish the argument to the public that operational money is needed and the funding source is your tax dollars.

Daria Bossman, SD

Hear, Hear, Bruce. I agree!!! I like "equal access" to everyone far more than Free. We have really done ourselves in with the overuse of FREE! It came back and bit us! Daria Bossman, SD

Howard Boksenbaum, RI

Tom--As you point out, these do not fit the definition of what we are counting, which are only commercial databases. I would not include them.

Inventory

March 9, 2009

Question

Scott Dermont, IA

I am wondering if any states have public library accreditation programs or annual survey questions that would require libraries to perform a full inventory on a regular basis. This was brought up in response to a question about how libraries determine the number of missing or stolen materials in a collection.

Personally I think it is a bit much to require that libraries do this to meet accreditation, but I wanted to see if anyone was doing this and what your experiences were.

SDC Comments

Daria Bossman, SD

I agree--a bit much. Like Iowa we have some (ah, many) tiny libraries which are just struggling to survive.

Even if we loaned them the equipment, the time and technical expertise to do an electronic inventory is just not feasible. Perhaps for top tiers to reach accreditation this might be required...perhaps.

Bruce Pomerantz, MN

Minnesota-No.

An interesting point, however. During my 15 years on the front line, I never participated in any such inventory. In these days of ILS, I would assume that when a book is declared missing or discarded, at some point someone deletes the electronic record.

We do ask the last year libraries purged their registrations.

Ann Reed, OR

We here in Oregon don't have PL library accreditation, but then, libraries get little state aid as well. Lacking a substantial carrot, the state library acts as resource, advocate, and cheer leader. I admit there are times we long to straighten out some collections, but we restrain ourselves.

Michael Golrick, LA

I think this rarely happens, although I do know of one Wisconsin public library which completes an inventory over the course of three years. They spend a few weeks each year doing a portion of the collection.

I think it will be more feasible with the advent of RFID, but several of the libraries I was involved with have collection sizes (and as Bob Molyneux pointed out, budget issues) which will prevent implementation of RFID until the unit prices of the tags drop dramatically. (Think about a collection of 750,000 items with a cost per tag of even \$0.50 – before calculating the staff time. That library began data entry on its collection in the early 1980s and finished in about 2001.)

Most places which have looked at loss rates use either the data from the ILS, or sampling of the collection (i.e. comparing a list of items which are supposed to be in a section with what is actually there).

Operating Revenue

March 25, 2009

Question

Scott Dermont, IA

I have a question about what we are actually asking for in regards to operating revenue. Our current survey has a question asking for both revenue received, and revenue expended as operating income. From what I can tell we are actually reporting the amount that is being spend as operating revenue. This seems wrong to me. I would think we should be reporting revenue received not revenue spent. We report the expenditures as well so I am a bit confused.

I am in the process of updating our survey for next year, so I'd really like to get it fixed. I just want to make sure I am not reading something incorrectly in the PLSC definitions. Here are examples of what our current questions look like.

"Federal Government Income, Received."

"Federal Government Income, Actually expended as operating income."

It appears as though the second line is actually the one being reported on the federal level. My proposal is to just use the first line and remove the second line completely.

I appreciate any help and enlightenment that I can get on this question.

SDC Comments

Michael Golrick, LA

I guess we divide our differently. We have Operating Revenue and Expenses and Capital Revenue and Expenses. Within income there is Local, State, Federal, and Other. The Expenses are by type not source of revenue. It is a little more detail than the reporting requirements, but we can easily report the aggregated amounts for the federal report.

Howard Boksenbaum, RI

We collect operating revenue by source and operating expenditure by object of expenditure.

Similarly, we collect capital revenue by source and total capital expenditure.

Although there are always some fuzzy areas, especially around computer equipment, in most cases, it is clear: large onetime expenses are capital and the funds they are paid for from are assembled from capital revenue.

This seems to fit with PLSC definitions as well.

Edie Huffman, IN

Indiana does the same as Rhode Island.

Dianne Carty, MA

Ditto for Massachusetts.

Book Sales Stats

March 25, 2009

Question

Susan Vittitow, WY

Someone had a question on the PUBLIB listserv about national used book sales and generated revenue. We break down "other" income for state purposes into fines, fees, etc., but not specifically for book sales, although we know they bring in significant money for some of our libraries. Am wondering -- does anyone collect library book sale data? I'm guessing "no," but it never hurts to ask.

Just curious!

SDC Comments

Debbie Wilson, DE

Delaware does not have a specific book sale item on the survey. The closest we get is under "other revenue" there is a separate item for fundraising events and in a parenthesis we say (Book sales, etc.). The library however can include any fundraising event in there, not just book sales.

Edie Huffman, IN

That would be a problem, since so many Friends groups sell the items and then use the money on the library's behalf, not always for their materials budget. It's something to think about, certainly.

Grace Kelly, NY

That is very much the case in New York as well.

Monetary Rounding

March 26, 2009

Question

Scott Dermont, IA

I'm wondering how monetary amounts on the survey should be rounded. I am assuming that we report whole numbers but is there a standard for rounding? We drop fractions, but I am wondering if rounding to the nearest is more equitable. Rounding up or down might be easier for those who are numerically challenged...

SDC Comments

Ron Winner, IL

In IL we ask them to round all to the nearest whole dollar.

IMLS Response

One would think this issue would have been formalized in the revenue/expenditure definitions, but it's not, nor does anything about rounding appear in the blog/wiki discussion threads

Going forward, let's keep things simple and round to the nearest whole dollar.

SDC Comments to IMLS Response

Edie Huffman, IN

That's what Indiana has done for years.

How the Use of Audio and Video Downloadables are Counted

April 1, 2009

Question

I'm wondering how the use of downloadable audio and video counted. Are they added into total circulation as if they were a physical item? Also, does the item have to be included in the OPAC for it to count towards circulation? There isn't anything under total circ that would lead me to think this, but I am making an assumption.

IMLS Response

Last week IMLS received the following question from an SDC:

"I'm wondering how the use of downloadable audio and video [are] counted. Are they added into total circulation as if they were a physical item? Also, does the item have to be included in the OPAC for it to count towards circulation?"

The answer to the question was not apparent from the data element definitions or from discussion on the wiki. The following answer was arrived at after conferring with the Data Standards Committee of the Library Statistics Working Group:

Downloadable audio and video should be counted as a part of total circulation; there is no requirement that such items be included in the OPAC.

Thanks for your time and attention. This question and response will be posted on the wiki as well.

SDC Comments after IMLS Response

Susan Vittitow, WY

.....Attached is part of last year's discussion on this. Also, I am looking at my FY08 WebPLUS user's guide, and under item 452 Audio, I read: "For electronic units, report only the items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC).

The same line appears under 453 Video.

So yes, there does appear to be a requirement that the item appear in the OPAC, by my reading of this. That's how we reported it in Wyoming.

Edie Huffman, IN

But aren't we talking about two different things, holdings as opposed to circulation.....

Ron Winner, IL

Yes, I interpret it like Edythe. Circ = Count (whether in OPAC or not) Collection/Materials Count only if included in OPAC

IMLS Further Response:

As the other folks who've responded to this so far have said, the question was about circulation, not collection sizes. The data element definitions for video and audio collections do indeed clearly state that items must be included in the OPAC to be counted as a part of collections, but there is no such requirement written into the definition of a circulated item.

Nicolle Steffen, CO

You'd want your collection count to correspond to your circulation count, i.e., you'd want to count your collection and it's circulation.

If you count circulation of non-collection items (not in the OPAC), the turnover rate is going to be all out of whack. To my mind circulation is directly tied to collection--it is the circulation of the collection the library owns.

Traditionally, items not in the collection should be counted in ILL, right? With the development of new technologies there may be a need for a third category.

Susan, Thanks for finding and sharing the clarification we got last year on 452 audio. I was flashing-back on that discussion because so many of the libraries here struggled with that concept.

Susan Vittitow, WY

That's my take on it, too. While I appreciate the clarification, I don't think it makes much sense to circulate something you don't actually "have" in the sense that it's been selected as part of the collection in some sense. I'm trying to wrap my head around how you "circ" something that you don't own and catalog.

Grace Kelly, NY

I agree with Susan and Nicolle.

IMLS Further Response (2)

The definition of circulation, as it is currently written, does not explicitly say that an item has to be included in the OPAC to be counted in circulation. The SDC membership on the data committee unanimously agreed with the response that was sent out.

Your position certainly has a lot of merit and there are clearly SDCs who side with you, but there is a process for getting data elements to be re-defined/defined more clearly and that process should be used if you would like to eliminate any ambiguity in how the use of downloadable resources is counted.

SDC Comments

Edie Huffman, IN

We obviously need to work on the definition, as a group, to make it consistent.

Susan Vittitow, WY

The more I thought about this... we count as circ physical things that aren't in the OPAC. I'm thinking of uncataloged racks of paperbacks, etc. I think what I'm trying to wrap my head around is the "frictionless" nature of downloadables, and the distinction of what is actually part of the "collection" in an electronic environment. Although I know we expect electronic resources to grow and we want to track that, we can get meaningless numbers from combining the two sometimes. I feel like we're trying to compare apples with sledgehammers when we try to make both physical and electronic resources play by the same rules and show up on the same bottom line. I've got no answers today -- only puzzlement and more questions!

IMLS Further Response (3):

It might be worth continuing this discussion on the Wiki, since there are so many strong opinions on this subject.

SDC Comments

Frank Nelson, ID

I'll second that.

Reference Question or not? (patron's circulation record)

May 11, 2009

Question

Susan Mark, WY

A question from one of my libraries, and I don't see a clear answer in the current definition.

Patron stops in and asks them to look up something in that patron's personal circulation record, such as what books they have overdue.

Reference question, or not?

They've gone round and round at their office, because the librarian DOES look something up for the patron, although it's in a non-public information source. It's not really a "directional" question, but my gut does not like this as a reference question.

My gut has been wrong before, though. SO, I will defer to whatever the ruling may be on this one!

IMLS Response

This is not a reference transaction. Seems closer to the realm of rules/policies, especially if it is a question about outstanding fines or overdue books, which are directly related to the enforcement of library policy.

SDC Comments

Daria Bossman, SD

Not!!

Ann Reed, OR

This is not a reference question. Yes, the librarian does look something up so there is a need, a tool, and trained staff, but the matter is one of record keeping convenience for the library and patron, not one of assisted information seeking.

Scott Dermont, IA

I agree with Daria's very succinct answer. Go with your gut on this one. I don't think we want to count every time a circ clerk is asked to look up a fine or change an address - which is what this could turn into.

Dianne Carty, MA

Not.

Post SDC Comments

Susan Mark, WY

Thanks to all who responded. I've let the library know that this is not a reference question.

Revolving Collections

May 5, 2009

Question

Scott Dermont, IA

This is in regards to revolving collections. A group of libraries get together and pitch in a certain amount of money to pay for a revolving collection. This collection or parts of it, then travels from one library to the next on a regular basis. Should each library in this consortium claim the total collection as theirs? Should they only claim those titles that they actually purchase? I think the problem here is that the money is pooled, so no library can claim a certain number of titles as "theirs." The problem is not with circulation, but with collection totals. This can actually have a large impact on smaller libraries. This seems to be happening mostly with audio books in Iowa. Many small libraries would have no audio books at all if not for this revolving collection. Please keep in mind that there are no library systems in Iowa like other states, these are independent libraries with separate budgets and collections.

IMLS Response

The answer to the question was not apparent from the data element definitions or from discussion on the wiki. The following answer was arrived at after conferring with the Data Standards Committee of the Library Statistics Working Group:

Pick a date (the end of the fiscal year comes to mind) and count all the books in the revolving collection that reside at a particular library on that date as part of that library's collection. Whatever date you pick, just be consistent with it over time. On average, this will give us a reasonably accurate snapshot of the resources that a library typically makes available to its patrons.

Downloadables and Catalogs

May 5, 2009

Question

Scott Dermont, IA

Here is a question that I got during a presentation about our upcoming survey. Can downloadable items (ebooks, audio, video) be counted as part of the collection if the library has the items cataloged in their CARD catalog or other form of non-online public access catalog (would that be a NOPAC?)... I admit to being caught off guard on that one. I think they are trying to find loop holes in the system. My inclination is to answer no – that the key word here is ONLINE. But I just wanted to make sure that the key word isn't CATALOG.

Thanks again for your help.

IMLS Response

After reviewing the data element definition, IMLS concluded the following:
The key word here is indeed online. Only report items that "...the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC)."
Thanks for your time and attention.

Post IMLS Response

Bruce Pomerantz, MN

I suggest that the sources of these items (audios, e-books, video) for which a library has a license (thus excluding You-tube and other networking sites) be counted as databases. We must acknowledge their existence.

IMLS Response (2):

There are certainly pros and cons to only counting downloadables that are listed in the OPAC, but we are in the middle of collection season and some states have already submitted the data. For the data we are collecting within a given year to have any value, we have to be consistent in applying the current definitions.

The current definition of 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." Strictly speaking, downloadable audios, e-books and videos do not meet this definition because the user is not manipulating the data for retrieval, so it would not be appropriate to categorize them as such.

The Library Statistics Working Group and the December SDC conference are the channels to use if someone is interested in formally changing a definition. We can continue to discuss the merits of the requirement that a downloadable be listed in the OPAC, but when it comes to the actual data submission, downloadable audio/e-books/videos must be accessible through the OPAC in order to be counted.

Post IMLS Response (2)

Tom Ladd, NH

I certainly agree that we can't change definitions in mid-stream, and I don't think that these are databases as we WANT them defined. I want to raise another issue.

My concern is that we have defined downloadables as a part of the collection, and are now counting them as that, YET we also say that they must be in the OPAC.

Why?

NH has a number of libraries offering downloadables to their patrons through an online web presence, but they still have card catalogs, not OPACS. They are providing the same service, spending the same money, providing access to the same "collection", but just because they lack an OPAC, we make an inequitable count amongst their counterparts.

I am not disputing that this is what we now do, but I would like to suggest that the proper channels reconsider the OPAC requirement.

SDC Comments

Michael A. Golrick, LA

So, if I hear you right, and to answer another question, you want the emphasis on "catalog" not on "online." Although I would argue that the "online web presence" could be construed as an "OPAC."

IMLS Response (3)

Fair enough. We'll discuss this during the next Library Statistics Working Group meeting.

Thanks for your input.

National Return on Investment calculation

June 10, 2009

Bruce Pomerantz, MN

At the December meeting, I propose that we consider an IMLS/PLSC joint project to create national return on investment calculations using the data we provide.

We also need to consider creating subsets of regional returns, given the differences in cost of living around the country.

This would not be a new data element but what should become a routine annual use --and subsequent promotion--of the data.

SDC Comments

Alka Bhatnagar, NJ

Yes, I would love it! There is so much interest in ROI now that this will be very useful. The data already exists, all we need are the relevant economic and financial indicators/factors for a meaningful ROI. Best,

Susan Mark, WY

My concern is that the field of ROI is not standardized enough, nor are individual communities standardized enough to create a meaningful number. If we're just doing a basic library value calculator, that's not really a good ROI. It's a good PR tool, but it's not what I would consider a number that would stand up to scrutiny.

Even things as basic as what the value is of a book circulation are more complex than they seem. For a book, what value is used? The average cost of a hardback? But with so many discount online sellers, it's rare that the average consumer pays the retail cost. The cost of the book to the library? This is going to vary widely (our libraries generally get 40% discount, but not all do), and this is not the value of the item to the consumer. Plus, if a consumer buys the book, they can resell it, so do we factor in that? In looking through ROI models, I've seen recommendations for book circ as low as 20-25% of book cost. Quite frankly, when I plugged in some of these more defensible numbers, I got negative ROI for some of my libraries. Yet, I know these are the same communities where the library is most important.

Books at least have some retail value. What about programs? Use of the library's computers? Meeting room uses? And the one that really strikes chills down my spine: the value of retrieving an article in our licensed databases. (ACK!) A lot of the library value calculators I've seen have no justification for the numbers they used on those types of things beyond saying they are "estimated."

Colorado did ROI studies on specific library systems, and came up with figures range from \$4.28 to \$31 return for each dollar invested. They surveyed patrons on such questions as how much they would have

had to pay for the information elsewhere. At a national level, I suspect we won't be able to do anything beyond a calculator, and calculators really don't show the value of small-town libraries. Small-town libraries are cost-intensive, but as some of the Colorado case studies showed, the library may be even more important there.

So, if we want to put up a national library value calculator of some sort as a "Yay! Go! Rah! TEAM!" PR tool, so be it. Let's just be aware of its limits. I have my doubts that we'll get any meaningful numbers out of it.

Edie Huffman, IN

I think you're right on the mark....

Bruce Pomerantz, MN

Toot toot toot. (That's me blowing my horn.)

That's exactly the purpose of this proposal--and the best time to introduce the PR tool would be during National Library Week.

Thomas Ladd, NH

I would be concerned for the possibility that a national calculator with different criteria might wind up contradicting the results of local and state level calculators. This could create negative PR.

Just a concern.....

Server Crashes and Survey

August 18, 2009

Question

Scott Dermont, IA

I have a library whose server crashed and lost all of their data between 2005 and April 2009. I'm wondering what I should tell them as far as filling out their FY09 survey? Should I just say to skip it for this year and wait until they have a full year's data? Or should I have them extrapolate off of the data that they managed to collect for 3 months? I didn't see anything like this on the wiki so I thought I'd email the group for advice.

Thanks in advance for any help that you can provide,

IMLS Response

After talking with the Library Statistics Working Group, the consensus was that the library should extrapolate using the three months of data available and use the past couple of submissions as a check that the numbers they're getting are reasonable.

Also, since this is a relatively small library, when it is practical for them to manually count elements such as the number of staff, or obtain budgetary/fiscal figures from other sources, we ask that you do so (this last part is just practical advice from IMLS and Census).

SDC Comments

Susan Mark, WY

Were it one of mine, I'd probably suggest that they make the best estimate they can using the three months of data they have left, and the prior year's data. I don't know if that's the correct thing to do, but it's what I would probably do.

Howard Boksenbaum, RI

I would suggest a straight line extrapolation as coming as close as possible. Is there a way to indicate that these data were estimated on the final submission?

Michael Golrick, LA

As you may remember, Louisiana (along with Mississippi, Alabama, Florida, and Texas) have had the experience of dealing with missing data with whole libraries blown away (literally). One parish in here (Cameron) literally had nothing left after Katrina.

Scott did tell me in a private note that the library had been doing back-ups, but they were not sufficient. I was going to make a snarky comment, but won't. I will say that as a public library director, and even with the back up procedures, there were some records (board minutes including financial reports and statistics) which were also put into print and, in one library, bound as a permanent record.

Now, I was not here in 2005, and with the number of issues resulting from two hurricanes, the institutional memory of how the statistics were handled is fuzzy. I did go and pull the state published report from that time. There is data for all libraries, so some of it must have been reconstructed and/or estimated. There is data in our reports for even the most heavily hit libraries, which makes me think that there was estimating done.

I expect that the official advice will be to estimate in the most reasonable manner possible.

Stacey Malek, TX

In Texas, we ask libraries affected by hurricane damage to simply do the best they can with reporting their statistics, including estimating. They put annotations into bibiostat explaining why numbers were off between years.

Edie Huffman, IN

We've done the same in Indiana. One of our libraries was destroyed by fire (arson, and the new library was only 2 years old), so all of their computer and most print records were gone.

Timothy Owens, NC

It seems like they should be able to treat data they have (or a fraction thereof) as a sample and be able to produce some meaningful numbers. Carlos discussed sampling at the conference last year and may have some ideas on a practical approach.

SDC Comments - Post IMLS Response

Scott Dermont, IA

I wanted to thank everyone who helped me with the server crash question. The consensus was to extrapolate, which is very logical to me. Everett from IMLS also followed up with me about this and also recommended extrapolation. Thanks again.

Counting Databases

August 24, 2009

Question

Howard Boksenbaum, RI

Hi all--

We are having trouble consistently counting licensed databases in RI. Here is what I have proposed and would like your comments on:

454 local - this one is easy: how many databases does the individual library subscribe to and pay for itself.

455 State (state government or state library) the state agency will provide this number. We are actually purchasing from EBSCO, ProQuest and Tutor.com databases (services in Tutor.com's case) a number of statewide database licenses that are available to all state residents through a grant to the Providence Public Library. These are designed to be available all through local RI libraries as well as from home, school, etc. We plan to count every database separately and each local library will enter the same number.

456 Other Cooperative agreements. Ocean State Libraries, Inc., the not-for-profit consortium that operates a ILS for all of the state's public libraries also buys database licenses from a variety of aggregators. We plan to count each of those databases separately as well; local libraries obtaining the appropriate number from the consortium.

Is this how others are handling these data?

SDC Comments

Michael A. Golrick, LA

Hi-That is what we do with one exception. In the data collection software we enter the number that the state provides and then "lock" it so that it can not be modified by the local library. The software then automatically tallies the database total (as it does for a number of other fields which call for addition).

Rob Geiszler, VT

This is exactly how we collect this information in Vermont. I didn't make this procedure up. The first year that I was responsible for the report, I posed the same question and other SDCs, as well as the Census people, indicated that this is the correct way to collect the data.

You have good instincts.

Frank Nelson, ID

It is much easier to have the state database field locked and then enter the same number for everyone. Could work for other state provided access too if one decides to set up the form that way. Less confusion.

Howard Boksenbaum, MLIS, RI

Thanks, Michael. Good idea. Is you state total then the sum of all; i.e., the produce of the state number x the number of libraries?

Despina Wilson, DE

Wouldn't this grossly duplicate the number of electronic databases (in the sum as a state)?

On the state library report, I report the number of databases that the state library purchases on behalf of the public libraries.

On the public library report we report -1.

Ann Reed, OR

Yes, it does result in a useless state total. But consider the use to which the data is put. It was felt at the time that since most library funding was local, the more useful number was the number of items the public library patron had available to them as they walked into their public library on June 30.

Michael A. Golrick, LA

Yes it is.

I probably should have also announced that our 2008 statistical report is up on our web site here: http://www.state.lib.la.us/la_dyn_templ.cfm?doc_id=278

Our tradition has been to offer the current year as a spreadsheet, but prior years are all PDF files. We have 2000+ on the web site.

Scott Dermont, IA

We have been way underreporting our databases for 455, so this year I am pre-filling for libraries and then locking it. So far it is going quite well.

Bruce Pomerantz, MN

I have several multicounty regional systems license databases for their members.

Informata/B&T in Collect has the ability to enter different numbers for the libraries in different regions and lock the data, which I learned, like the rest, was necessary.

Kathy Sheppard, SC

South Carolina does exactly what Michael does.

Edythe S. Huffman, IN

As does Indiana

Alka Bhatnagar, NJ

So does NJ.

Dianne L. Carty, MA

Ditto for MA.

Grace D. Kelly, NY

NY will be doing that this year.

Genny Carter, TN

We also count databases that way. For now, I do not have that field locked in Bibliostat, but that is a good idea, and will do so in future studies. We currently supply them with the number, they enter it, and I spot check for accuracy.

Ron Winner, IL

IL will be doing that this year as well.

Jay Bank, KY

In KY our report heading reads "State (State Government or State Library) ** Include 30 KYVL databases **," since all libraries have access to these 30 databases at minimum. Of course we still have a few libraries that will, for some unknown reason, enter "0."

Scott Dermont, IA

That's why I've had to pre-fill and lock our question. We have 2 databases (EBSCOhost and FirstSearch) where libraries can opt in for a small fee. In the instructions I tell them to count EBSCOhost as 13 and FirstSearch as 12. You would not believe the variety of answers that I got. So this is the first year we've pre-filled and locked this field. I think it works much better this way.

Holly Van Valkenburgh, NV

This is what we do in Nevada.

Capital (in-kind)

September 1, 2009

Question

“A library received a [competitive] grant to pay for an honorarium. The grantor paid the honorarium directly. The library did not see the money at all. I’m thinking this qualifies as an in-kind service, but I just wanted to make sure. I think this means that the library should not report it.”

IMLS Response

The answer to the question was not apparent from the data element definitions or from discussion on the wiki. The Data Standards Committee of the Library Statistics Working Group determined that this grant funding should be considered an in-kind service and should not be counted as a part of the library’s revenues, because the library did not actually receive any money in this transaction.

Public Access Internet Computers

September 2, 2009

Question

Susan Mark, WY

Do laptops or PCs that are only used for learning labs count as public access internet computers? I'm thinking no, but could use some feedback on that one. They're being used by patrons, but only in formal classes.

(IMLS) In the resulting discussion, this question also arose:

Should PCs that are internet-wired, but can only be used to search a web-based OPAC (because they are locked down to prevent further web-browsing), be counted as public access internet computers?

IMLS Response (after comments):

The Data Standards Committee of the Library Statistics Working Group determined that neither of these 2 categories of PCs described above should be counted as "internet computers used by [the] general public". The reasoning is that since we seem to be most interested in the extent to which a user can use a library facility to access the Internet as he or she would use similar facilities at home, for an internet PC to be considered public access, all of a library's service community should know of its availability all the time rather than the maybe/perhaps use of a computer in a lab or one used primarily as an OPAC. Simply stated, a public use computer is a unit available at ALL times the library is open to the public.

This is a very important data element, so to avoid future confusion, a discussion of its wording might be helpful in December.

SDC Comments

Terri Assaf, MI

No, public access computers are those the public can access without staff intervention.

Katina Jones, MO

I agree with Despina on #3... Patrons aren't required to bring their own laptops to participate in classes offered by the library, right?

Michael Golrick, LA

Because we have not counted computers by branch, I am going through this process informally now. (Yes, we are adding it for next year's state survey, but that won't be in for 6 months, and we will need the data sooner.)

I am surprised (but pleased) at how many have laptop labs, and we are counting them as public computers – and at the risk of opening a different can of worms, we also count as public PCs, OPACs which use the web to search the catalog (even if locked down to prevent further web browsing). While sometimes what we care about is hardware, sometimes it is also about bandwidth and a PC using a browser to search a home library catalog on the web still uses bandwidth.

Terri Assaf, MI

Yes, it can and often does happen, but staff assistance is not a requirement, as in the case of a computer lab.

Despina Wilson, DE

However, staff intervention can happen with any public access computer. A staff person in one of our libraries once sat with an older gentleman to show him (basically train him) how to use e-mail so that he can communicate with his son in Iraq.

IMLS Response

The definition of that particular data element is the following: "Report the number of the library's Internet computers [personal computers (PCs) and laptops], whether purchased, leased, or donated, used by the general public in the library."

If patrons can only use a PC if they are enrolled in a particular class, then it would seem like that PC wouldn't be included in the count, since it's not truly available to the general public.

Hulen Bivins, AL

In Alabama, we do NOT allow the counting of lab units. We count only computers available at ALL times to the public that the library is open to the public. Additionally, we do not allow the counting of any staff computers even though in an emergency such could be used by the public for a specific purpose. We do allow the counting of designated computers that are available at all times to the public. Herein an example would be a computer(s) in the genealogy section designated for ancestry research only.

Again, the diversity of the states is shown and makes one wonder how we (SDCs) all get along so very well!

Bruce Pomerantz, MN

Minnesota does NOT count terminals that can only access an OPAC as a public internet computer, even if it is a web-application catalog. I opine the intent of the data element is to determine the degree that people can access the entire WWW. To count an OPAC-exclusive terminal as having access to the Internet is akin to counting someone with a visual problem so as to be able to only distinguish shades of black and white as sighted.

Katina Jones, MO

Not that I want to disagree with my mentor (sorry Hulen) or split hairs with Everett, but the definition says nothing about only counting PCs that are available to the public at ALL times the library is open. Does the phrase "General Public" imply a timeframe?

Discards -- count as part of the collection?

September 2, 2009

Question

Susan Mark, WY

Discards -- count as part of the collection? I think no, as when they're discarded, they've effectively left the collection, even if Elvis hasn't left the building.

SDC Comments

Despina Wilson, DE

I agree with your first and second answers.

Terri Assaf, MI

discards - not part of collection

Missing items – count as part of the collection?

September 2, 2009

Question

Susan Mark, WY

Missing items -- count as part of the collection? I think yes -- until the decision is made to mark them lost, they're just as much part of the collection as items that have been checked out.

SDC Comments

Despina Wilson, DE

I agree with your first and second answers.

Terri Assaf, MI

missing - yes, part of collection (until deemed lost for ever more);

Other items in the library's collection

September 2, 2009

Note:

Susan Mark, WY

...this library pointed out something I'd never noticed before. There's no data element where we collect "other" items in the library's collection. Her question came up in terms of computer programs they circulate. I've seen list discussions on PUBLIB where they talk about all the oddball items libraries circulate -- puzzles & games pretty common, but have also seen tools and candy molds and all manner of other things.

SDC Comments

Bruce Pomerantz, MN

Minnesota does have an "Other" for miscellaneous items in the collection. I raised this issue early in my tenure but didn't have much, if any support, on the matter. Perhaps that we now count non-corporeal items as electronic serials, databases and e-books, we should revisit counting non-traditional physical items.

Bibliostat Question Fwd: MyLibrary DV downloadable tv shows and movies

October 13, 2009

Question

Genny Carter, TN

The question below seems to be related to earlier questions about downloadables. How shall I answer them?

The library subscribes to MyLibrary DV for Downloadable tv shows and movies. Do I count it as a database since it is a subscription service?

IMLS Response

The answer to Genny's original question can be found on the Wiki:

<http://plsc.pbworks.com/Downloadables-and-Catalogs>

Count these shows and movies as a part of element 453 (Video) if they are accessible through the library's OPAC.

The current definition of 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." Strictly speaking, downloadable audios, e-books and videos do not meet this definition because the user is not manipulating the data for retrieval, so it would not be appropriate to categorize them as such.

Diana Very, GA

In our survey we have a place for databases and a place for electronic subscription services so we would put that product as an electronic subscription. service.

Michael Golrick, LA

I have a pending email, which asks what I interpret to be the same question. Here is how the Louisiana library framed the question:

Our library recently started providing access to OverDrive to our patrons and I have a question about how to report OverDrive circulation statistics when we do our state report. Our patrons have access to audiobooks, eBooks, music, and video through OverDrive. Where do we include the circulation statistics for each of these categories on the state report. Do they all go under "Other"? Do we count these just as we would items in our physical collection?

Susan Mark, WY

I thought the distinction was whether the downloadable audio & video items were in the catalog or not. So for us, our Netlibrary eAudiobook titles have records in the catalog, therefore they count as titles on our audio, and we count the titles under audio and we include it in our circulation. For MyLibraryDV (when we had it - recently discontinued), the only way to find out what titles were in the database was to go directly to MyLibraryDV, therefore it was a database, and its use did not count under circulation.

I've said it before, and will say it again -- lumping physical & electronic audio together (and video as well) produces nothing but absolutely useless numbers. Putting the two together is like comparing apples and sledgehammers. Knowing that every library has "a gazillion" video titles tells me nothing about the struggling library that desperately needs to update its AV. At the state level, I split it into physical and electronic, but we don't do that at the national level. I'd like to see us do that.

Circulation: Total, Children, and do we separate out Young Adult?

October 13, 2009

Question

Holly Van Valkenburgh, NV

Since PLSC went to Children's and Young Adults for programming attendance, should Children's Circulation also be the two groups?

IMLS response (to Holly):

Our understanding of the children's circulation data element is that it is neutral with respect to age. That is, the circulation number is based on the movement of children's holdings, not the age of the patron checking out the material. Indeed, the definition expressly says that it refers to circulation of children's materials "to all users" (see below). In short, there would be no reason to redefined the children circulation element for people 11 and under.

Wording of children's circulation data element: The total annual circulation of all children's materials in all formats to all users, including renewals.

2/4/2010

Question

Bruce Pomerantz (MN)

I received one query asking where to place the YA circulation or if there was going to be a separate YA circulation category.

IMLS Response

To answer the question you received and posted to the SDC list, "where to place the YA circulation or if there was going to be a separate YA circulation category," please reply that YA circulation is not a PLS data element and there is no need for libraries to collect and report YA circulation as part of the national reporting program.

[551 Circulation of Childrens Materials](#)

[550 Total Circulation](#)

Materials Processing Fees Question

October 16, 2009

Question

Nicolle Steffen, CO

This question came up the first time probably six or seven years ago and I got clarification at that time. But now, years later, I can't find anything in the definition or on the wiki (perhaps I missed it?). So, I'm hoping the group can help me verify and/or clarify reporting materials processing fees.

I thought I remembered that the cost of materials processing done by a vendor (under contract) should **not** be included in materials expenditures (data elements 353-356), but rather under "Other Operating Expenditures" (357). I've poured over the definitions and materials processing seems to fit best under "Other Operating Expenditures," which states:

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

Any and all help appreciated.

SDC Comments

Diana J. Very, GA

I would think that the processing fees would be part of the cost of the materials. If you buy equipment the cost of shipping and set-up is part of the capitalized cost of the equipment. So I would say that whatever it costs to get the materials to the library would be part of the materials cost. Just my opinion.

Dianne Carty, MA

In Massachusetts we do not include those expenses as materials expenditures in our data collection.

Circulation: Check outs and Check ins?

October 27, 2009

Question

Katina Jones, MO

(Question directed to IMLS)

Short question today from the Public Library Survey that I cannot find an answer to:

Total Circulation and Children's Circulation – should these figures include check outs and check ins?

Please advise.

IMLS Response

Circulation includes check-outs and renewals, but not check-ins.

550 Total Circulation

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

Note: Count all materials in all formats that are charged out for use outside the library. Interlibrary loan transactions included are only items borrowed for users. Do not include items checked out to another library.

[550 Total Circulation](#)

2010

Freegal (music service) – how do you count download

August 27, 2010

Question

Edie Huffman, IN

From a Library Director:

We have subscribed to a new service, Freegal, which allows downloads of songs. Each download/checkout is one song. We are wondering how to accurately record the statistics since a checkout of a CD would have multiple songs and this is only one song. Any advice?

Edie:

It looks to me as if it would be one circulation per song? Any advice, suggestions, other opinions?

Thanks, Edie

SDC Comments

Susan Mark, WY

That'd be my take on it.

Rob Geiszler, VT

Does this depend upon their cataloging? If the individual songs are cataloged, I'd count the individual items. If they're not cataloged, I'd be inclined to count Freegal as a database. I kind of remember a discussion about this a couple of years ago with respect to downloadable audiobooks.

John DeBacher, WI

Personally, I don't know what Freegal would count as. I look at it as akin to taking library funding and giving it away. It reminds me of those who suggested in years past that libraries should quit collecting books and should instead just let patrons select things from Amazon.

Here's the LJ announcement on the Sony scheme:

<http://www.libraryjournal.com/article/CA6723898.html>

and I just discovered some subsequent discussion (long link warning):

<http://blog.libraryjournal.com/ljinsider/2010/07/19/the-debate-over-freegal-does-innovative-free-music-service-represent-the-downfall-of-the-library-lending-model/>

I don't see much that resembles circulation of library materials.

--The library does not own anything—it just buys bundles of downloads.

--The library does not select anything—the patrons have access to the entire Sony catalog.

--The library does not catalog anything—if it did, it would catalog all of Sony's songs (have fun, technical services!).

--The library does not "circulate" anything (if you consider circulation in the "loan" sense of something being used by an individual and then subsequently available to another).

The patron selects a song, the library "buys" it for them, and the patron doesn't give it back, nor does the use sunset. If another patron wants the same song, the library essentially "buys" it again. I wonder if the library can track use to the individual user. Perhaps so, since patrons are limited to 20 downloads per week. But that would be a critical factor.

I know many states and some of the state officers are anxious to count everything possible to justify library funding, but I think we need to look carefully at collecting and maintaining statistics that are useful and comparable in the long run.

I think mixing and counting "virtual" usage with traditional, physical circulation is a mistake and we should distinguish and segregate the two, just as we have distinguished e-books, and now downloadable audios and videos. Physical materials and physical circulations have different costs and bearings on the "library as place" than do virtual items. They require different staffing, storage, and space needs calculations. I do not disagree that we need to track and count use of virtual activities. But if we give them the same weight and bearing as we do services and activities in our libraries, we ultimately undermine the value of the library as "place" and risk bolstering the argument that physical outlets are no longer necessary.

More on Freegal: [http://plsc.pbworks.com/w/page/39012840/Freegal-\(music-service\)](http://plsc.pbworks.com/w/page/39012840/Freegal-(music-service))

One-On-One Activity Counts

Posted on Wiki Original (2010):

Bruce Pomerantz, MN

I asked my libraries what additional data elements they opine should be added. One responded, Perhaps consider including programs for children that are of a one-on-one nature. Our library offers two excellent programs in which children have a weekly one-on-one reading experience, Come Read with Me at the Library and READ (Reading Education Assistance Dogs).

I am not enthusiastic about this as recommended. However, similar to my suggestion below about the changing nature of library outlets, should we consider counting the one-to-one activities that we exclude from the programs definition? Newer and renovated libraries now have enclosed study spaces for small gatherings, such as tutoring, tax filing assistance, small business advice, along with the two examples the librarian volunteered, which may occur in the children's area.

Yes, it's a can of worms, which is why I don't have a specific definition and am throwing this out as a brainstorming idea. Still, WE know libraries provide these services but the policy makers, excluding library boards, most probably do not.

Does anyone know of a library that has tracked this?

Is this something we need to tout nationally or leave it at the state and local level?

Counting less than a branch and more than a book station

Posted on Wiki 2010

Bruce Pomerantz, MN

Is it time to consider counting outlets other than bookmobiles, branches and stand-alone books by mail? Minnesota public libraries are expanding ways to provide library services beyond the traditional central library or branch. Much as I would be prideful in considering Minnesota to be highly inventive, I'm betting that other libraries have similarly expanded, especially as shrinking budgets and increased demand create the conditions for Necessity to become the mother of Invention.

In one instance, a multi-county Library A has opened up outlets in municipal buildings with regular hours, mid-size collections, computer terminals and highly-trained volunteers who will telephone for assistance if they cannot assist someone. These volunteers are supervised frequently by a paid staff member. The only missing criteria is a salaried staff always on duty.

Multi-county LibraryB eliminated its bookmobile service. However, the former bookmobile stops now have a small library collection within a municipal building. The former bookmobile librarian now drives to these former stops, brings requested books, and is at the library for several hours, before moving on. This innovation meets the outlet criteria of having an organized collection, a paid staff member and regular hours, albeit perhaps two or three hours a week.(I don't know for sure but let's assume for the sake or discussion that the books are in "separate quarters," such as a small supply room.)This innovation qualifies as a branch but it does not offer what we typically think in terms of amenities, programs and services.

Soon, a library will experiment with a self-serve kiosk similar to Redbox video rentals. Swipe your library card and voilà a circulation occurs.

These alternative delivery methods, though they may evolve, are going to be with us for quite a while, if not permanently.

Do we need a fourth service delivery category that is broadly defined to cover these alternative methods?

Susan Mark (Wy)

Wyoming already collects what we call Other Public Service Outlets. Our definition: "Other public service outlets are locations to which library materials are distributed for lending but at which there is no permanent collection or library staff. Do not report bookmobile stops. Include collections in nursing homes, jails, etc. Enter the total number of other public service outlets in the space provided." Could be valuable info as libraries innovate to try to provide public service both with leaner budgets and changing patron expectations. Could also be a challenge to define and collect consistently, as there seem to be so many different service models along these lines. Perhaps we could look at whether a non-branch outlet has one or more of the 4 criteria for a full branch?

Grace Kelly (NY)

NY's report asks for "Other Outlets" with a given instruction, "Examples are outlets in senior citizen centers, daycare centers, jails, or other organizations or institutions with designated space and with frequently changed collections of books and other library materials". We had 108 reported "other outlets" in 2008.

Number of Weeks a Library is Open

September 22, 2010

Question

Lynn F. Shurden, MS

Yesterday I did a workshop for the public libraries regarding the 2009/10 submission of data. The new element of number of weeks the branch library is open was discussed. In the definition, it reads: Extensive weeks closed to the public due to natural disasters or other events should be excluded from the count.

The question arose as to whether one would count "weeks closed" if it was for moving a library collection or inventory of a collection? What about all a/c being out for 2 months in the summer in Mississippi and the branch was closed??? What say ye??

SDC Comments

Genny Carter, TN

We have a number of libraries that were closed for renovation or moving, so I am anticipating questions as well as I begin workshops - tomorrow - by webinar for the first time. (I'm admittedly rather nervous about conducting this training by webinar with PowerPoint and screen shots - but it's saving the state some money not to have me travel to our 12 regional libraries.)

My understanding is that our renovation/moving closures and Lynn's examples are the types of "other events" that the new element is designed to capture - with the goal of determining how many weeks the public had access to the library. Since the library was closed for that "event," then those weeks are not counted - "excluded from the count" - just as they would be if the library closed due to the destruction of a natural disaster. The library was closed. It had no patron visits, programs or circulation (most likely), and the new element will help capture the reason for the decline in their counts.

Rob Geiszler, VT

Both of those circumstances ought to qualify as weeks not open.

Peter Haxton, KS

Genny hit the nail on the head. Part of the intent of the data element was to even the playing field to explain variations in library use that are caused by closures. I would say that any time a library is closed during its normal business hours for more than a couple days, the weeks open element should account for that closure.

Maria Hazapis, NY

New York has asked the following question for over 10 years (we added this question during my first 'round' as SDC). The responses have helped us understand any events that impact the library's statistics.

"For the reporting year, has the library experienced any unusual circumstance(s) that affected the statistics reported (e.g., natural disaster, fire, closed for renovations, massive weeding of collection, etc.)? If yes, please annotate explaining the circumstance(s) and the impact on the library using the State note.

Bruce Pomerantz, MN

I thought the original intent, by excluding the natural disasters and other events, was to determine how many libraries were being closed for weeks at a time exclusively due to financial pressures.

Susan Mark, WY

I must have missed something. It was my understanding that natural disasters were one of the reasons we wanted to track this. Eg. Hurricane Katrina – libraries closed months on end, stats (obviously) take a dive. Feeling was that it wasn't a valid comparison to look at library A open all year vs. library B forced to close half the year. I'm not sure when natural disasters got excluded.

Katina Jones, MO

It makes me nervous that we all are focusing on different parts of [the definition](#)... I thought the last couple of sentences made it pretty clear:

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.

Based on that part of the definition, I set my questions up like this:

2.28a	Was this outlet closed at any point during this reporting year for 4 or more consecutive days (or for more than half of its scheduled hours for a given week)?
2.28b	If yes, for how many weeks was this outlet closed? If no, enter 0.

I then plan to subtract the figure provided in 2.28b from 52 to come up with the number of weeks the outlet was open during the reporting year. Thoughts??

Stacey Malek, TX

I didn't think it mattered why the library was closed, based on the definition. I think how you set it up will work. I simply quoted the definition in our instructions and asked how many weeks the outlet was open. Depending on responses this year, I may change it to something similar to yours next year.

IMLS Response

The data element in question focuses on the number of weeks a library is open for business. The definition does not suggest that natural disasters should not be counted. Rather it says that extensive weeks closed should be excluded from the weeks open count. In other words, if a library is closed due to a natural disaster or some other reason, the corresponding number of weeks it is closed should not count towards calculating the number of weeks it was open that year.

As for the interpretation of the variable, we will not be able to distinguish from this variable alone whether or not the closure was due to a natural disaster, financial hardship, renovation, failure of a building's heating/cooling system or some other reason. However, this information will allow us to qualify the other statistics provided in a way that is reflective of the actual amount of time that an outlet was open.

I guess the word "excluded" may be throwing some people off, but here we mean that extensive time closed to the public due to natural disasters or other events should not be counted – they should be "excluded from the count" of weeks open.

Hopefully, this clears up any confusion, but let us know if further clarification is needed. Thanks for all of your thoughtful responses.

2011

Is an immobile bookmobile a branch?

January 3, 2011

Question

John DeBacher, WI

One of our libraries had operated two bookmobiles. Then, as one got less road-worthy, it was left parked at a single location (the library then reported it as an “other service outlet” on our annual report). Now, due to budget considerations, fuel costs, etc., both bookmobiles are parked at permanent locations and are referred to as “satellite outlets”:

<http://www.fdlpl.org/aboutus.html#satellites>

I (and the library director) are inclined to declare them branches. They have fixed locations (separate quarters—even their own electrical meters, phones, T-1 lines, and billing address), organized collections, paid staff, and regularly scheduled hours.

I don't see them as bookmobiles anymore, since our bible says that a bookmobile is “a traveling branch library,” and these don't travel. Does that make sense and has anyone else faced this situation?

SDC Comments

Terri Assaf, MI

Tell them it only counts as a bookmobile if it has wheels. If the wheels haven't been removed yet, someone can go let the air out of the tires.

Ron Winner, IL

Makes sense to me.

Ann Reed, OR

Oregon has one of these too. I call it a branch, not a bookmobile, as it is on blocks, and located in the parking lot of a service station. It meets all the criteria of a branch – staff, collection, normal hours, has utilities, and is operated just like a site-built branch. I think of it kinda like a mobile home - - - not really mobile, not site-built. -

Bruce Pomerantz, MN

Since libraries are being hit by financial tsunamis, perhaps we can call these Financially Embattled Moribund Automotive (FEMA) libraries.

Library Branches on School Sites - should they be counted as public libraries?

Question referred to IMLS by SDC (January 11, 2011):

**IMLS to LSWG Data Standards Committee:
January 24, 2011**

We have a couple of questions from an SDC that need to be answered (see the Background section below for more details), please send us your feedback when you get a chance:

1. Should the 4 library outlets in question be considered public libraries?
2. Should the reference questions answered at these 4 outlets be counted towards the El Segundo Public Library's total reference transaction counts?

Background

The El Segundo Public Library has one main library and claims four branch libraries. The four branch libraries are located at school sites. The El Segundo Public Library has a contract with the school district to provide services for these sites. This includes collections, staffing and use of the integrated library system for access, cataloging and circulation. Reference services are provided to the students although the staffing at the school sites is only done by Library Technical Assistants, not librarians.

The four school site libraries are not open to the public for any scheduled hours. The library director said that a member of the public may, upon contacting the school site library and making an appointment, obtain a book from the library. As part of the State Education Code all visitors to public schools must also sign in at the school office before entering school property. The text below from the school district, however, indicates that the books are ILL'd to the main library. No mention of these four school sites is available on the El Segundo Public Library web site, only the main library location and hours (<http://eslib.org/>).

Another question involves the same library's reference counts. The library director may make the case that since the school site staff are paid from the library budget (albeit under a contract) that the library is in fact answering those reference questions and that they should be included in the total reference questions reported by the public library. Would that be correct?

The SDC believes that since there are no scheduled hours for the public and there is no information about these sites offered to the public these four school sites are strictly school libraries, not public libraries per the definition. Additionally, they believe that reference questions in a school library are not comparable to reference questions in a public library and that it would be including apples with oranges. No matter that school site staff are paid public library employees the counts should not be included.

LSWG Data Standards Committee Responses

Peter Haxton, KS

I agree with the SDC. According to the definition of a branch, it must have "Regularly scheduled hours for being open to the public." These are not open to the public. If those are not branches, then I would argue the reference questions should not be counted.

Edie Huffman, IN SDC

No and No. We have definitions, and these branches don't meet them, so nothing should be counted.

Bruce Pomerantz, MN SDC

I agree with the SDC: These four school libraries are not public libraries and nothing about their operation should be counted for the national statistics.

I always tell the Minnesota libraries that if they consider not including data as unfair and misleading that they need to keep two sets of data: One that they send to me and another that they use for their presentations to their local policymakers. I mention they need to explain at the presentation why the state numbers and their numbers don't align.

Minnesota does have to joint public school/public library operations and one academic/public library operation. By law, these libraries have to have their own entrances directly onto the sidewalk/street and the public has access to the library when school is in session. Because of these conditions, we don't ask them to differentiate between during school reference questions and after-school reference questions asked by children.

Howard Boksenbaum, RI (COSLA)

I agree with the SDC. Libraries may contract to operate many things that are not themselves public libraries. The fact that they are run by a public library does not make them public libraries. These four entities are school libraries.

Video Games & Video-Physical Units

February 7, 2011

Question

Bruce Pomerantz (MN)

What are people's thoughts concerning whether video games fit into the Video-Physical Units category?

Minnesota has an "All Other Physical Objects" category (read: miscellaneous) which is where I instructed the library to place its collection. However, the Video-Physical Units doesn't exclude interactive games even though we were probably not thinking in terms of interactive video games. Additionally, how do we define interactive? Is it interactive to have the option of viewing on a DVD the movie theater version but also decide whether or not to see out-takes, explanations on how a scene was accomplished, alternative endings, the director's cut, commentaries by the actors, etc? Or interactive occur only when actions by the viewer/player affect the subsequent developments? (Am I getting close to associating the library reports with quantum mechanics viz Schrodinger's Cat?)

One might argue that having options on a DVD is no different than having the interactive options of reading portions of a book or the entire book. However, a book and a video are not the same medium so I reject that argument.

SDC Comments

Scott Dermont (IA)

I see video games as a very different medium from DVD/video. Watching a video is a distinctly non-interactive activity. Choosing to watch different parts of a DVD is not the same as the interactivity found in a game – it is more like changing the channel. To me a print analogy would be the difference between playing Monopoly and reading a book. Or to keep it as an electronic example, playing the WII version of Monopoly is a very different experience and format to watching the Special Edition DVD on the manufacturing of the Monopoly game. No matter how much content there is on DVD, there is no interactivity other than that of changing to a new track. A video game a distinct format that is separate from either audio or video recordings.

In Iowa we have a separate "other" category where we ask libraries to report things like this. I would definitely have our libraries count video games as an "other" rather than a video.

Lauren Gage (RI)

Rhode Island specifies an "Other" category for both the amount spent and what those items are, as well. They range from puppets to computer software to microfilm. I agree with Scott that a video game is much more interactive than a DVD, even if the DVD does include some level of interactivity.

Daria Bossman (SD)

I will weigh-in with Scott and choose to keep it simple with the use of our “other” category.

Question about a Branch

March 2, 2011

Question :

Edie Huffman (IN)

I have a library with a (perhaps) branch, which satisfies all requirements. However, they are closed January and February every year. Does this affect their being considered a branch? Thanks for any help.

SDC Comments

Debbie Wilson (DE)

I would think it should not affect the fact that this library is a branch. A branch is a branch no matter what its shape, size or form—but being that Edie asked the question, it now makes me equally curious to find out if there is anything out there that may preclude it from being one. We have branches that although operate year-round, they are small, and have reduced hours every day.

Diana Very (GA)

I agree. Closing for two months out of the year should not affect their status as a branch.

IMLS (Carlos Manjarrez, Associate Deputy Director, Research & Statistics)

Dear SDCs,

We have inserted the current library definition below. It would seem that Edie's question hinges on whether or not the library in question can still be considered to satisfy point number four, having "regularly scheduled hours for being open to the public". IMLS would argue that scheduled closers, even if those closers amount to two months of service, is not inconsistent with the requirement of having regularly scheduled hours for being open.

However, this does raise the question of whether or not a minimum threshold of service, measured by hours of operation, is necessary moving forward. This is something that is written into IMLS' legislation for museum services. Are there established standards in the library field to help determine what a minimum level of service may be?

Our new service hours data elements should help us clearly identify service levels at the outlet level.

SDC Comments

Debbie Wilson (DE)

Carlos, regarding the question you raised about the minimum threshold of service hours—if let's say that we determine those hours to be at least 35 hours per week (averaged over the year).

If then a branch is open only for 30 hours, I think it would not be prudent to all of a sudden not count that library as a branch.

A parallel example would be a branch of a bank. If that branch—due to its size and location—is only open Wednesdays and Saturdays, I would still consider it a branch of the bank, no matter how many days of the week or hours it is open.

Edie Huffman (IN)

Carlos and all:

Thanks. They do meet all the definitions. They certainly will have to meet Indiana minimum levels of service in order to qualify for state and federal funds, including LSTA. This is the URL for our new standards. <http://www.in.gov/legislative/iac/T05900/A00060.PDF?>

Genny Carter (TN)

I agree with other responses - that Edie's branch that closes 2 months is a branch.

As for the open hours threshold - if we set a minimum of even 20 hours a week, several (15-20) of rural libraries would not qualify, especially if they count actual open hours to create a weekly average, subtracting out the closures for weather, staff illness, etc. When the minimum is raised to 30 hours/week, over 50 (of almost 300) of our outlets would be disqualified. I'm not saying that we should not have a minimum, only that many of us are going to have libraries that do not meet a 20 hour/week minimum, and even fewer if that threshold is higher. If we set a minimum, we should have a clear rationale for doing so, and recognize the consequences of saying that these libraries do not meet minimum standards and removing them from our survey. In better financial times, it might spur communities to find funding to keep libraries open for more hours. In the current financial climate, when many of our libraries are cutting back hours, it might have the opposite effect.

We do have minimum standards (<http://tn.gov/tsla/lps/minimum%20standards.pdf>) in Tennessee, but there is little force behind them. They were last updated in 2003, and probably will not be revisited until our budget-necessitated reorganization of our regional library system occurs. Our Maintenance of Effort agreements with libraries within our regional system - which doesn't include 4 metropolitan systems and 10 independent libraries - does have force, because libraries have to maintain funding levels to qualify for regional services.

Daria Bossman (SD)

Just an FYI—In South Dakota 20% of all our public libraries are open LESS than 20 hours per week. (I did the math!)

Scott Dermont (IA)

In Iowa it is only about 11%, but that is still 57 libraries!

Online Book Discussion

“How do you count?”

March 8, 2011

Question

Edie Huffman (IN)

Question to Edie from an IN library director:

A “how-do-you-count” question:

We started an online book discussion last month ... I’m just not sure how to count it. I’m thinking: 1 program; number of attendees are more difficult, because a person may actually follow the discussion, but not comment.

We are tracking the webpage for hits, so that will be counted as well. Thoughts?

Edie:

Dear colleagues: Any thoughts? Surely they have to sign in somehow?

IMLS Response (Carlos Manjarrez)

IMLS would recommend using a comparable participation standard for remote programs as is used for physical programs. For physical programs merely showing up is all that is needed to count an attendee. For example, no verbal exchange from the child is required for a little one to be counted as a children’s story hour participant.

In the case presented below, we would argue that the number of unique web hits is the most comparable statistic to physical program attendees, rather than participation via a comment or post.

Edie, is this number readily available to folks at the Adams Public Library System?

SDC Comments

Edie Huffman (IN):

Carlos and all:

They seem to think the number is available. However, Peter Haxton suggested that the number of unique web hits might be likened to people poking their heads in the door, and that seems a reasonable analogy to me. I imagine they have to sign in with library card or something, so, if that is the case, I would rather go with sign-ins than unique web hits.

Rob Geiszler (VT)

Carlos makes an important point. Probably in your own experience, as well, you rarely “participate” by making any comments or posting. The vast majority of people - and I’m one - are “lurkers,” but they’re definitely attendees.

Bruce Pomerantz (MN)

I just received a request from our largest library to create a new outlet designation for an online branch.

Our online services unit now conducts programs that take place exclusively online, we have staff in our online services department that provide email and chat reference services, and now with downloadable content, we have circulation that takes place entirely outside of a physical unit. We need a place to be able to measure and report that activity.

For 2011, I intend to create the supplemental services outlet category for Minnesota that I submitted as a data element at the 2010 conference. I'm also going to re-submit the concept at the 2011 conference. We're overlooking an important trend if we lump all this activity as if it's a branch activity. I do not think that people from two of three outlets driving to a third outlet where an activity is taking place is analogous to an online meeting. These are new ways of providing services and we shouldn't use a Procrustean model to count them.

Ira Bray (CA)

In California we have a Virtual Visits item on our survey, for FY 2009-10 we had 137 of 181 libraries respond, here's the definition:

Virtual visits to the library (website or catalog). Virtual visits include a user’s request of the library web site or catalog from outside the library building regardless of the number of pages or elements viewed. This statistic is the equivalent of a session for a library's website. Exclude virtual visits from within the library, from robot or spider crawls and from page reloads.

Virtual visits is one of the recommended e-metrics in the ARL publication *Measures for Electronic Resources (E-METRICS)*

see: <http://www.arl.org/stats/initiatives/emetrics/index.shtml> for the report and other resources. Certainly there are challenges to the collection and definition of "session", here is some additional commentary:

The recommendation in the ARL E-Metrics Phase II Report and the default in some Web transaction analysis software define a session based on a 30-minute gap of inactivity between transactions from a particular IP address.⁴ Compiling a composite measure of traditional gate counts and virtual visits introduces a further complication, because virtual visits from IP addresses within the library must be removed from the total count of virtual visits to avoid double counting patrons who enter the physical library and use library computers to access digital resources.

from a report of the Council on Library and Information Resources, pub105 *Usage and Usability Assessment: Library Practices and Concerns* by Denise Troll Covey. January 2002.

see: <http://www.clir.org/pubs/reports/reports.html>

E-book: what should be counted?

March 14, 2011

Question

Nicolle Steffen, CO

I believe we've hit critical mass with e-books here in Colorado and I'm going to need to do some serious cleaning-up of the ebook, downloadables, and circulation data elements. But, before I start having libraries give me revised (corrected) data, I wanted to get confirmation from y'all what the libraries should be collecting. Please see two questions below...

1) E-books and downloadable audio/video titles should only be counted if they are "selected as part of the collection and made accessible through the library's Online Public Access Catalog." Therefore libraries should not be adding OverDrive or other vendor's title into their collection counts, if they are not listed in the OPAC. **Correct?**

2) Similarly—and this is where it gets sticky—only items that are accessible through the catalog should be counted in circulation. Otherwise the collection data and the circulation data are incompatible and cannot be used to calculate turnover rate. **Correct?**

Just to clarify...

Very creatively, libraries are adding the number of downloads from sites like OverDrive into their circulation stats, even though the titles are not listed in their catalogue. <sigh> Their reasoning is "we want circulation 'credit' for these downloads."

SDC Comments

Janet Eklund, NH:

New Hampshire catalogs all its e-books and downloadable titles in our statewide union catalog. Because libraries can attach their holdings records to these titles, we consider these titles to be accessible through the library's OPAC and permit libraries to include these circ stats in their total circulation figures.

Tom Newman, CT

I was hoping someone else would stick their neck out on this issue before me. But if I end up with my head chopped off, so be it. I've been told that might be no real loss anyway.

To answer question 1, I would say, reluctantly, that you are correct. To answer question 2, I would say no. As far as the PLS data element definition goes (and common sense), total circulation includes all library materials, even those that aren't cataloged and searchable on an OPAC. If all counted circulation needed to be accessible by OPAC, then ILL circulation to users would be excluded and they specifically in

the definition are not. If a library still wants an accurate collection turnover figure for its own purposes, then yes they would need to deduct the circulation on items not listed as part of the collection. But for the PLS, it seems to me that Total Circulation is just that, total.

To go back to question 1, however, I think it might be time to jettison the caveat of "selected as part of the collection and made accessible through the library's Online Public Access Catalog." It might have worked for physical collections but it doesn't work for digital.

First, the OPAC seems like such a nineties idea. In the modern world of federated searching where the searching of multiple databases is commonplace and seamless to the user, it just isn't relevant anymore. The OPAC and an Overdrive catalog can be searched together. If a digital item on Overdrive can be found just as easily and at the same time as physical items in an OPAC, what makes one item part of the library collection and one not?

Second, "selected as part of the collection" seems to exclude all titles that become available via cooperative purchasing. In my state, nearly all the e-book and downloadable audio that libraries make available to their users are purchased cooperatively and shared among many libraries. These are "one circ at a time" items, so the sharing is real, but counting them as part of a traditional library collection is not. If 10 libraries share 1000 e-book titles, does each library count all 1000 titles as being part of their collection? No. Do the libraries divide the count between them and claim 100 titles? Not unless those were the hundred the library "selected." Do libraries end up pretending that shared e-books just aren't part of the collection? Well, I guess so, but this seems silly. We need some way of counting them.

Libraries may be transformed in the coming years by more and more digital content. And anyone who is following the latest OverDrive/Harper Collins controversy knows, the digital library world looks to be completely different. We need to record this transformation in our statistics and accept new ways of counting digital content.

Other opinions?

Nicolle Steffen, CO

An SDC sent me this to-the-point comment off-list:

"I would respectfully argue that an online listing of downloadable books is just another OPAC, whether or not it is integrated with the OPAC of print materials. The library has paid for use of these materials, is providing access to them, is providing a finding aid, and it seems reasonable to count them in the circ numbers."

Here's my response:

I agree! I would also argue that if you count these items in circulation they should also be counted in collections. If materials are counted in one place but not the other there is a *mismatch* between collection counts and circulation data, i.e., libraries are only supposed to count titles listed in the OPAC, therefore it would follow that they should only count circulations that are tied to the OPAC. However, the circulation definition is not as explicit as the collection count definitions. (The mismatch means you can't accurately calculate turnover rate.)

So although I don't necessarily agree with the OPAC requirement and understand the legitimate concerns of libraries wanting "credit" for their entire collection and circulations regardless of the OPAC status, I need to abide by the national definitions. I'm trying to insure that Colorado data reported to Census/IMLS is equivalent to the data from the rest of the states. And as you know, it isn't always easy. :-)

In Colorado I think our solution will be to collect more specific collection and circulation data. Then we will be able to pull out the pieces for the national collection, as well as report a wider and more detailed report for virtual materials for CO public libraries.

Thoughts? Is anyone advising their libraries to add download totals (not already included in the OPAC circ reports) into the circ totals? Or is everyone else sick of this topic and we can keep this maelstrom in Colorado? :-)

Genny Carter, TN

This issue is one that I've struggled with practically since I was hired. I know that many of you have heard my thoughts and questions on the topic before, so I thank you for your patience as I dive in once more.

In Tennessee, libraries in our regional library system (all public libraries except 4 Metro library systems and 10 independent libraries) have access to a state-purchased OverDrive collection, which we call R.E.A.D.S. <http://reads.lib.overdrive.com/>. In FY 08-09, it had over 11,000 titles. In FY 09-10, it had over 14,000 titles, and for FY 10-11, the collection had over 17,000 titles. It's an amazing shared resource, beloved by our libraries and ebook-reading, audiobook-listening patrons across the state. Each of the regional libraries (12 support offices around the state) contribute part of their budgets, based on usage/circulation, to help pay for R.E.A.D.S. This money usually comes out of the funding that would purchase books for the libraries. Our regions are funded mostly by the state (close to 90%).

I've been asking (and I haven't been the only one, I know) about how this state-funded ebook & audiobook shared collection should be counted for 3 years. Our OverDrive collections have not been in library OPACs. Patrons access the collection through the website above, for which most libraries have a library-specific link on their own webpages. When I arrived, some of them counted the titles as e-books and audiobooks for the federal data elements. Others put them in a category for "other materials." Because our collection did not meet the "OPAC" part of the definition, and after my questions at an earlier SDC conference, I have been instructing the regions and libraries to count the titles as "other" since our R.E.A.D.S. collection didn't meet the definition. However, three of our four Metro areas now have either an OverDrive or a NetLibrary collection, or both - and to my knowledge, have the titles in their OPAC. Some libraries within the regional system independently purchase additional OverDrive titles also.

I know that some states count OverDrive and NetLibrary collections as a database. We count the individual titles because patrons check out individual titles and we count their circulation.

Then we have the issue of duplication. We have 187 Administrative Entities, and 173 of them are in our regional library system. $173 \times 17,623$ items = over 3 million in duplicated titles. The federal stats don't include our "other" items, so I think that it doesn't artificially inflate our total collection numbers there.

For our state publication, I made two columns last year: Total Collection with R.E.A.D.S & Total Collection without R.E.A.D.S. Many of our libraries are heavily dependent on the state (via the regional libraries) for their materials. 40 libraries had locally-purchased collections of less than 5,000 in FY 08-09. The 14,379 titles in the R.E.A.D.S. collection was almost 3 times their local collections, and it's over 3 times their local collections (with 17,623 titles) for FY 09-10. I've attached the spreadsheet that I created to explain why I added the column to our state report. (Note: it shows 175 AEs in our regional system for FY 08-09. This year, one AE became a branch in the county system and one library left the regional system & became independent.)

Further complications: This past year, we funded the purchase of MARC records from OverDrive, so that the libraries can include the titles in their OPACs *if they choose*. They aren't required to add the titles, but many of them will. So, in addition to the Metropolitan libraries counting their ebook/audiobook collections, we'll have some libraries in our regional system who will have the titles in their OPACS & meet the definition, as we've understood it, and will be able to count the almost 20,000 titles R.E.A.D.S. will have in FY 2010-2011. We'll also have a lot of libraries that will have to keep counting the titles as "other" because many of our libraries - and I'd say most of them the first year - won't add the MARC records to their OPACs. Some of our libraries still don't even have OPACs.

One suggestion that's been offered to make the numbers more realistic was to have the libraries only add their actual circulation from the R.E.A.D.S. collection as part of their collection numbers - reasoning that the library possessed that item for the term of the check-out. However, that runs contrary to the idea that the collection is all of the materials to which the library provides access.... and even if the local library only has 3,000-4,000 physical items in their library, they provide access to thousands more titles via R.E.A.D.S. Libraries are proud to show that they provide this access, but the smaller ones worry that their local funding bodies will see that they have 20,000+ items in the collection - when only 4,000 or so are physical items - and think that the library doesn't need a materials budget increase (or a materials budget at all).

What is the best and most useful way to collect this data? What is the purpose of these numbers? Do there need to be new elements added, and if so, what is the consequence of doing that?

I feel like I'm trying to nail Jello to the wall... and that's without adding the most recent potential ingredient for the Jello: the collection-number-chaos that the Harper Collins 26-check-out expiration might cause in the future . . .

John DeBacher, WI

Thanks, Tom. And thanks also to Genny Carter for so carefully articulating the confusion surrounding the counting of virtual items in a collection (whether in the catalog or not), especially when the library did not "purchase" them. In Wisconsin, that duplication of counting and reckless compounding of materials (however virtual) is exacerbated by the prevalence of shared ILS automation in our regions. To me (and to AI before me) it seems disingenuous, almost to the point of fraudulent, to count the same e-title as "part of the collection" for every library throughout the state, particularly when increased demand for those titles is so great that the chances that a particular title will be available at all the individual libraries during a particular year is impossible.

I would add that I also think it is import to track and collect the use of electronic materials separately from their physical counterparts. Use of electronic materials has very different implications on library staffing, administration, outlet location, and funding than do physical materials. For administrative and space-needs planning alone it would be useful to segregate the use of electronic materials from the physical collection. Otherwise, in a shared automation system, where holds on materials are transparent to the user and frequent van service quickly conveys them to the borrower, I could argue that the "collection" of materials should be the total holdings in the shared ILS system (some of ours include as many as 52 administrative entities). I won't argue that--but it's just as absurd as counting electronic items that the individual admin entity did not select and purchase.

I think this issue has to be more thoroughly probed and carefully resolved for the long run, instead of making short-term decisions based on a fairly defunct library operations model (as Tom said--so nineties!). Whether the steering group can or should carry that out, I'm not sure.

In Wisconsin, while we are using the federal model for collection counts (under protest, since the days of AI!), we are carefully segregating the use of electronic materials from the use of physical materials, partly because of issues related to our funding and reimbursement models. Our 2010 annual report now includes the new data elements I discussed last December and uploaded to the Wiki (here's a shorter link to that page):

<http://bit.ly/gI7RsI>

But those distinctions in use will also help libraries in just a few years, as they wrestle with revising their service plans and consider the location and renovation of outlet, staffing, and hours. I think we should make the collections reflect, as Tom suggested, the selection and purchasing at the individual libraries, not the resources that are, essentially, simply available through fairly instantaneous inter-library loan.

Thanks Nicole, for bringing up the topic. And, as Tom suggested, according to current "rules", the answers are "yes" and "no."

A Library Operates from a Temporary Location

Example: during a major remodeling of existing building

April 11, 2011

Question

Bruce Pomerantz, MN

A library operates from a temporary location during a major remodeling of the existing building.

Only the week or two that that library closed to relocate should be counted as closed weeks, correct?

SDC Comments

Susan Mark, WY

That would be my take on it -- I would concur.

Genny Carter, TN

We have had that situation with a couple of our libraries in the past year, and that is how we dealt with it.

IMLS (in consultation with Census)

IMLS (after discussing with Census) response to Bruce's question (A library operates from a temporary location during a major remodeling of the existing building. Only the week or two that that library closed to relocate should be counted as closed weeks, correct?):

Yes, only the week or two that the library was closed to relocate should be counted as closed weeks. What we want to measure is the availability of service, not whether or not the service is accessible at a given location.

Following is the rationale that was included on the FY2010 ballot (also on the wiki (item #2):

<http://plsc.pbworks.com/f/Ballot+and+Proposed+2010+Data+elements+with+comments.pdf>) :

The number of weeks a library outlet is open combined with the number of service hours per year will provide an excellent community-level measure of public service. Together, these two data elements allow us to more accurately characterize fluctuations in service hours at the outlet level. In cases where outlets had to reduce hours, did they reduce a small number of hours per week, but continue to operate every week of the year, or did the library actually shut down operations for a week or more? Collecting this data element would allow us to answer this and

other related questions in much more comprehensive manner than is currently possible. These two data elements will also allow for better, more detailed comparisons between library outlets and between library systems.

We welcome further comments.

Freegal (music service)

(whether to report as downloadable audio titles (522,000 in 2010 per Library Ideas) or a database as well as whether to include downloads in circulation totals)

April 12, 2011

Question

Lisa Hickle, OH

Many of Ohio's libraries offered Freegal (music service in which patrons can download up to 3 songs per week) in 2010. I've discovered there is no continuity in how they are being reported (in Ohio as well as other states). In an effort to guide our libraries on whether to report as downloadable audio titles (522,000 in 2010 per Library Ideas) or a database as well as whether they should include downloads in their circulation totals, I have done a little research on Freegal, spoke to some of our Directors, and requested advice of a couple SDC's. What I discovered was more educational and interesting facts along with some insightful views. Based on the info I have uncovered thus far, I would lean towards reporting it as a database and not counting the downloads as circulation (which would be un-popular with our libraries) but wanted to bring it here as someone may be privy to information I am overlooking...and in an effort that we all report this in the same manner. Thanks!

SDC Comments

Genny Carter , TN

Nashville Public Library is among those that have a Freegal subscription. As a library cardholder, I can download up to 5 songs a week (it was 20 for a short time when they first introduced the service) - if I do it before the weekly allotment is used up. Here's the explanation:

<http://www.freegalmusic.com/users/ihdlogin>

I'm not sure that Freegal qualifies as a database... maybe?

However, Freegal downloads should not be counted as circulation. Hundreds of NPL's patrons could download Adele's latest hit, and we're never going to return it. There is no *circulation* of these songs. These songs are never catalogued... We do not count article downloads from databases as circulation either. Basically, the library buys access to X number of song downloads and offers them for free (in our case, anyway) to their library cardholders.

John DeBacher gave a detailed response when this issue came up last August which provides a good breakdown. Here is part of that email:

I don't see much that resembles circulation of library materials.

--The library does not own anything—it just buys bundles of downloads.

--The library does not select anything—the patrons have access to the entire Sony catalog.

--The library does not catalog anything—if it did, it would catalog all of Sony's songs (have fun, technical services!).

--The library does not "circulate" anything (if you consider circulation in the "loan" sense of something being used by an individual and then subsequently available to another).

The patron selects a song, the library “buys” it for them, and the patron doesn’t give it back, nor does the use sunset. If another patron wants the same song, the library essentially “buys” it again. I wonder if the library can track use to the individual user. Perhaps so, since patrons are limited to 20 downloads per week. But that would be a critical factor.

John also had links to articles on the subject from Library Journal. His original email was dated 8/31/2010. I know that some people might not have received that email, and he might re-send it for this discussion. I cannot forward it from my email, but I could copy it for anyone interested.

Nicolle Steffen (TN)

In Colorado we also discovered a lack of “continuity” in reporting Freegal and other downloadable materials. I’m working with libraries to get data that is consistent with the PLS definitions, but some library directors are balking at not getting ‘credit’ for the downloadable materials that are not accessed through their OPACs. Many have expressed the feeling that the OPAC stipulation is outdated. Public libraries are on the cusp of major changes to their collections (e.g., e-books) and circulation (e.g., downloadables) and it may be time to reconsider some data elements and their definitions.

Scherelene Schatz (NJ)

I have heard similar remarks from folks in New Jersey. They are spending sizeable amounts of money on the resources and cannot claim statistical data for them. It is making some very upset.

IMLS:

See the previous discussion mentioned above ([2010](#))

[Freegal \(music service\) – how do you count download](#)) and on the wiki at:
[http://plsc.pbworks.com/w/page/39012963/Freegal%20\(music%20service\)%20-%20how%20do%20you%20count%20download](http://plsc.pbworks.com/w/page/39012963/Freegal%20(music%20service)%20-%20how%20do%20you%20count%20download)

Definition of Programs

May 6, 2011

Question

Jay Bank (KY)

I have had one of our librarians ask some questions about whether to count these as programs. They asked:

- When you had an online Summer Reading Program for kids who can't come to the library, did you not count those folks as having attended a program?
- This summer you are having a adult summer reading program in which the patrons work on their own to complete requirements but don't come together. Won't you get to count them? Where?
- "If I have 5 laptops and spend an hour teaching patrons about Virtual Library I can count that as a program? But since I don't have 5 laptops, and I spend 5 hrs. teaching one person at a time, I can't count that as a program? "

I'm not sure how to respond since the definition isn't quite clear on these. Any help is appreciated.

SDC Comments

Michael A. Golrick (LA)

I am not sure about your first two examples, but would be included to count attendance for each and count each of them as one program. However for the third, if you have a group it is a program. If you are teaching individuals (sequentially), I would count each as a reference transaction. [At least it is counted somewhere!]

Diana J. Very (GA)

I agree with Michael on the first two. The third could be a tutoring session or a training session. I can't see someone giving 5 hours of training for a Virtual Library. But, I could see a reference question as a training session, just as Michael indicated.

Overdrive Consortiums

Does anyone have Overdrive Consortiums in their libraries and how do you count the units?

September 8, 2011

Question

Diana Very (GA)

I am dealing with a problem of how to determine the e-books and downloadable audio books provided by Overdrive among several library systems. Each library system contributes money to buy "books" and then all the books are available to patrons in the entire consortium. If a library leaves the consortium, the books that library has purchased will be taken from the collection for everyone. My idea is to determine the total amount of books and the total amount of funds. Calculate the percentage of the amount paid by each library and multiply that by the total amount of books, giving the number of books purchased by each library system in the consortium.

What do you do in your state? And, do you think my idea would work?
Would appreciate a quick response, since the survey is out now.

SDC Comments

Edie Huffman (IN)

I have several consortia which are doing that, so I'm glad to see your suggestion. Sounds ok to me. Of course, you'll want to deal in whole books, no fractions?

Ann Reed (OR)

We have such a consortium. Here's how we deal with it –

Collection counts are what the patron had available to them when they walk into a particular library (say, Salem Public) on June 30. If several libraries pool funds, and have persistent "ownership" of resources, and choose what they get, then each member of the consortium counts them all. Yes, it makes gibberish of a state total, but the purpose of the data is library advocacy and funding, which for the vast majority of libraries happens at the local level.

If a member leaves the consortium, I'd maintain that the count would be what they still have licensed access to.

I say forget state and national totals on this one and be true to the grass roots nature of the data.

Diana Very (GA)

Thanks, Ann. Never thought of that perspective. My eye always follows the money.

Laura Stone (AZ)

The loyal opposition reporting in here.

I am in favor of counting the entire collection for each library. My reasoning is two fold: 1) this is the count that patrons of that library have access to; and 2) trying to get all the libraries in a consortium to divide and report accurately based on a percentage would be next to impossible.

Just saw Ann's comment, and it expresses my concern much better; in terms of money – the budget figures reflect those collection expenses.

Edie Huffman (IN)

Amen, Ann!

Genny Carter (TN)

We have an Overdrive consortia of sorts - the Regional Ebook and Audiobook System (R.E.A.D.S.) provided by the state to the 173 libraries in our regional system (out of 187 total AEs). The local libraries don't pay for it. I've been asking about how to count the items in the Overdrive collection (over 27,000 this year, 17,000+ last year) since 2008, but I don't think we've gotten a handle on this kind of state/consortial purchase of downloadables yet. I remember - and am swayed by - Ann's comments about patron access from my second SDC conference - the first time I asked about this issue. When counted as part of the collection of the 173 libraries with access, the 17,000+ items in READS became more than 3,000,000 items last year. This year, it will add 4.7 million. :/ There is some genuine ambivalence among our librarians and our regional staff about how to count this collection. Some want the additional collection numbers, but some feel that it artificially inflates their collection numbers, so that they have a hard time convincing the powers-that-be that they need any/additional funding for materials.

Thus far, we've been counting them as "Other" materials - for each library in the system, because their patrons have access to the entire collection. We also keep two separate collection totals - one with R.E.A.D.S., one without. The libraries seem to want both numbers. However, we're very aware that those 17,000 (or 27,000 this year) items shouldn't add up to millions in our total collection numbers.

We've talked about dividing the number of titles among the libraries who actually use READS - perhaps based on past READS circulation, perhaps by some other measure like service population. We've talked about counting it as a database (and get major objections on that). [Note: our statewide electronic

library also gets counted multiple times - 55 databases provided by the state. The multiplication of that number is nowhere near as dramatic as the multiplication of the ever-growing READS ebook/audiobook collection.]

In the past, part of our justification for not counting the items as part of libraries' ebook/audiobook collections was that the titles were not in their OPACs/catalogs, but rather accessed through the Overdrive site, so they didn't meet the federal definition. Now, we've purchased the MARC records, and the libraries *can* put them in their OPACS - or not. Only a few have, so far. It's their choice... and it's a nightmare to even contemplate dealing with the same collection in some OPACs, not in others... so we continue to count these as "Other" materials for the libraries. And provide two total collection numbers.

There is also the issue that our R.E.A.D.S. administrator says that she can't provide a breakdown of how many of that 27,000+ are ebooks and how many are audiobooks. I would think that Overdrive could provide that, but since we're not slotting them into the ebook and audiobook categories at the present time, I haven't pressed her.

And now I have libraries asking me about Tumblebooks, etc...

After the Kansas lawsuit against Overdrive about ownership of the content (and ours with Overdrive seems to be more of a lease, I'd say), I do wonder anew - or rather, constantly, since this is the bane of my statistical survey work - about how we count these collections. If we cancel our Overdrive contract, or change vendors, it's highly likely that we'll lose all of those titles.

This year, they'll remain as "Other" materials - with the two separate collection totals at the state end. Whew.

Edie Huffman (IN)

So, I change my answer, It is what is available when you walk into the door of that library, as with books or any physical item. Oh, it gets to be a tangled web!!!

Tom Newman (CT)

I'm all in favor of having this "count the entire collection for each library" idea for shared e-content. It is certainly great for advocacy and a lot easier to compile! The question, however, is whether that is the statistic the national survey is trying to measure or just another number each of our states should keep track of for our libraries. Are state and national statistics important here? If not, why make it a question that we need to report on nationally? If it IS important, then we will all have to agree on some standard way of dealing with shared electronic collections. Diana's suggestion is actually pretty clever, but I doubt we could all do it, especially as the e-content world gets more complicated with libraries owning a mixture of shared, individually-owned, and free collections. I don't have an answer to what to do next, but I do think we have to decide together what data elements 451, 453, 455 are really trying to measure when libraries participate in shared collections.

Diana Very (GA)

Thanks. I'll need to look at this again from another point of view.

Diana Very (GA)

Thanks for the feedback, Tom

Edie Huffman (IN)

We really have to go back to the definitions. <http://plsc.pbworks.com/w/page/30726475/453%20Audio-Downloadable%20Titles>

Look at pages 49-50 of the WebPlus User's Guide.

Diana Very (GA)

Got'cha. Can't these people think about counting them before they invent them? Whew!!

John DeBacher (WI)

Such a tangled web we weave...and get snared in.

With Overdrive's Advantage program, in Wisconsin we could end up with a 3-tiered system. We are expanding a statewide buying pool, coordinated by our regional cooperative systems, who will put up \$700,000 to which the state will match \$300,000 (pending LSTA funding—*insert required IMLS acknowledgement here*). Overdrive is in turn marketing regional Advantage plans to those 17 systems (to buy additional copies of what is already in the state pool) as well as Advantage plans to individual libraries. I don't know what we'll be counting.

The definition includes "Report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC) or through a physical library catalog" (underscore mine). We talked last year about the antiquated absurdity of tying the "collection" to the OPAC, since in nearly all cases the checkout, "shelf status" and circulation is conducted outside of the integrated library system.

In Wisconsin we may start collecting stats on virtual materials similar to what we are doing for databases—we may distinguish those "materials" that the library selects, distinct from what is available

to them through a regional consortium, and distinct from what is available as part of the statewide collection. That way we can calculate the “total” required for the federal collection but also determine how much duplication of materials there is and how many unique “volumes” are purchased by individual libraries. Of course, that model doesn’t work either for “always available” collections or virtual materials that are not “checked out” individually.

The thing I don’t like with the current method (counting the total available to the patron at the library) is that the same limited number of Overdrive “copies” are “available” statewide--and the current demand for e-materials has far outstripped the availability. Also, we now have nearly all public libraries participating in 17 large, regional shared integrated library automation systems, with regional and statewide delivery. Applying the same logic, I should allow the library to count all the materials in their regional cooperative as being available to their patron, since it is immaterial to the borrower, when doing a search, where the item comes from. They search from home, place a hold, and they get an email when it is waiting for them at the library.

To me, a library collection should include what the library selects, obtains, holds, and has available itself for use. Call me old-fashioned.

Bruce Pomerantz (MN)

Counting Consortium Download Collection

I have attached an example of how Minnesota reports on holdings when member libraries have access to downloadable materials licensed by a consortium.

As we SDCs agreed, the member libraries individually report the identical total items available to their users through the consortium. (For accuracy, I ask the consortium for the number and preload the data element. I learned the hard way that consortiums informing their members what to enter did not guarantee that everyone entered the identical number.) The member libraries also report what they have separately licensed. Table 1 in the Word file provides this information for one consortium.

Table 2 in the Word file provides a summary of what each consortium has licensed for its members and the total materials licensed by their members separately.

The individual library report (the PDF file) indicates what is available to their users regardless of what agency licensed the material. The individual library report separates the materials collection into state-licensed, consortium-licensed, and library-licensed (page 5) and the expenditure section indicates the amount it spent for what it licensed. (Page 11) .

I hope this informs the public how it is possible for their library to have a large number of downloadable materials at a very modest expense.

Inter-library loan question

September 12, 2011

Question

Stephanie Taylor (AL)

I have a question about elements 552 and 553, the Inter-Library Loan questions. In Alabama, some of our libraries are in systems. The libraries within a system are called member libraries. Each member library has its own director and board, but they receive their state aid from the system headquarters. There has been conflict on how they report inter-library loans. Should they report loans between other member libraries in the system as well as loans between libraries outside of the system? I know branch loans should not be counted, but what about these member to member loans?

Thanks!

SDC Comments

Bruce Pomerantz (MN)

Count the member to member interlibrary loans within the systems.

The source of the funds is immaterial. The libraries are separate in governance and therefore are separate administrative entities. Otherwise, all the data, not just ILL, would be reported as one administrative system

Ann Reed (OR)

We have federations and cooperatives. The libraries all have their own directors and boards, and are legally established as city libraries. So they count loans among themselves as ILL, even if its patron initiated.

Due to a past history of net lender reimbursement, at the state level we break ILL incoming and outgoing into two parts – ILL within the library’s shared automated system, and ILL to libraries outside the library’s shared automated system. I won’t bore people with the details on why we did it that way.

Items/capita and downloadables

October 17, 2011

Question

Bruce Pomerantz (MN)

Here, to me, is a conundrum.

The public library survey publication in the back provides various per capita or per 1000 or per 5,000 measurements with state data and rankings.

Print materials per capita does not change with the advent of e-books.

However, audio materials and video materials per 1,000 population are listed. These calculations were predicated on the assumption of physical materials and that most materials were available to everyone either through ILL or, rarely, only on-site.

Now we have Overdrive and its competitors. If the state licenses Overdrive, then I would say it's clear cut to include the number of titles licensed in the state calculation. But, what do we include and exclude if a consortium licenses the materials and the materials are available only to the consortium's library members card holders? To create an oversimplified example: I have two consortiums within the state of a population of 2, each consortium having one of the people. If Consortium A licenses 1 audio from Overdrive and this one item is the entire audio collection, do I have .5 titles/capita or do I ignore the licensed item and have 0 items/capita? Or, do we now have to abandon per capita measurements because only physical items can be counted and that would be misleading?

SDC Comments

Kathy Sheppard (SC)

I have been dealing with umpteen variations of this question among the librarians in my own state, over and over (and over) again. Everyone has a different point of view! It is impossible to get consensus without an in-depth discussion and some understanding of the long term implications. Doesn't this need to get into the "Data Element Life Cycle" -- unless it is too late for this year?

Edie Huffman (IN)

I agree; it is something we do need to talk about, IMHO.

Michael Golrick (LA)

I expect that our friends at IMLS now have this issue on their list.

July 19, 2016

I have another question about the implementation of the new data element on # of hours open. What is the data being asked? I had collected hours per week (per outlet) and number of weeks. I submitted that originally, but got an edit check that made me think that they were looking for total # of hours per year.

Any further discussion on any of these topics for me will now be “ABF – After Book Festival” (see my extended signature file below). You are all more than welcome to come to our outstanding Book Festival next weekend (no LSU game), and if you want to volunteer, trust me, I can find a place for you!

Circulation of Downloadable Items

October 18, 2011

Question:

Juan Tomás Lee (UT)

HELP!

My thinking on this was clear for about 28 seconds, now I am not sure...

If a library **DOES NOT** report any items for Audio - downloadable titles or Video - downloadable titles (because these are not accessible through the library's OPAC), do they report the circulation of these items under Total Circulation (definition says all materials, all types for use outside the library)?????

I appreciate your feedback.

SDC Comments

Scott Dermont (IA)

Yes? My understanding was that libraries could count circulation for items that were not in their catalog. I assumed that applies to downloadable items as well. I sure hope it does, since I've been counting things that way for 3 years.

Edie Huffman (IN)

That's my understanding, too. Circulation and holdings are two very different data elements.

Genny Carter (TN)

We also count the circulation for those downloadables in Tennessee.

Juan Tomás Lee (UT)

I guess I was thinking about the calculation of "turnover rates" later on... Is that a consideration?

Ann Reed (OR)

We mavericks in Oregon count them in collection since libraries paid for durable license, even if they aren't in the catalog, as long as the patron can search for them somewhere,.

Edie Huffman (IN)

I don't do turnover rates anymore; too problematic.

John DeBacher (WI)

I know there is a certain amount of impetus among the ranks of our state librarians (and considerably more among librarians) to "count everything" to justify our libraries, but I do not think we should be mixing apples and oranges and counting as "circulation" new types of uses that are, quite literally, immaterial. I think the uses should be tallied separately.

I suggested last year that we should consider making distinctions between use of digital resources and circulation of physical materials. Perhaps this is something that could be taken up by the committee and puzzled over by the academics who will use the results. I was reminded of this when we (Wisconsin) updated our library space planning manual—that the purchase, preparation, housing, distribution, and use of virtual library materials has a very different impact on library overhead, staffing, space planning, budgeting, and maintenance of materials. Using our data for comparison of libraries will only become flakier if we continue to take the path-of-least-resistance and lump the virtual with the physical. I think we have a responsibility to gather data that is useful for evaluating library services through time and can reflect the changing landscape.

So, in Wisconsin, we have for two years now gathered stats on the use of digital "immaterial" on the annual report, but those are distinct from what we count as "circulation." Circulation implies a visit to the library, and the involvement of the building, its overhead, staff, parking, overflowing toilets, the whole works.

Daria Bossman (SD)

I have to agree with John. These "apples and oranges" combinations make me nervous. They will serve no one in the end. Daria Bossman, South Dakota, SDSL

Bruce Pomerantz (MN)

Coincidentally, I have been checking with the various the ILS people of the various consortiums to determine if they all can distinguish between physical and electronic material circulation. If it's feasible, I

intend to do it to track the transition from the print to electronic materials. I predict physical materials will gradually shrink in number. I want the libraries to be able to explain to their funders why this is occurring.

I also predict that space planning will take this transition into account. Libraries 10 years from now will probably shrink the amount of floor space needed for shelving. Most of the floor space will be for computers and programming.

Ann Reed (OR)

I'd take an alternate view, and would argue that we are talking apples and apples here. The way the digital items (audio, video, e-book) are licensed should drive whether its counted with circ. For Oregon, if a patron checks out an e-book, its theirs, and only theirs, for three weeks before it returns to the "shelf". How is this any different from a physical object? I would NOT count use of Gale virtual reference books as circ, or any other item that is available to unlimited users at the same time.

True, calculating the amount of overhead to have such an item available is a totally different ball of wax than a physical book, but that's not what this national data set was meant to do. There is no reason why a state can't collect subsets if it needs to for building planning or what have you at the state level.

I look at circulation as a measure of use of purchased library resources by the community. Library visits and other elements help capture foot traffic to the brick and mortar.

Scott Dermont (IA)

To me the problem is that libraries can't count the downloadables if they aren't cataloged even though patrons can access them from the web site. But they could still count circulation either way. So they are counting circ for items that aren't in the catalog – I do think this makes determining turnover for the entire collection very problematic. I agree that if the downloadables are in the catalog and are counted for circ, then turnover isn't an issue. But this is a rather rare occurrence in Iowa so far since usually only larger libraries download or generate Marc records for all of the downloadable materials.

Bruce Pomerantz (MN)

I agree with Ann about apples to apples AND to not counting online Gale Reference use as circulation. Recall that we did away with the online Reference/Serials category as a distinct data element and defined these analogs to print materials as databases. We did so because we could not create a definition that distinguished them from databases.

As for counting database use. . . I'll leave that Pandora's Box up on the top shelf way in the back next to a bunch of unopened cans of worms.

Edie Huffman (IN)

It really sounds as if we need to think about counting physical and digital circulations separately.

Bruce Pomerantz (MN)

I am surveying the ILS staffs with the intention of separating physical and digital circulations for 2012 for Minnesota use. I will combine them for IMLS if that is what is required.

My concern is calculating total materials available and calculations that use that total, such as items per capita. Counting only physical materials for the calculation leads to an undercount. We cannot have a category "unavailable to count." Policymakers who look at the total materials expenditures and look at the number of total physical materials will not understand that a substantial number of items are "unavailable to count." They will want to know what the money is being used for. Consortium licensing adds to the confusion.

Scott Dermont (IA)

I agree. I currently have a separate count for electronic circulation, but I haven't broken it out by format yet. Just a single number that covers eBooks and downloadable audio/video

Nicolle Steffen (CO)

A request and comment from cold and snowy Denver...

If you have a separate count for electronic circulation, could you share your questions/matrix? In Colorado we want to breakout the e-materials, but are struggling with the level of detail needed. BTW, there was a similar discussion on the list back in 2009. The problem of turnover rate was raised at that time, too. See: <http://plsc.pbworks.com/w/page/7422622/How%20the%20Use%20of%20Audio%20and%20Video%20Downloadables%20are%20Counted>. Seems we still haven't solved this problem.

John DeBacher (WI)

Here are the questions we used in Wisconsin on the 2010 collection. These are in a section of Library Services titled "Use of Digital Resources." Many libraries were still not yet able to identify and report the use, but I expect that this year all the regional cooperatives will be able to authenticate the use to the individual libraries. There is still some concern about attributing non-resident use in a non-arbitrary fashion in situations where the library cards are issued by a regional shared integrated library system, not necessarily by an individual library (the regions try to avoid having multiple cards issued to patrons

who may use several libraries). Since most of the use is “remote,” and the Overdrive collections are part of a regional and statewide effort, it’s tough (and may get controversial) to attribute some of those uses. Next year, a million bucks will get pumped into the Overdrive and other statewide digital collections, with more at the regional level, so libraries may be clamoring to get credit for those non-resident “uses.”

7c. Uses of E-Books By Users of Your Library Report the number of annual e-book uses by users of your library. E-books typically correspond to printed works, although cataloged as distinct resources and are made available for use when downloaded to users on portable devices (e-book readers) or personal computers for a limited time. Report only if you can document the uses or if your system has authenticated the use (field may be pre-filled if your system has supplied data to DPI). (EBOOK_USES)

7d. Uses of E-Audio by Users of Your Library Report the number of annual electronic audio (e-audio) uses by users of your library. E-audios correspond to commercial works, although cataloged as distinct resources and are made available for use when downloaded to portable audio devices or personal computers for a limited time. Include sound recordings such as web-based or downloadable audio books and MP3 files such as OverDrive titles made available by your system, if the system can authenticate the use by your library’s patrons. (EAUDIO_USES)

7e. Uses of E-Video by Users of Your Library Report the number of annual electronic video (e-video) uses by users of your library. E-videos typically correspond to commercial works, although cataloged as distinct resources and are made available for use when downloaded to users on portable devices or personal computers for a limited time. This would include OverDrive titles made available by your system if the system can authenticate the use by your library’s patrons. (EVIDEO_USES)

Online Database Count

November 2, 2011

Question

Bruce Pomerantz (MN)

A library licenses the online language learner product [Power Speak](#).

Does this count as a database?

Do we need to create an online self-instruction category?

[Stop the World, I want to get Off!!!](#)

SDC Comments

Ann Reed (OR)

LOL. A database is pieces of information retrieved with a common interface. The individual pieces cannot stand along. Yes, Power Speak is a database.

Bruce Pomerantz (MN)

The note included with the database definition states, "The data or records are usually collected with a particular intent and relate to a defined topic."

I don't consider Overdrive as having a particular intent or narrowed in its scope to a defined topic. However, we have the weasel word "usually" in the definition. Are you counting Overdrive as a database if a library subscribes?

Video Game Software in Collection

November 9, 2011

Question

Bruce Pomerantz (MN)

Is anyone counting video game software in their collections section? If so, how are you categorizing it?

What hath *Oregon Trail* (invented in Minnesota) wrought?

SDC Comments

Ann Reed (OR)

By and large, Oregon libraries count either as databases or as "other materials"

Edie Huffman (IN)

Same for Indiana.

John DeBacher (WI)

Bruce (and others),

Assuming you mean physical items that are checked out (such as an "edutainment" CD-ROM set like Reader Rabbit, or a Playstation game), they are counted in "other materials" in Wisconsin

We only have libraries report "databases" if they are mounted (on a server or optical drive), or available online for patrons to search. I have (and AI before me) interpreted "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" to mean that items are only counted as database if they are stored and delivered electronically (not circulated on a physical disc).

We only add new elements to the state collection if libraries clamor to report them (which is rare!). We try to be sensitive to the fact that if we include a new element, then libraries think they have to offer it.

Ann Reed (OR)

I like your approach, John, but the problem I have is that a CD ROM is an electronic media.... Unlike microfiche, books etc, that can be physically examined, DVD, CD ROM etc. have to have a machine to decode recorded electronic information. How is the disc you insert into the CD drive different that the hard disc the computer reads for other items.

Which puts me on the fence between "other materials" and "databases"

Scott Dermont (IA)

I think we are stretching the definition of a database way out of shape if we want to call "Rock Band" a database. I think we are getting hung up on the wording of a definition rather than looking at why something is being counted. A library and the public use a database in a much different fashion than they would use a computer/console game.

Ann Reed (OR)

I think we need to revisit the definition and be more specific on our rationale to exclude "Oregon Trail" etc. When I use something like "Oregon Trail" I can envision the code, and to my mind, it is a database in a pure sense. It would be helpful to change that definition a bit. For instance, when we talk about "database" in our office, we are usually talking about a database of magazine or other articles available via subscription over the internet. If that's what we have in mind, lets say so. If a library develops an Access database of graveyard records, does that count? Yeah, it is all a can of worms, squirmy ones. Lol, and don't even get me started on "databases subscribed to via cooperative."

John DeBacher (WI)

I see what you're saying, but that line of thinking could slide into DVDs (video) CDs (audio) and ebooks (whatever the heck they are). Maybe it's a sore that needs scratching (though my mom always said, "don't pick it or it'll never heal!"). I think of it as what someone checks out and takes from the library versus database that they access electronically either within or outside the library (though I hope my libraries don't report the Wii games they use for programs as databases!).

I'm game to simplify vote to lump collection under one category--"stuff" and all services under "uses." Then we can all just go hang out in that Kansas City district where the hotel is located.

Ann Reed (OR)

Lol! I hear ya!

Denise Davis had come up with a set of “boxes” that seemed to work pretty well, and was a guiding principle as we worked on collection counts a while back -- there are things you read, things your listen to, and things your watch, and then there are databases that have little bits of various kinds of things retrieved by common interface.

Lets go with the “stuff” and “services.” I hear KC actually has good sushi.

Counting Overdrive, etc.

November 10, 2011

Question

Michael Golrick (LA)

I just finished a conversation with a staff member at a library. She is (as am I) interested in the issue of how we count Overdrive.

I told her that for now, we are counting it as a database, and its uses as database uses. Part of my justification for this is the part of the instructions under 451 (as well as 453 and 455) about inclusion in the library's catalog. I would note, however, that 453 and 455 have language which is slightly different than 451 in that they refer to "or through a physical library catalog."

Now, here are some of the questions and issues I have. What if the library maintains a separate catalog for all of its electronic media (e-books, audio downloads, video downloads)? Does this count as an OPAC and mean that Overdrive titles can now be counted as e-books in 451?

One point she made, that had not occurred to me, was that they select individual titles ***and*** that because they can be used by one user at a time, sometimes multiple copies. (They seem more and more like books to me when this language is used.)

If that is true (we count these titles in the 450 series), we should then be counting their uses as circulation (item 550) not database uses (hmmmm, this is not even reported nationally, although we collect it for the state).

So I guess my issues are these:

1. We need to make the language consistent among the 450 series data items
2. What constitutes "a physical library catalog" (if we keep that language)
3. Is their use circulation? [If it is, I skews turnover rates (thanks, Bruce), but if the titles are part of the collection, there is not really a skew, I think.]
4. Or maybe better yet: what are we trying to capture?

I, like many of you, have a holiday tomorrow. I thought I'd cap off the week with this. Perhaps the discussion can continue in Kansas City (fresh on my mind with reservation info being received today). In any case, enjoy the weekend, short or long.

SDC Comments

Scott Dermont (IA)

We count overdrive as individual titles because the consortia has control over collection development. We also track circulation for this, and I'm subtotaling so that it shows differently from circulation of

physical items. Seems really messy to me, especially since it seems like we aren't counting this consistently at the federal level.

Lauren Miklovic (RI)

Rhode Island does the same thing as Scott's libraries. I have no objection to counting Overdrive either way, but it does seem like it would benefit us to be consistent.

Library Web Page - Yes or No?

November 14, 2011

Question

Patience Frederiksen (AK)

I have had Moose Pass Public Library put down their library's Facebook page as their web page.

<http://www.facebook.com/pages/Moose-Pass-Public-Library/240440615980373>

They do have a new blog at <http://moosepasslibrary.webs.com/>

I do not find a 'classic' web page for their library.

I checked the definition of a web page. All that the wiki says is it starts with http://

Opinions? Do blogs and Facebook pages count as web pages?

SDC Comments

Edie Huffman (IN)

I'd say if it has an http address, it probably has to be accepted. That definition may need to be beefed up. (I can't even access Facebook from work unless I can prove that the need is work-related. Jumping through hoops has never been one of my strong points!)

However, I would suggest that it should also have some basic information (name, address, way to contact someone, catalog, list of services). This is what our new standards require:

590 IAC 6-1-4 k(5) A website that must include the following:

- (A) Hours of operation, physical address or addresses, a map for each fixed service location, phone number, and e-mail address.
- (B) Electronic resources provided free of charge to the citizens of Indiana by the state of Indiana, for example, INSPIRE.
- (C) Public service policies including, but not limited to, circulation policies, fees, and Internet use, adopted by the library board.
- (D) The library's online public access catalog.
- (E) A calendar of events and programs, which shall be updated at least monthly.

I'll be interested to see what others have to say. --Edie

Peter Haxton (KS)

I agree with Edie. We have several libraries with Facebook pages as their only web presence.

The element definition is actually called "web address" which to me means any place on the web, be it a "traditional" webpage, Facebook, MySpace, WordPress blog, etc.

Rob Geiszler (VT)

I like the idea of opening this up to blogs, Facebook, etc. (Not so sure about Twitter) The point, it seems to me, is to determine if they have a presence in cyberspace. We know that that environment has changed dramatically.

Ann Reed (OR)

Good question. I looked at the facebook page. It didn't list hours, or regular programs, location, or offer catalog access, or a lot of things a library web page would, so id be inclined to say no, this isn't a substitute.

Juan Tomás Lee (UT)

Actually, the hours, location, phone, is listed in the INFO link to the left. I would argue that a FB page constitutes web presence. Now, about content and what constitutes a "robust" or what "should" be included is another matter. I do agree, links to the OPAC, online resources provided by library districts, State Library or consortia, etc. should be included.

Susan Mark (WY)

My vote is if they have a web presence, be it traditional website, Facebook or wiki, we count it. All I care about is whether someone can find the library online.

As for what should be included -- I've seen some pretty anemic traditional websites out there, and we count those. I do not want to get into evaluating if libraries put up enough info to count.

Daria Bossman (SD)

I agree with Susan!

Bob Keith (NJ)

I'm kind of new here but I have a bit of a different opinion. Facebook is a closed system, you need a login and password to access it and to get a login and password you need to provide personal information. Should we be encouraging libraries (which are usually about open, anonymous access for all) to create their Internet presence in such a closed system? We wouldn't allow a library building to be in a gated community but having a library's website on a password protected system is doing just that.

Susan Mark (WY)

Actually, no it's not closed -- at least not for the same purposes as a traditional web page serves. You can view pages easily -- you only have to sign in/sign up if you want to post to the wall or comment on other posts. For just putting up information, anyone can access it.

Juan Tomás Lee (UT)

I agree with Susan & Daria.

Juan Tomás Lee (UT)

Actually, the FB pages for institutions (causes, etc.) are public. Anyone can see them; just needs to "register" if you want to post to it.

Susan Mark (WY)

Actually, no it's not closed -- at least not for the same purposes as a traditional web page serves. You can view pages easily -- you only have to sign in/sign up if you want to post to the wall or comment on other posts. For just putting up information, anyone can access it.

Lauren Miklovic (RI)

I agree with Susan as well. Sometimes I shudder to think of some of the "traditional" library web sites out there!

Scott Dermont (IA)

Forcing you to sign up to participate. I don't like that at all. Library customers should be able to participate without signing up with FB.

Edie Huffman (IN)

I do agree with Scott. I think we need to adjust the definition.

Susan Mark (WY)

As opposed to not being able to participate at all, as you have with a traditional web page?
If it's a question of being able to contact or provide feedback to the library, the library can put email, phone, address, etc. on their info page.

Scott Dermont (IA)

It's not the signing up part that bothers me. It is the signing up with Facebook. I have no problems with libraries using Facebook as part of their online presence. But to make it their only online presence limits the amount of customers who can participate.

Edie Huffman (IN)

Here's my proposed definition change:

I suggest the definition should be adjusted, so that a login not be required to access the library's web page as in Facebook. Many older and blind or visually impaired people have trouble using Facebook, so if that is the library's sole presence, it is not as user-friendly or accessible as a traditional web site. "

I know that my husband, who is blind, has not been able to independently set up or access a Facebook account, and he is fairly computer savvy. Food for thought!

Susan Mark (WY)

You do not have to log in to view a page on Facebook. I've logged out and checked. I can't find anything in the page settings that would allow you to restrict viewing to only those who are registered with Facebook. You can do that with a personal page, but I'm not finding anything that would allow you to do it with an organizational website.

You can also set it up so that no one can post to your site -- if you want it to function more like a traditional website, you can. If you're concerned that you have 2 classes of users -- one who can comment and one who cannot -- you can just set it up to publish info but not allow comments from others.

My contention is that a Facebook page offers no less than a traditional web page does.

Edie Huffman (IN)

I'll have to check it out at home; I'm not allowed to access Facebook at work, even though one of our divisions has a Facebook page!

Stacey Malek (TX)

So, Edie, you can't go out just look at a library's Facebook page, like Susan is talking about, at work? I can, so I'm curious. I know a lot of companies/institutions have those kinds of policies, or block Facebook altogether. Would that limit who could view the page, even without signing on?

Frank Nelson (ID)

This goes near the heart of my concerns here. I don't know of many k-12 school districts that don't block Facebook. The number of public libraries that block social network sites is unknown but is probably a larger number than we might want to know about. The distinctions between Blogspot and say Facebook vs Drupal, Wordpress, or Plinket etc get pretty fuzzy. Personally, I have no problem with a library webpage being built on any available content management platform as long as it is universally available. I still try to check webpages listed every year, as I believe our Census friends do as well, to see if they are actually there and not 404. I really don't want to set the bar too high, but there does have to be some kind of minimum qualification and that means there has to be something more than a phone number and an address. That's what phone books are for.

BTW, the comments on the wiki for the Review sessions planned for KC continue to trickle in. <http://plsc.pbworks.com/w/page/47699956/PLS%20FY2012%20Review> Technically the Review wiki comment period closes on Nov 22, but I for one will be monitoring the site for additional comments all the way through the conference. Since **163 Webpage** is not assigned to any Mentor Group at the moment, Edie has correctly added a comment to the specific element page itself, <http://plsc.pbworks.com/w/page/7422519/163%20Web%20Address>

So do take time to add your comments, first to the sections assigned to your respective Mentor Group, then to any and all other elements that you feel need to be changed or (gasp) deleted. Oh, of course you will have to login to participate. :) See you all on the Net and in KC in a couple of weeks.

Edie Huffman (IN)

Stacey:

Well, when I clicked on Facebook on a library's webpage, I get an "Access denied" message. When I click on www.facebook.com, I get the message "Internet Explorer cannot display the webpage". It's just too much effort to ask our IOT department for access!

Edie Huffman (IN)

Frank:

Thanks for your words of wisdom and clarification! Yes, group definitions have their problems but when you get a lot of intelligent, motivated, engaged people to put their minds to situations, one gets a lot of good thought and interaction! See you all in KC (I just got the ok; the paperwork had sat on someone's desk for one month. Once I started asking about it, it appeared!) "All's well that ends well"!

Michael Golrick (LA)

Here is the note I posted on the wiki (in case you are not registered to get the updates):

You have conflated two issues. First is the issue of whether or not Facebook only constitutes a web presence, which is a discussion on our list at the moment. The other issue is whether or not the web presence meets accessibility requirements. Now, I believe (but do not know for sure) that Facebook does meet at least some of the requirements since I have at least one Facebook "friend" who is blind. In fact, I would argue that we should include the accessibility issue in the definition, but not mention any particular web-based service.

I really do think it is two issues, and we should talk about them separately.

Edie Huffman (IN)

Michael:

Yes, you are right. Since we don't ask about accessibility for anything else, (programs, materials, etc.), probably we should not even discuss it here. But, it does related to my point about Facebook not being a good only web presence.

Happy Friday to all; see you in KC.

Bruce Pomerantz (MN)

1. I googled Moose Pass Public Library. I did not see Facebook as possible choice.
2. When I go to the Facebook home page, all I see is the need to register or logging in. I do not see a search option to locate an organization.
3. I did obtain the Moose Pass Public Library by clicking on the URL that was provided by Patience.

So, if you don't have an organization's Facebook URL and a link to the URL is not available on any other site, the only way to obtain access the Moose Lake Public Library website is to register on Facebook. Once you obtain the URL, you can delete your Facebook page. I do not call that accessible.

P.S.—I skipped to “page 6” in the Moose Pass Google listings to see if Facebook got relegated down. On page 6 was [NCES's search for library results](#) information on Moose Lake Public Library for the year 2005.

Susan Mark (WY)

That's odd -- I googled a couple of ours, and the Facebook link came up on the 1st page of hits.

Rob Geiszler (VT)

I don't use Google anymore, since they started giving Fox News that preferential real estate on the news page, so I can't speak to what a Google search will generate. Instead, I've been using duckduckgo. Putting in Moose Pass Public Library brought up their Facebook page as the second hit. Clicking on it brought me to the Moose Pass PL page, immediately, just as if it were a regular web site. No account or log in necessary. Sure looked like a web page to me.

Bruce Pomerantz (MN)

I tried the same query and this time the Facebook entry was number 6 on the first page.

I tried Moose Pass Public Library on Bing. The first time, again nothing. The second time, it was number two in the list.

I'm uncertain now how I feel. I don't think I would have tried a second time if Susan hadn't said she was successful.

Kathy Sheppard (SC)

I concur – have been able to find Moose Pass PL in Facebook through Google and through the Facebook page search (tiny print at bottom of Facebook page.) So there is no requirement for anyone to register with Facebook in order to find this page; but, like just about any web search, it takes a certain willingness to persist in the search.

If this is what the library can afford (as opposed to paying someone to build and maintain a site) and it is easier than maintaining a blog (which can also carry hosting fees), then Facebook is a good option for a library of small means. Some of our libraries have gotten their web pages built for free or at reduced rates by various well-meaning helper-outers, who then abandon the project leaving the library with outdated information – they would have been better off with a Facebook page, which at least is consistently formatted and easy enough to find, modify, post pictures on, etc.

Plus, doesn't the entire world use Facebook at this point? What better exposure can you find?

I think "web presence" is what we are looking for and not necessarily "web page."

Michael Golrick (LA)

This conversation reminds me of some work that Walt Crawford is doing. His blog is here:
<http://walt.lishost.org/>

Back in August he noted:

I reached a milestone yesterday, completing Phase 1 of my 2012 book project—that is, checking public libraries/library agencies in half of the U.S. states for presence on Twitter or Facebook. More than 2,500 libraries checked in all, starting near the end of July. (There will be a followup, intended to be precisely three months after the initial scans.)

Here is more info from a post in late October:

I'm currently interleaving work on the draft text for *Libraries in Social Networks* (working title, from ALA Editions, some time next year with luck) with work on expanding my survey of actual public library presence on Facebook or Twitter from the current 25 states and 2,406 libraries to a total of 38 states and 5,957 libraries (or, if energy runs out, 36 states and 4,963 libraries).

I'm doing the remaining 13 states (all of them I hadn't already done and that have readily-available spreadsheets of library names and population served) in alphabetic order—except that, regarding the parenthetical note in the previous paragraph, I've now moved Pennsylvania and Texas to the end, since those are the two with the largest number of reporting libraries.

So, I guess that has me thinking about what the question really is. Is the question: Does the library have a web site? Or is the question: Does the library have a presence on the web? [Of course, both of those don't answer the question: why are we asking, and why do we care?]

There certainly is not much language of explanation for data element 163, and I wonder if some of the folks who have been at this for a while remember the goal in asking the question. It certainly seems like some further discussion is needed.

Edie Huffman (IN)

Michael and others:

I think we are asking, to make sure that they do (all sorts of interest in that) and to get an address, in one easy location? I agree, we need further discussion and a more detailed definition.

Patience Frederiksen (AK)

It seems to me that when we discussed adding web addresses as a data element, we were doing it simply as directory-type info for each library. Does the library have a fax? Does the library have a web page? This is why the data definition is so short, if I recall correctly. The web page was just another way to get info about the library out to the public.

FaceTweets did not exist when we added web page address to the data elements. So, now the question could be changed to one of web presence, which would allow for web pages, blogs, facebook, twitter, and any other social networking application that comes down the pike.

Ann Reed (OR)

Lol, what Edie said. I recall the time the debate was library service beyond the walls vs. the brick and mortar, and getting an idea of who was getting out on the Net.

Indirect costs (Question About)

November 17, 2011

Question

Laura Stone (AZ)

One of our county librarians is asking me where to put the indirect costs that the county is now taking from the library district budget. The county has now begun to sweep library district funds – based on a formula for indirect costs. How do I represent this little shell game of a cut?

SDC Comments

Michael Golrick (LA)

We ask for much detail in our question about “Other Expenditures” (Data Element 357). We include:

13.15 Contractual maintenance services – Expenditures for custodial, janitorial, security, and other services procured independently by contract or agreement with persons, firms, corporations, or other governmental units.

...

13.22 Bookkeeping, accounting, & auditing – Expenditures for charges by parish or municipal governments for such services.

13.23 Grants – Expenditures for contributions made to another governmental unit. Include payments to Bayouland, Green Gold, Trail Blazer, and Libraries Southwest.

13.24 Tax election – Expenditures for costs of tax election paid from library’s budget.

13.25 All other operating expenditures – All other expenditures not specified in any of the preceding expenditures categories. Include expenditures for the following: membership dues, messenger and delivery service, advertising, printing, duplication, binding, postage, building rentals, maintenance of property and equipment, minor repairs, materials and supplies (stationery, forms, paper including computer paper, ribbons, disks, library processing materials), motor vehicle supplies (oil, antifreeze, etc.), small tools (rakes, shovels, weed eaters, hand tools, etc.), debt service, etc.

So depending on what the overhead was for, it would be included in one of those categories which is rolled up into the nationally reported figure.

Hope this helps.

Ann Reed (OR)

Our state just collects federal elements, so I advise libraries to put it under “other operating expenditures” as it is as much of overhead as are office supplies, utilities, cataloging fees, etc.

2012

Reference questions-what is, what isn't

January 9, 2012

Question

Nicolle Steffen (CO)

Please excuse the long-winded question below, but I really need input from y'all on this complicated and controversial point about reference questions.

I've got one library director that counts all technology questions as reference questions. Here's some of what she says...

Ever since the World Wide Web push in the early 90's, everyone I know has been including the very questions you label as "technology" questions as reference questions. In fact this was a matter of staff training in libraries where I worked and in others that I was aware of. I can name a number of places that always counted these helps as reference, and I am guessing that they still do so.

Staff also required specific training in order to be able to answer all the software, and hardware, questions that began and have continued to grow ever since. Hence, hours and hours of specialized training on every aspect of patron help with technology.

As far as I was taught, if staff are asked a question and must train a patron to use some technology or software in order to answer their question, then it was every bit as much a reference question as was any other where they might train them to use a print index, train them to use a database, or whatever. If someone needs to learn how to set up an e-mail account, for example, and staff do a mini-training on that process, they must have the knowledge to do so or they must use other print or online resources to tell them the steps, and that is a reference transaction....or has been in every place I know of.

She goes on to say that pretty much any question that a staff member answers that is not directional is counted as a reference question.

It was my understanding that technology help, like setting up an email account for a customer doesn't count as a reference transaction. Years ago the explanation I got was that a reference transaction must involve all of the following: 1) information contact, 2) knowledge, use, recommendations, interpretation, or instruction, and 3) one or more information source. For me the "information source" often sorts the technology help questions from the reference transactions. So, for example, helping a patron open a Word document isn't a reference question, but helping them find an answer in a database is a reference question.

Several colleagues working in public libraries have given me the proverbial slap upside the head and told me that on the ground all sorts of things are being counted as reference. Okay, I get it, but I also feel obligated to at least accurately represent and promote the national definition.

Before I contact this library director, I'd like to get feedback from y'all.

One of our county librarians is asking me where to put the indirect costs that the county is now taking from the library district budget. The county has now begun to sweep library district funds – based on a formula for indirect costs. How do I represent this little shell game of a cut?

SDC Comments

Susan Mark (WY)

Mixed feelings on this one, but would you count it as reference if you showed a patron how to use a print encyclopedia? One way of looking at it is that just as the encyclopedia is a container for info, so is the computer.

Printer problems... not so much. I wouldn't consider that a reference question.

That said, I'd be perfectly happy to see collection of reference stats go bye-bye. I know many of my numbers have little or nothing to do with which libraries do a lot of reference and which don't. More to do with which libraries track them more diligently.... OR collect non-reference as reference.

Michael Golrick (LA)

As you can see from my title below, I get to deal with this every single day! (Although my stats count for the "other" survey - StLA.)

At my reference desk, and for the librarians who ask me, we count the technology help we give people as a reference question. Back when I was first a library director (and computers were new), my library got a PC for public use (very cutting edge in mid-80s, it increased the computer [PC] count in the building by 33%). We counted the help we gave folks with using Word, logging on to AOL (or CompuServ or what ever other service) as a reference question.

I think that Susan's analogy is apt. I'll also note, that with the move to e-government, and closing of agency offices, more and more folks count on public computers for basic help. In a glance at our stats over the past year, "computer assistance" as a category accounts for about 1/3 of all of our walk-in traffic. That is a significant portion of our business (and busy-ness) to not measure.

John DeBacher (WI)

I'm with Susan—the “squishy” factor of the reference data collection is too great. On the one hand, I'm sure researchers and larger libraries want to be able to validate the question-answering role of libraries, but we know too well that if we cataloged the data elements, “reference” would get shelved in fiction.

In fact, since I have been more vigilant in requiring libraries to either count or survey (no more “rough estimates”), our rate of submission has dropped us below the threshold where WI's reference even counts nationally. I still send the libraries reminders in September to do a survey week in October, but who has time, and who remembers? I speculate that even the numbers that I do receive are largely fabricated.

Now that I got that out of my system, I also agree with Susan and Mr. Golrick that computer assistance can frequently count as reference. Not “how do I print this?” but “How can I find that free tax service?” or “Can you help me set up an email account?”

If we are going to continue to collect reference statistics, then we need more detailed and uniform guidelines on what is collected. I suspect most of us are still relying on the 1987-vintage [Output Measures for Public Libraries](#) (get it for only a penny through Amazon!) for definition and procedures.

Unemployment payout for former employee -- benefit or "other"

January 19, 2012

Question

Susan Mark (WY)

One of my libraries had a large unemployment payout to a former employee. They were going to report it under other, but I am thinking maybe this should go under benefits?

Opinions wanted!

SDC Comments

Susan Mark (WY)

Thanks for all the sage advice on a day when I'm brain-foggy!

Edie Huffman (IN)

I'd certainly think about benefits. That is probably how it was originally budgeted.

Leased Computers Expenditure

February 21, 2012

Question

Bruce Pomerantz (MN)

A small library leases its 9 computers for \$2,800. Because this is a yealy expense, I'm inclined to categorize this as an operating expenditure, not as capital, which is how the librarian entered it.

Next year, the library will bid the lease. If a new vendor receives the contract, there will be costs for set up. I still think the additional cost should be categorized as operating.

Thoughts?

SDC Comments

Katina Jones (MO)

I vote for putting it in Operating Expenditures – because it's a yearly expense. The annual costs related to having their own computers would be listed as Operating, right?

Edie Huffman (IN)

Sounds right to me.

Peter Haxton (KS)

I agree, it should be operating.

Stacey Malek (TX)

I agree.

Kathy Sheppard (SC)

I also agree in theory. Our problem is, each of our counties has its own unique definition of what is included in non-building "capital" expenditures. Some include library collection inventory as capital. Others include oddball items like the computer lease. We settled long ago on telling the local libraries to use their county's definition of capital – at least that way they get consistent numbers from one year to the next, even if some of their purchases are not strictly comparable to other libraries. We can generally pull out the actual building funds anyway. Also it is more likely the library can get the correct figures from the county if they use county nomenclature.

We have had this discussion on the list before, and someone mentioned there is a good federal definition of "capital" somewhere but I confess, I did not track that down as do not need another big change in definitions right now -- still getting a lot of flack about the "internet uses/users" change this year. But I would like to see that definition if anyone has it to hand.

Frank Nelson (ID)

http://clinton3.nara.gov/pcscb/staf_define.html

Not a particularly up-to-date document, but it does remind us of the perennial problem of nailing down the definition of capital. As long as such weasel words as "locally accepted accounting practices" are applied to non-building capital expenditures, there will be no consensus.

Kathy Sheppard (SC)

Exactly. Maybe what we should do is think through that definition and specify that libraries include ONLY expenditures for facilities. But then would that include renovations, landscaping, new roof, building design, bookmobile or other library vehicle, etc.?

I do think it's worth discussing since it seems to come up pretty frequently in this group.

Thanks for the definition, Frank.

Bruce Pomeranz (MN)

Frank Nelson's and Kathy Sheppard's recent communications demonstrate the need for a definition committee that interprets the definition. This current method of gathering ideas from everyone can be chaotic. At least in this specific case, everyone is in agreement.

Daria Bossman (SD)

Yes, a Definitions committee is definitely needed! I second that thought! Daria Bossman (SD)

Katina Jones (MO)

(Kathy) I may be too literal for my own good, but I'm not sure what is unclear about our [current definitions](#) (link to WebPLUS User Guide):

OPERATING REVENUE (p 45, PDF p 49)

Report revenue used for operating expenditures as defined below. Include federal, state, local, or other grants. DO NOT include revenue for major capital expenditures, contributions to endowments, revenue passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover). (Funds transferred from one public library to another public library should be reported by only one of the public libraries. The State Data Coordinator shall determine which library will report these funds.)

OPERATING EXPENDITURES (p 46, PDF p 50)

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

CAPITAL REVENUE (pp 47-48, PDF pp 51-52)

Report all revenue to be used for major capital expenditures, by source of revenue. Include funds received for (a) site acquisition; (b) new buildings; (c) additions to or renovation of library buildings; (d) furnishings, equipment, and initial collections (print, non-print, and electronic) for new buildings, building additions, or building renovations; (e) computer hardware and software used to support library operations, to link to networks, or to run information products; (f) new vehicles; and (g) other one-time major projects. **Exclude** revenue to be used for replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. Exclude income passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover). Funds transferred from one public library to another public library should be reported by only one of the public libraries. Report federal, state, local, and other revenue to be used for major capital expenditures... (emphasis added)

Total Capital Expenditures (p 48, PDF p 52)

Report major capital expenditures (the acquisition of or additions to fixed assets). Examples include expenditures for (a) site acquisitions; (b) new buildings; (c) additions to or renovation of library buildings; (d) furnishings, equipment, and initial book stock for new buildings, building additions, or building renovations; (e) library automation systems; (f) new vehicles; and (g) other one-time major projects. Include federal, state, local, or other revenue used for major capital expenditures. Only funds that are supported by expenditure documents (e.g., invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Estimated costs are not included. Exclude expenditures for replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. Exclude contributions to endowments, or revenue passed through

to another agency (e.g., fines). Funds transferred from one public library to another public library should be reported by only one of the public libraries.

Edie Huffman (IN)

And 3rd

Kathy Sheppard (SC)

Katina,

I probably jumped in there too hastily and without referring to the current definition, which you are right to bring forward, so thanks for that. My difficulties arise where there are gray areas, and I do get questions like, Is a USED vehicle a capital purchase? (We decided it was new to them, so yes, but the county did not consider that a capital expenditure because it did not fall into their “capital” budget.)

The harder thing for library directors, especially new directors in less sophisticated counties where bookkeeping is still an inexact practice and fines are collected under the circ desk in Tupperware containers, is not so much understanding the definition as getting the dollars right, tracking down the “expenditure documents” and coded line items for funds spent on behalf of the library but for which there is no easily discovered paper trail. Here’s an instance that required the time of several people to make the decision: Is our big landscaping project (included in a countywide, county funded effort) a capital expenditure? The library thought it was important to record this as it was an important capital improvement, but they couldn’t nail down the dollar amount for just the library’s part of the project. I think we decided not to include, following the guidance regarding invoices/contracts, but the library saw the need to begin keeping a separate record of projects and expenditures like this. But now the figure reported in the survey was no longer useful for that library. And how many others?

Well, it’s not all THAT bad in most of South Carolina’s libraries. But because so much is incorporated in the definition I do have to suspect that a lot of the capital numbers are fudged. Broad definitions like these makes it hard, in my view, for libraries to make meaningful comparisons.

Maybe it would be better to report JUST expenditures for buildings – isn’t that what we are most interested in, in this element? If I want to know how much money was spent on building new libraries in our state, I must call around and check the figures reported in the survey, and weed out, as possible, the vehicles, computers, e-book collection for the branch that got a new roof, etc.

I know this discussion was diligently carried on over the years and the definitions were arrived at for good reasons, and maybe they are still good reasons. Still, we want the numbers to be useful, so it might be good to revisit these particular elements and examine how the figures are being used today. I think committee is a good way to do that.

Frank Nelson (ID)

Ah, Friday mornings.

Yes, having our definitions on top is the way to go. Remember that these definitions are the product of two decades worth of ongoing committee and subcommittee work, as well as the annual balloting process which has served us well despite the chaos and clunkiness.

We and all our predecessors have always wanted precision and cleanliness in our definitions and collection methods. The fact that many of these questions of interpretation persist underscores the slipperiness of some of our most cherished elements.

There really are some holes that are still not plugged with this capital/operating thing. It is often a shell game for municipal and county governments at year's end when they struggle to balance the budget. Now you see it, now you don't.

Every now and then, it has been suggested that we ask for building expenses only, but even that calls for some deliberation as we would have to examine lease agreements here as well as for computers. Just because there is a yearly payment doesn't make it an operating expenditure.

And the beat goes on.

Edie Huffman (IN)

Frank:

What a treasure we have in you! Thanks so much for your memory, caring and sharing. Have a great weekend!

Federal Stimulus Funds

February 21, 2012

Question

Bruce Pomerantz (MN)

A library received \$19,000 from an organization that received a federal stimulus grant. Normally, I would list money obtained from an organization that received the original grant as "other funds." However, I suspect that the grant recipient did not have much discretion what to do with those funds. Should this money be classified as Other or as Federal, which is how the library entered it and which I tend to agree due to the restrictions probably placed on the funds by Uncle Sam?

SDC Comments

Susan Mark (WY)

Did the \$19,000 come from stimulus grant money? If so, I'd consider that to be pass-through federal funds.

Edie Huffman (IN)

That probably is the best way to report it. Having it come from another agency does somewhat muddy the waters!

John DeBaucher (WI)

If I distribute Gates funds to a library, it's not state money--it's other, and if a library gets CDBG from their county, it's still Federal--not local. If it quacks and waddles--it's still a duck, even if it comes out of the hen house. Consider the source.

Issue: E-rate discounts

March 14, 2012

Question

Nicolle Steffen (CO)

Quick question about e-rate...

One library wrote: “we always included E-rate here [federal revenue] because we received \$\$ back – this year we are only paying discounted amounts to vendors – they receive the funds from the Feds and we never see it. Should we calculate what the amount is that the vendors receive on our behalf?”

My initial reaction was to not count the discount. I don’t think the intention of the report is to include discounts only revenue, so there is no need for the library to calculate the discount and include it in revenue. ***Anybody else have a different take?***

(I thought this might have been discussed before, but I couldn’t find it on the wiki.)

Thanks in advance.

IMLS Response

Deanne Swan (IMLS)

Hello all,

Thank you, Nicole and all the SDCs who responded, for the question and comments. We have done some research, and together with your comments, this is what we have found.

As several of you have mentioned, e-rate funds are not federal funds. Although the FCC, a federal agency, sets the rules for the allocation and disbursement of e-rate funds and approve the annual expenditures, the funds themselves do not come from or through the FCC. E-rate is not part of a budget that is passed by the U.S. Congress or signed by the President. The funds do not come from taxes, but from a fee attached to services from telecommunications companies which are then put into the USF (Universal Service Fund) that is administered by the USAC (Universal Service Administrative Company), an independent, not-for-profit corporation specifically designated to deal with these funds (47 CFR 54).

Part of the problem arises because of the way e-rate is administered. E-rate operates either as a discount or reimbursement. To that end, some libraries never see the funds and may never know the actual amount of the discount, whereas others pay the money and are reimbursed. Thus, for some libraries, the amount may be buried on a document which they never see, but others have clear documentation associated with the exact amount for which the library was reimbursed. This exacerbates a problem in the reporting on the PLS. If the discounts are not reported as expenditures, this results in an under-representation of the cost to run a library. If the funds are put in the

expenditures, but not in the revenue, the library may appear to be running a deficit, which would be inaccurate.

It is clear, at the very least, that e-rate funds should not be counted as Federal Revenue (#302); they are best reported under Other Revenue Sources (#303).

Regarding the reporting under expenditures, one thing that might help is the description of the data elements for expenditures:

OPERATING EXPENDITURES

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

Thus, if there is an invoice sent to a library that indicates the amount of the e-rate discount (i.e., supported by documentation), then the library can report this as an expenditure under Other Operating Expenditures (#357). In such a case, the library should also report the e-rate funds that supported the discount in Other Revenue (#303). If no such documentation can be identified, then the amount should not be reported in either revenue or expenditure.

Although this might lead to inconsistent reporting across libraries, it has the benefit of maintaining the correct balance between revenues and expenditures, such that no library reports figures with e-rate in one category but not the other. In addition, it also allows for libraries with the information to report data that more fully reflects the funds expended to run the library, without putting an undue burden on those libraries for which the amount of the e-rate discount is not reasonably recoverable for reporting purposes.

I have also attached a Word document that includes the original post, the comments, and some of the research we found. We hope you will find this useful as you understand this issue.

If you have any questions, please do not hesitate to ask.

Best, Deanne

SDC Comments

Scott Dermont (IA)

I never count the discount. I only have them count e-rate if they actually receive the funds directly. This happens very rarely, at least in Iowa.

Katina Jones (MO)

Nicolle,

I would not count the discount. As you mentioned, the intent is to consider revenue, not what was not paid.

On another note for the group, I just had a discussion with the person here who helps our libraries with E-rate and she said we should NOT count it as Federal Income and list it as Other Income. What do other folks do??

Scott Dermont (IA)

I've always counted it as federal as I thought that was the source. I thought it was a pass through.

Bruce Pomerantz (MN)

I differ from Scott and Katina:

- 1) I do not consider E-rate as federal funds. Tax money is not involved. Federal law requires that the vendor either provide a rebate or a discount.
- 2) To me, the discount is akin to funds expended "on behalf of" (Page 46, Operating Expenditures explanation), which we include in Expenditures.
- 3) For every "on behalf of" dollar in the expenditures, my libraries indicate an equal amount as revenue, typically in the "Other Operating Revenue" category.

Scott Dermont (IA)

So, does that mean that vendor is not reimbursed at all? I thought this money came from federal funds? Now I'm confused.

Katina Jones (MO)

Here is the explanation I referred to earlier in response to me trying to figure out if E-rate reimbursements were Federal funds (i.e., tax money):

This is a common misconception, but no, E-rate funds are not Federal Tax dollars. The charge to everyone's telephone and cellular bill goes into an independent fund administered by the Universal Service Administrative Company (USAC), a not-for-profit organization set up to oversee the fund. The only connection to the Federal Government is that the FCC sets the rules that USAC uses to administer

the fund. The Federal government cannot touch the money, but the FCC rules sets and can change rules that USAC must abide by and how much can be spent out of the fund for the programs that draw money out of it annually. The FCC also has to approve the expenditures annually before the awards can be announced or released to the recipient schools and libraries (and the other programs supported by the fund). Auditors that perform the audits are independent contracting firms that are not under the control of USAC or the FCC, but the FCC processes the contract and USAC pays for it out of the E-rate fund. It is a very different relationship.

Missouri has an amount taken out of telephone bills for a Missouri Universal Service fund as well that pays a set amount for low income and disabled people on their telephone bills. It's guiding agency is the Missouri Public Service Commission and Central Bank administers the program.

Clear as mud, right? If nothing else, E-rate reimbursements should not be listed as Federal GOVERNMENT revenue because it is not government money. Our definitions for Operating Revenue (300-304) don't specify tax money, but I've made the assumption that government money = tax money.

John DeBacher (WI)

Unless it helps with job security, I think ferreting out whether revenues are truly tax \$ or not is unnecessarily complicated and frustrating. For revenues, if it swims like a duck and it quacks like a duck, and it is legislated funds collected and appropriated by a governmental body, then the revenue should follow the appropriating source.

Trying to track discounts as some kind of in-kind funding would put me over the edge. And in our case, much of the e-rate discount is aggregated and applied for wide-area-networks at the state and cooperative level.

I agree with Nicole's inclination to have libraries report e-rate funds received as revenue under federal—it is a federally legislated program.

Bruce—I don't know how local appropriations are done and tracked in MN (maybe each city or town has to set a mill rate for library support), but in WI it would be very difficult to determine whether the source of the library appropriation is all from tax levy and not fees, state aid to local communities, or fund balance. It's just an appropriation, and libraries report it as local revenue. At the state level, our major source of library support (for regional system aid, BadgerLink databases, and some grants) is not tax money, it is from the state universal service fund, and it is appropriated by the legislature in each biennial budget. The way I see it, those "fees" are not fundamentally different from sales taxes paid by end users then distributed according to the legislative action that set them up. They are revenues from the state. They swim and quack and we hope they don't fly away.

Bruce Pomerantz (MN)

A U.S. Court of Appeals ruled that even though E-rate seemingly quacked like a duck and seemingly walked like a duck, E-rate was not a duck, i.e. federal funds. That's how Clinton finessed it around Congress, which is the sole authority for levying taxes.

It took me several years to get the libraries to list their "on behalf of" in (a) expenditures and also (b) list it as revenue. My winning argument for (a) was if you lost that revenue source, you would have no proof of how much it costs to truly operate the library and for (b), that if they did not include it, it would appear that they were running annual deficits in many cases.

Diana Very (GA)

But these funds are not revenues, they are a reduction of an expense. They should not be included in revenue from the federal government.

Robert Keith (NJ)

I agree with you Diana. The E-rate program "provides discounts to assist most schools and libraries in the United States to obtain affordable telecommunications and Internet access." (<http://www.usac.org/sl/about/overview-program.aspx>) Calling it federal funds is also a misnomer. The funds pass through USAC but are not raised through taxes as such.

Katina Jones (MO)

Bob and Diana – some libraries in Missouri do choose to get a reimbursement instead of a discount.

Diana Very (GA)

Even if it's a reimbursement, it's still not revenue. It will be applied as a discount or reduction to the expense.

Scott Dermont (IA)

Yes, we have some in Iowa that do as well. But they are very few. Most see it as a discount and we tell them to not report it as revenue. I would be hesitant to ask them to report it as revenue as they may not actually see what the full amount of their non-discounted bill is. Some vendors may show it, and some may not, I'm not sure. Iowa has lots of local phone companies and my guess is they all do things differently.

Nicolle Steffen (CO)

Thanks for all the input. I appreciate y'all sharing your expertise.

Since posting the question to the SDC listserv I've received feedback from several libraries that it would indeed be nearly impossible to calculate their e-rate discounts accurately and comparably. Most thought it was not worth the effort. Translation: some respondents simply won't do it.

Maybe this one isn't worth torturing ourselves over, especially if we suspect the data collected is dodgy.

Thanks again!

Scott Dermont (IA)

Deanne,

Thank you for clearing this up. I clearly did not understand the basics of E-rate funding. This has not been a huge deal for me as I'd say 99% of my E-rate libraries receive this as a discount. I've always told them to not report it as revenue or expenditures. I'm not sure that I want to encourage them to start reporting it now as I think they are pretty well trained not to. I'll have to give this some thought on how I want to deal with it in the future...

Nicolle Steffen (CO)

Thank you, Deanne! Your explanation is very helpful. I appreciate all your research and the detailed explanation. This will help me explain the PLS reporting to my colleagues.

That being said, I worry about comparability across libraries. If all the libraries aren't reporting the same thing (intentionally or unintentionally) it compromises the data element.

[As an aside, *I understand* the difference between the "fees" versus "taxes." (A great explanation, by the way.) But there is a lingering feeling of it being a distinction without a difference. I can hear ducks quaking...]

Thanks again everyone...especially Deanne.
Nicolle

Edie Huffman (IN)

We have 3 kinds of e-rate income in Indiana. 1 is state reimbursement of erate expenses, the 2nd comes from the federal government paid directly to individual libraries (federal is federal, I believe) and apparently some few libraries get erate money directly from the vendor? --Edie

Edie Huffman (IN)

Sounds like some discussion is needed!

Edie Huffman (IN)

John:

What a well thought out, clear response. That's why we have public libraries in Indiana report something as state money that is not, but it is collected and distributed by the state. So, I buy the duck analogy. Best, Edie

Lynn Shurden (MS)

Just weighing in on this post after having been in Philadelphia for a week.

In Mississippi, because some libraries received discounts and some reimbursements after payment, we've always posted these funds as "other" income, IF the library actually received money from the phone company, etc. for reimbursement. I actually have a line item in my public library budget for telecommunications expenditures and phone services, and one for e-rate reimbursements, which then is reported as other income.

Don't know what others are doing, but this is the way we've been handling it for some years now.

Lynn F. Shurden, State Data Coordinator, Mississippi

Other research:

Kim Miller (IMLS)

Deanne,

The mentor list is what you want to look at. Peter Haxton is Colorado's mentor.

The Mentor list is located on: <http://www.ims.gov/assets/1/AssetManager/PLSMentors.pdf> (I have a hard time viewing the PLSC wiki on IE so I use Firefox.)

Also located at: S:\OPRE\Statistical Program\Library Statistics\Library Statistics Surveys\PLS and StLA Surveys\PLS\PLS Directory\PLS Mentors 2012 - geo.doc

The LSWG list is located on the LSWG wiki: <http://lswg.wikispaces.com/Members> and also at: S:\OPRE\Statistical Program\Library Statistics\Library Statistics Surveys\LSWG\LSWG Directory\LSWG directory - 2012.doc

Please see this page for FAQs about E-Rate, the Universal Service Fund and the Universal Service Administrative Company.

<http://www.universalservice.org/about/resource-room/faq/> See Q4 & Q5.

http://www.edlinc.org/get_facts.html

How do schools, libraries and consortia receive E-Rate discounts?

Applicants do not receive funds directly. They receive a discounted price. Once an application is approved, the school, library or consortium accepts a bid from the telecommunications service provider of its choice. The provider receives funds from the federal government to make up the difference between the discounted price and bid price. If no local telecommunications providers bids on the work, the local telephone company is required to provide the requested telecommunications service as the carrier of last resort. For more information about the E-Rate program, visit the FAQ page at the [Universal Service Administrative Company](http://www.universalservice.org/about/resource-room/faq/) (USAC) where general questions about the Universal Service Fund are posted.

From USAC website FAQ:

<http://www.universalservice.org/about/resource-room/faq/>

USAC is an independent, not-for-profit corporation designated as the permanent administrator of the federal Universal Service Fund (USF) by the Federal Communications Commission pursuant to Part 54 of Title 47 of the Code of Federal Regulations.

USAC is not a federal government agency or department or a government controlled corporation as that term is defined in Sections 9101-02 of Title 31 of the United States Code. USAC administers the USF and its four programs for high cost companies serving rural areas, low-income consumers, rural health care providers, and schools and libraries. The USF helps provide communities across the country with affordable telecommunications services.

Q2: What is the Universal Service Fund?

A2: The Universal Service Fund (USF) is money collected from telecommunications companies and dedicated to fulfilling the goals of universal service. Under the authority of the 1996 Telecom Act, the Federal Communications Commission (FCC) created the USF as well as the Universal Service Administrative Company (USAC), the organization charged with administering the USF.

Telecommunications companies make contributions to the USF based on revenues from providing international and interstate telecommunications services.

In 2009, the USF totaled over \$7.3 billion and was divided among the four USF programs: High Cost, Low Income, Rural Health Care, and Schools and Libraries. USAC manages the collection and distribution of money in the USF. Below are brief descriptions of each program, along with 2009 levels of USF funding:

The Schools and Libraries Program, commonly known as E-rate, provides discounts to schools and libraries in every U.S. state and territory for telecommunications, Internet access, and internal connections. In 2009, the program provided about \$1.9 billion in support.

Q4: Who pays for the USF?

A4: As required by the 1996 Telecom Act, all telecommunications carriers providing international and interstate service make contributions to the Universal Service Fund. Consumers may notice a "Universal Service" line item on their telephone bills. This line represents a charge by a telephone company to recover its mandated contributions to the USF. USAC collects these contributions and then allocates the proceeds to the four USF programs: High Cost, Low Income, Rural Health Care, and Schools and Libraries.

Q5: How does USF funding work?

A5: Paying into the USF (Collections):

All telecommunications carriers that provide international and interstate service make contributions to the USF. The amounts of these contributions are determined by projections of the aggregate demand for USF support, which USAC submits each quarter to the FCC. The FCC reviews these projections and determines the percentage of international and interstate revenues that carriers must pay into the fund.

Paying out of the USF (Disbursements):

USAC allocates money from the USF to fund the High Cost, Low Income, Rural Health Care, and Schools and Libraries programs. Entities eligible for support from these programs submit information to USAC for processing and evaluation, leading to disbursement of USF support to those approved for funding. Schools and Libraries: Eligible applicants in this program open a competitive bidding process to receive bids on the products and services they seek. Service providers submit bids, which are reviewed by applicants under applicable program rules. Applicants select the service provider for the service or product and submit the appropriate forms to USAC for review. USAC then makes a funding commitment decision based on the program rules. Once funds are committed, applicants file invoices for the products and services they use.

Stated on page 11 in A Catalyst for Change: LSTA Grants to States Program Activities and the Transformation of Library Services to the Public:

Other Sources of Technology Support

Two other major sources of support help address connectivity and information technology needs in U.S. libraries. The first is the investment made by the Bill & Melinda Gates Foundation, through its U.S. Libraries Program. This program, which has been in existence since 1997, provided an estimated \$31 million in program and technology support to libraries across United States in 2007. The program supports the purchase of computer hardware and connectivity including upgrades, training for staff, and helping libraries advocate for local funding.

The second source of support for library technology is the E-Rate program.¹² Established in 1996 in the Telecommunications Act (P.L. 104-104), this program allows libraries to apply for telecommunications discounts for the connections and services needed to fulfill educational purposes. The discounts range from 20 percent to 90 percent, depending on the eligibility of the school or library applicant.¹³ The program is administered by the Universal Service Access Company (USAC), and is not supported with federal funds but with contributions from interstate telecommunications providers. Because E-Rate administration does not disaggregate expenditures to libraries from those of schools, the Federal Communications Commission does not report on number of libraries served through E-Rate or the total program expenditures for improved library service.¹⁴

From the PLS data documentation

OPERATING REVENUE

Report revenue used for operating expenditures as defined below. Include federal, state, local, or other grants. DO NOT include revenue for major capital expenditures, contributions to endowments, revenue passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover). (Funds transferred from one public library to another public library should be reported by only one of the public libraries. The State Data Coordinator shall determine which library will report these funds.)

301 State Government Revenue

These are all funds distributed to public libraries by state government for expenditure by the public libraries, except for federal money distributed by the state. This includes funds from such sources as penal fines, license fees, and mineral rights. Note: If operating revenue from consolidated taxes is the result of state legislation, the revenue should be reported under state revenue (even though the revenue may be from multiple sources).

302 Federal Government Revenue

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

303 Other Operating Revenue

This is all operating revenue other than that reported under local, state, and federal (data elements #300, #301, and #302). Include, for example, monetary gifts and donations received in the current year, interest, library fines, fees for library services, or grants. Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donations.

OPERATING EXPENDITURES

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

357 Other Operating Expenditures

This includes all expenditures other than those reported for Total Staff Expenditures (data element #352) and Total Collection Expenditures (data element #356). Note: Include expenses such as binding, supplies, repair or replacement of existing furnishings and equipment; and costs of computer hardware

and software used to support library operations or to link to external networks, including the Internet. Report contracts for services, such as costs of operating and maintaining physical facilities, and fees paid to a consultant, auditor, architect, attorney, etc.

Units and Titles

March 20, 2012

Question

Ann Reed (OR)

Hi All,

I'm sorting out reporting confusion about figures of downloadables purchased by our state's independent Overdrive consortium.

Here is my quandary –

For Physical items, the definition is for “units” – e.g. the number of things. So if half of a library's 1,000 books are the “Girl with the Dragon Tattoo”, the library would record owning 1,000 printed materials.

For downloadables, the definition indicates titles –

“453 Audio – Downloadable Titles

These are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced (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) or through a physical library catalog.

It seems that most my libraries ignored titles, and reported units. It does make quite a difference and I'm wondering if we should be counting units for downloadable items as well. The way these downloadables are licensed, only one user can use a copy at a time, just like hardcopy. The libraries had to buy multiple copies of popular titles. It would put this element on the same counting basis as hardcopy. When I look at the report I finally wrestled out of the consortium, there were 8,569 titles of downloadable audio books, but 15,252 total units of same.

What do you think?

SDC Comments

Lisa Hickle (OH)

I agree. 😊

Janet Eklund (NH)

If we count print titles, including duplicates, why would we not count duplicate downloadable titles?

"Printed materials are hard bound or softbound. Report the number of physical units. Count duplicates. **INCLUDE** government documents. **EXCLUDE** periodicals, books-on-tape, and microforms

Lauren Miklovic (RI)

I agree with Janet. All those downloadable books were purchased individually (for the most part), so they should be counted as same.

IMLS Response (3/23/12)

Kim Miller

SDCs,

The PLS Census and IMLS folks had a teleconference this morning to discuss Ann Reed's question and SDC comments on units and titles for "**453 Audio – Downloadable Titles**". There was discussion of what the states had reported in FY2010 (all but 15 states were able to report data for the data elements that passed in 2010 for audio/video downloadable).

IMLS will be receiving the unimputed data files from Census in the next few weeks. Along with the findings on #453 from Census and IMLS we will send information to the Library Statistics Working Group (LSWG) for further discussion before and during their meeting June 7.

We also will know (by April 16th - ballot will be sent out Monday, 3/26 in the afternoon) if the proposed data element for change on numbers 453 Audio – Downloadable Titles & 455 Video – Downloadable Titles will have passed.

#453 & 455 Definitions s for change

Currently reads:

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) or through a physical library catalog.

Change to 2nd paragraph to:

Report the number of titles. Report only items the library has selected as part of the collection.

Thank you all!

Question About Counting Service Hours

Counting Hours for Outreach and Programs When Library is Not Normally Open

June 6, 2012

Question

Eileen Kocher (PA)

I had a question from a public library here in Pennsylvania asking if they should count hours for outreach and programs when the library is not normally open.

After reading the definition for data element 500 Public Service Hours Per Year, I'm not sure. Can you give me some guidance?

Some examples of hours for outreach and programs that the library would like to count:

- Provide programming at Garver YMCA Healthy Kids Day 3 hours
- Provide programming Sprig Dam Weekend. We provide library information approximately 10 hours each day for three days and programming 5 hours each day at an offsite event
- Programming at Relay for Life
- Community Events at Library when we are not normally open
- Christmas tree open house, patron can sign up for cards, check out books and we provide a program 4 hours
- Halloween Patrons can sign up for cards, check out books and attend a program 3 hours
- Memorial Day Amazing race patrons can check out books, use the internet, check out books and attend a program 5 hours
- Spring Fling in May same scenario as above 6 hours
- Outreach - Storytime at Head Start, various Daycares and school programming offsite when library is closed 1.5 hours each

Thanks!

SDC Comments

Susan Mark (WY)

Although I don't see where it is spelled out specifically, my initial response is to not allow it. When I think of service hours, I think in terms of when the building is open to the public.

Edie Huffman (IN)

That is my understanding, too.

Joe Hamlin (MI)

I agree, the note reads "Include the hours open for public service for Centrals (data element #209), Branches (data element #210), Bookmobiles (data element #211), and Books-by-Mail Only." However, it sounds like the library is still providing service, we have some Michigan libraries that do the same kind of activities. Perhaps 500 should be rewritten to include Outreach.

Edie Huffman (IN)

I would suggest that public service includes all services, not just a program.

John DiBaucher (WI)

I agree. "Hours" is tied to outlets. They have a location (even if a bookmobile), an organized collection, paid staff, and regularly scheduled hours for being open to the public. I don't think those special programs or outreach meet those criteria. They may qualify as programs, but artificially inflate the library service hours if reported there.

Michele Balliet Unrath (ND)

I agree with Susan's determination; as traditionally the data element in question is used to track the time/hrs that **paid staff** are being utilized to make said outlets available for the public to access. I would recommend that libraries count "outreach" (as referenced below) as programs; if these events are planned and sponsored or co-sponsored by the library.

Melissa Brown (WV)

In West Virginia, outreach is counted as a program as well. We could possibly begin tracking outreach time used, but I'm picturing a nightmare of "it took 4 hours to prepare, the drive was 1/2 hour, etc." I encourage my Library Directors to make extensive notes, explaining the programs. I think they feel a little more validated then.

IMLS Response

The intention is to capture how many hours the library is open for business. The definition states "This is the sum of annual public service hours for outlets" -- and non-library outreach sites are not outlets. Also,

this figure relates to #713 where the individual outlet hours are reported. Expanding the definition to include other extra programs could lead to inconsistencies in reporting, making it more difficult to link this information to other data elements such as budget and staffing. We also agree with earlier comments that outreach program activity would be captured appropriately under library programs (#600 – 605), which include “on- or off-site”.

Clarification: Data Element #451 E-Books (Consortium)

August 16, 2012

Question

Peter Haxton (KS)

For a consortium, should the libraries only count the units that they selected, or all of the units? What if the consortium members each pay in the same amount of money and the items are selected by someone else?

I feel like we came out on the side of only counting the items selected by the individual library.

Census reply:

I think it makes sense to only count the items selected by the individual library.

Schrodingers' Database

(We are counting the titles in collections such as Overdrive. Are we also counting Overdrive as a database?)

December 10, 2012

Question

Bruce Pomerantz (MN)

We are counting the titles in collections such as Overdrive. Are we also counting Overdrive as a database? Last year, I asked this in a follow-up to a question to Online Database Count that's archived in the *Data Element Definitions: Questions*. . . section but there are no responses. Have we decided this and I just do not remember?

SDC Comments

Susan Mark (WY)

My feeling is that we would either count the titles, or we would count the overall service as a database, not both.

Edie Huffman (IN)

I believe it should be one or the other, not both.

2013

Need a Ruling on Freading

January 8, 2013

Question

Susan Mark (WY)

Before I submit this: Freading: 20,000 ebooks or 1 database?

SDC Comments

Katina Jones (MO)

Isn't that the one that has unlimited, simultaneous checkouts for each purchased unit??

Susan Mark (WY)

Yes it is. Usage is throttled through a token system so downloads per patron is limited somewhat, but if every patron in the state wants to download the same book, it will do it.

Nelson Worley (VA)

Did we not decide that that Freading would be counted as "units of purchase?"

Rob Geiszler (VIT)

Don't we have to answer the question as to whether the librarian "selects" the items included?

Susan Mark (WY)

Yes, we do. I have an email in to our WYLD office to see how much selection (if any) goes on with this one.

Juan Lee (UT)

My understanding is that there is NO selection of titles in Freading and Freegal. You just purchase access to the entire catalog. To me, that sounds more like a database...

Daria Bossman (SD)

I agree. That was my understanding.

Diana Very (GA)

Looks like database to me.

Susan Mark (WY)

OK. Works for me. Database it is. Thanks, all!

Nicolle Steffen (CO)

Agreed. After reviewing the PLS definitions and licensing/usage agreement (and much hand-wringing), in CO we decided to counted Freading as a database last year.

Scott Dermont (IA)

The question I've been asking myself in these cases is "Does the library have any control over what titles are in this resource." If the answer is yes, I'd count the individual titles. If the answer is no, I count it as a database.

Katina Jones (MO)

But even if they have control over the content, if multiple/every patrons can use one copy simultaneously (like a PDF of an article on engine repair), then it should be counted as a database. Right?

Susan Mark (WY)

That's where we get back to the "units of purchase" concept. For a one-file, one-use, the unit of purchase is the copy. For an unlimited use, the unit of purchase is the title. The distinction between database and ebooks is dependent on whether the library is selecting content, not dependent on the licensing model. Clear as mud?

E-Content Database

Link to database created by Susan Mark (WY):

<http://plsc.pbworks.com/w/page/62572262/e-content>

How to Count Use of Zinio

January 9, 2013

Question

Michael Golrick (LA)

I have a question (pre-survey release, no less) about Zinio. At first I thought that Zinio was like Freeding/Freegal, and come to find out I am wrong.

The library purchases a “subscription” to the magazines on Zinio. So for the collection, it is clear that it counts as an electronic subscription (which *I* am still counting). How to count the uses....each subscription gets unlimited uses for the price paid, but the end user needs to download the whole issue – not just an article. My original idea was that it was a database, but I now have learned that you can’t search within any magazines, and cannot just download an article. Does that mean it counts like an eBook use? I am inclined to lean that way. After all, some libraries will circulate issues of magazines and we count those as circulations (once for each time an issue is borrowed).

I just need a check on this.....Like many of you, in addition to clearing up end of the calendar year stuff, end of the quarter stuff, and generally gearing up for the “spring semester,” I am also contemplating the SLAA survey. (State Library Administrative Agency survey for those not blessed with it. It replaces the StLA survey after a one-year hiatus.)

SDC Comments

Ann Reed (OR)

Takes page from Wyoming and blows past beating head on desk... grabs staple gun and aims at temple....

If they don’t choose titles, its still an aggregated database – it’s just one with lousy indexing which necessitates big gulps of data. As I look at these things, to me its all about how it is licensed.

Susan Mark (WY)

At least in our state, we chose the titles in Zinio

Michael Golrick (LA)

Exactly...you (the library) chooses titles, you can download a full issue (not an article, you ***MUST*** take the whole issue). In that way it is like an eBook where you get the whole thing, not just a chapter which you searched out....

Ann Reed (OR)

Ahh, can everyone use the same issue at the same time? It would seem analogous to magazine issue circulation.

Frank Nelson (ID)

PEZ dispenser. Point blank.

Patience Frederiksen (AK)

It occurs to me that we need to have a chart or a list put up on the wiki with the agreed-upon wisdom of how to count these services as we make decisions on each one. If we don't record our decisions, it is all just blowing in the wind...

To start, let's count the partridge under other materials...
Just more weirdness from Alaska. It's really dark up here.

Laura Stone (AZ)

But the doves probably go under staff.

Lisa Hickle (OH)

I agree, a chart or list would be great! J

Dianne Carty (MA)

Yes, let's put a list together. I can certainly share the spreadsheet we we have put together for Massachusetts—still a work in progress.

Edie Huffman (IN)

Amen! Memory is not what it used to be! --

Susan Mark (WY)

Page is created

<http://plsc.pbworks.com/w/page/62572262/e-content>

And as for the partridge question, this would be my interpretation:

12 drummers drumming -- programs
11 pipers piping -- programs
10 lords a leaping -- program participants
9 ladies dancing -- program participants
8 maids a milking -- staff
7 swans a swimming -- other operating
6 geese a laying -- other operating
5 gold rings -- capital expenditure
4 calling birds -- staff
3 french hens -- materials
2 turtle doves -- staff
partridge -- collection
pear tree -- capital

Ann Reed (OR)

Hmm, but are you sure that the 6 geese a laying -- other operating isn't capital revenue?

Patience Frederiksen (AK)

Thanks to Susan for going ahead and starting a list on the wiki. I like the rationale part of the list.

Now, if we could just start to populate that list with what we decided over the past few years.

Did we decide that Overdrive was a database or that we counted each title individually in each library's holdings?

The periodical databases from EBSCO remain databases, correct?

I have been counting tutor.com/live homework help as a database – is that how everyone else is doing it?

Ann Reed (OR)

I believe we agreed that Overdrive counts as individuals (except for repackaging free books from the internet)

I have been advising people to not count tutor.com as its being pushed as a service more than a collection.

Lauren Miklovic (RI)

Hi Patience,
We count Tutor.com as a database as well.

Robert Jones (IL)

That would be most helpful.

Bruce Pomerantz (MN)

I have been advising people to not count tutor.com as its being pushed as a service more than a collection.

Hmmm. A set of Minnesota libraries use Homework Rescue, which I assume is comparable to Tutor. If I accept Ann's concept, which I'm tending toward, then all of them would be a Supplementary Site but for the fact that there is no administrative entity supervision. DRAT! I wonder if I should add a category within my definition, "contracted." (aka outsourced)

Kim Miller (IMLS)

Thank you, Susan! I have linked the e-content wiki page from the "Data Element Definitions: Questions Comments Feedback Input Corrections" wiki page.

<http://plsc.pbworks.com/w/page/7422611/Data%20Element%20Definitions%3A%20Questions%20Comments%20Feedback%20Input%20Corrections>

Edie Huffman (IN)

Susan: This is great! Thanks a million.

Bruce Pomerantz (MN)

I researched the discussion that we had and then checked the e-content list susan created. We failed to list Zinio as to whether or not it is a database.

There seemed to be two answers: If titles are chosen, include usage in circulation. If purchased as a package of titles with no selection on the part of the library(or consortium, whichever the case may be), count it as database and do not include usage in circulation.

Correct? (And I thought thinking of light as both a wave and a particle was difficult to grasp.)

Bruce Pomerantz (MN)

I haven't received any responses to the below. I'd appreciate some help on this one.

Laura Stone (AZ)

I think we may have purposefully skated around the magazine question.

I think your reasoning makes sense as it follows our discussion on e-books. However, when you look at "practice" it makes me wonder if we don't need to continue to work toward better definitions for everything.

Here's my thinking: Library A has a Zinio subscription and individually selects 150 titles. Library B has a Zinio subscription, and after looking over the "100 Most Popular Magazines" decides that list meets its community needs. Library C comes into a windfall, and decides to purchase all (roughly) 1,000 Zinio titles. If we follow the model we've established, Library A gets to count the magazines' circulations, and B and C don't? Really?

I know that some libraries use B&T services to select good-old-fashioned books. Does that mean we should count the circs on those books as something else?

Still thinking,

Jeffrey Kirkendall (NY) - March 18, 2013

Was there ever any consensus on the debate over whether to count Freegal as individual audio downloads or as a database? I followed this thread and checked the site page, but it didn't look that way. Thanks!

Counting “Seniors” versus just “Adults”

February 8, 2013

Question

Katrice Stewart (FL)

I was hoping to get some input on whether or not any of you specifically count “Senior” programs as opposed to just “Adult”. We have been having this discussion lately since we have so many “snowbirds” during the winter months and were discussing whether or not we are meeting their needs. Thanks for your thoughts!

SDC Comments

Kathy Sheppard (SC)

Katrice, we have a survey question for “outreach” in general and that includes Senior programs. In some cases that’s the only kind of outreach libraries so. But we don’t limit that question to just senior services. We would only add such a specific question about programs to the survey if we wanted to track the statewide investment in such services, and we might add the question for just one year. It would be an interesting piece of information. But we would not want to track it every year.

Nicolle Steffen (CO)

In Colorado we do not track programming for “Seniors.”

Although I can see value in tracking this kind of programming, I’m very glad we don’t break it out from “Adult” programming. Selfishly, I just don’t want to do the wrangling around who qualifies as a “Senior.” ;-)

Joseph Hamlin (MI)

Michigan does not track Senior programming either.

Stacey Malek (TX)

Texas does not break out senior programming, either.

Ruth Hyatt (AR)

Arkansas does not yet break out Seniors from Adult patron data.

Edie Huffman (IN)

Indiana does not track Senior programming either. It is somewhat difficult to ascertain the difference between children and YA, and asking (or assuming) people's ages would not go over well. What is Senior, anyway? We have AARP's def., McDonald's and other retailers, etc., etc., etc.!

Lisa Hickle (OH)

Neither does Ohio.

Bruce Pomerantz (MN)

Minnesota's response is similar to Nicolle's with a cautionary coda. A certain coeval (I've been waiting decades to use that word), baby boomers* specifically, will take umbrage at being categorized as "senior" either now or in the future when it's indisputable.

*clue for definition of coeval

One who is of the coeval of which I speak.

Scott Dermont (IA)

Iowa does not currently count senior programming.

Diana Very (GA)

In Georgia we only ask about children, young adult, and adult.

Joyce Chapman (NC)

North Carolina only asks about children, YA, and adult programming too.

Jenny Melvin (ME)

Same here in Maine.

Roberta "Robbie" DeBuff (NV)

Nevada only asks for children, young adult and adult.

Darla Gunning (CA)

California does not track senior programming either.

When we do count programming, it is programs directed at a certain population/age groups and all that attended (regardless of age.) No need to ask people for their ages, we count those that attend because they are interested in a topic/activity or accompanying someone who is. This is true for children & YA programs as well. Really no different than counting circulation of children's or YA material it is about the material that is circulated and not about those that are checking them out!

Eleanor Bernau (NM)

New Mexico asks for children, young adult and "all other **regardless of the age of the person attending.**"

Carole Suzui (HI)

In Hawaii we categorize attendees as juveniles, young adults, and adults

Lynn Shurden (MS)

Our categories in MS are children, teen, and all.

John Myrick (WV)

In West Virginia, we count “Children’s Programs, YA Programs, Adult Programs, Total Programs” and then “Total Program Attendance”. Now that I see it for what it is, I don’t like it and will likely see that we count attendance in each type, and add Sr. Adults (giving definitions for all). This would allow us to track effectiveness of goals/tasks in our 5-year plan better.

Is anyone else out there thinking of changes based on their 5-year plan and the “Measuring for Success” guidelines?

Dianne Carty (MA)

Massachusetts does not track seniors separately.

IMLS Response

We just wanted to jump into the conversation with the hope of disentangling the federal data elements from other data SLAAs or libraries might collect. Specifically, we’d like to comment on how this conversation relates to the data collected for data elements from the PLS FY2012:

- 600 Total Number of Library Programs
- 601 Number of Children’s Programs (a subset of element 600)
- 602 Number of Young Adult Programs (a subset of element 600)
- 603 Total Attendance at Library Programs (based on the programs counted in element 600)
- 604 Children’s Program Attendance (a subset of element 603)
- 605 Young Adult Program Attendance (a subset of element 603)

We’d like to echo what Michael Golrick and others have said and how it relates to the data elements for the PLS. There may be reasons, for strategic initiatives at the state level or for guiding decisions about local service delivery, that an individual library, library system, or SLAA might collect data at a more detailed level than specified for the federal collection. These decisions to collect data are made at the state or local level, and these data are not reported up to the federal collection of the PLS.

When making a decision to collect these types of data or to break-out established federal data elements into smaller components, as is the case suggested here to count Senior Adult programming numbers, it is important to be sure that these numbers can be aggregated accurately to reflect the data definitions in the federal collection that have been shaped and honed over the years by the SDCs. Adult and Senior Adult programming numbers – both for programs and attendance at the programs – are subsumed under data elements 600 and 603. Data for Children’s and YA programs and attendance are subsets of 600 and 603, respectively. From the current data, one could get information on total adult programming by subtracting the children’s and YA from the total numbers, but would not be able to assess which portion of that was specifically geared toward senior adults.

Best, Deanne Swan and the OPRE crew

SDC Comments

Robert Jones (IL)

Same in Illinois.

Early Literacy Station (ELS) from AWE

February 14, 2013

Question

Nicholle Steffen (CO)

How are y'all counting Early Literacy Stations (ELS) from AWE computers? It is my understanding that the learning stations are not connected to the Internet except for updates. Therefore I would not count them as "Internet Computers" nor in the "Number of Uses of Internet Computers." Sound right?

SDC Comments

S

Stacey Malek (TX)

That sounds right to me...

Diana Very (GA)

Me, too.

Lynn Shurden (MS)

We have these and do not count them as Internet Computers.

Outlet Level Data

February 25, 2013

Question

Bruce Pomerantz (MN)

Minnesota collects data at the outlet level of multiple-outlets whenever possible, e.g.: visits, reference transactions, computer sessions, programs, collection, etc. We do not collect budgets at the outlet level.

Aside from collecting the number of weeks an outlet is open, do any other states collect data at the outlet level as extensively as Minnesota? Only those that do need reply. I'll take silence as an indication that your state does not, since I presume this is the majority.

SDC Comments

Scott Dermont (IA)

The only outlet data we collect is the data required for the national level. We have very few multi-outlet libraries (fewer than 10 out of 544).

Nicolle Steffen (CO)

Like Iowa, Colorado limits the data we collect at the outlet level.

Joseph Hamlin (MI)

Like Iowa and Colorado we also limit the data collected at the outlet level.

Ruth Hyatt (AR)

Arkansas collects limited data at the outlet level. Currently, we only collect materials usage, services and programming at the branch level.

Roberta "Robbie" DeBuff (NV)

I'm very new, beginning my 5th week, but wanted to start chiming in. NV collects limited data on Outlets as well.

Diana Very (GA)

In Georgia, we collect everything at the outlet level, except budget, and then aggregate the data for the admin section of the federal survey.

Carole Suzui (HI)

Like Georgia and Minnesota, in Hawaii, I collect everything at the outlet level, except budgets. I compile the data monthly at the state level and annually for the admin section of the federal surveys. We are a statewide system so the budget for the public library system is administered by the Administrative Services Branch (ASB) at the state level. My cubicle is located in ASB.

Dianne Carty (MA)

We collect limited information at the outlet level.

Library Program or Not?

February 28, 2013

Question

Bruce Pomerantz (MN)

To demonstrate Ann's point about constant learning, this question is one NOT for the IMLS books but I'd like some opinions.

Minnesota collects the number of non-library sponsored meetings to demonstrate a significant service that libraries provide, mostly with no cost to the organizations that use the meeting rooms.

A Friends of the Library and a Library Foundation, both independent organizations, use a library's meeting room for their respective meetings. They each have their own boards, they determine when to have meetings, and they set the agenda. A library staff member attends but does not have any authority.

Question Would you consider this a library-sponsored meeting or a non-library sponsored meeting?

Bonus point: If you consider these meetings as providing educational information, should they be considered programs and counted in the Total Number of Library Programs if they are library-sponsored?

All you new members, be free to jump in, the water is fine. We only bite when cornered and there are no corners in the oceans.

SDC Comments

Katina Jones (MO)

In Missouri, we would consider this a non-library sponsored meeting. Key phrase – “independent organizations.” I see this as no different than the local gardening club – of which the library director happens to be a member – using the meeting room... J

Jamie McCanless (WI)

Having a vision and goals in common with the library doesn't define a separate, autonomous group like Friends of the Library or a Library Foundation as being sponsored by the library. Although an educational program open to the public can certainly be co-sponsored by a library and its friends group, a regularly scheduled meeting of either a friends or foundation group would not be co-sponsored with the library just by being held in a library meeting room. (So, don't count their meetings in Total Number of Library Programs.)

Scott Dermont (IA)

I would count them as meeting room use, not as a program. Friends and Foundations are separate organizations.

Nicolle Steffen (CO)

Katina has zeroed-in on the key phrase “independent organizations.” In my book these meetings do not qualify as library-sponsored meetings/events/programs.

Is readers advisory counted as Reference?

March 13, 2013

Question

Joyce Chapman (NC)

I can't figure out if readers advisory should be counted in reference. If not, my directors want to add it as a local question, alongside counts of technology-related one-on-one assistance and job-related one-on-one assistance.

SDC Comments

John Myrick (WV)

I would think that it would/should.

Michael Golrick (LA)

Yes! (I just did a presentation on RA for our Staff Day – for support staff in public libraries around the state).

Here is the part of the definition which makes it so:

502	Reference Transactions	A reference transaction is an information contact which involves the knowledge, use, recommendations , interpretation, or instruction in the use of one or more information sources by a member of the library staff. 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.
-----	------------------------	---

RA has all the critical elements in the first sentence, and I bolded the word “recommendations” for specific evidence. You certainly could include this as one of several categories which “roll up” into your grand total on a state level.

Ann Reed (OR)

Yes, it should be counted as reference, as should teaching people to use the computers. The essence is a patron with a need, a tool (such as book lists, reviews staff has read, etc.) and staff with expertise.

Scott Dermont (IA)

Yes, I would definitely include it. It is a very important part of reference work in public libraries.

Circulation of YA materials included with circulation of children's materials?

April 2, 2013

Question

Ann Reed (OR)

I think I always get a bit confused ever since we broke out YA programming.

I recall we discussed this some years ago with the upshot of most states were counting circ of YA materials with total circ, but not children's materials circ. I see the definition of children's materials doesn't have an age on it to indicate if we are just talking about circ of a juvenile or picture book collection vs. a YA one.

Am I hallucinating??

SDC Comments

Juan Lee (UT)

It could have been mass hallucination (you never know what they put in the water at SDC Conferences) because I seem to recall the same conversation. However, my own definitions do not have an age specified for CIRC. We do use age for PROGRAMS though:

Children are defined as persons age 11 and under, outlined in [The National Center for Education Statistics \(NCES\): Children and Young Adults Defined \[Services and Resources for Children and Young Adults in Public Libraries, August 1995, NCES 95357\]](#).

Bruce Pomerantz (MN)

YA is not counted as Children's materials for circulation. I use the designation Adults for all non-J and include YA there: young adults, adults, older adults, senior geezers, etc.

Susan Mark (WY)

My impression of the children's circ situation when we split out YA programming is that no one wanted to pick up that particular blob of jello and nail it to the tree. I had a vague idea that long, long ago there was a reference to 14 years and under as juvenile circ, but that was not in the official PLSC definition. We simply left ages on children's circ undefined for the time being. I just ask for children's circ from my libraries and don't get too nitpicky, although I think at one point I had the 14-year-old thing in the instructions.

So, should we define that more clearly? What flavor jello would you prefer?

Dianne Carty (MA)

Well, this is what I have in place for definitions since the discussion several years back:

Children: 11 and under

YA: 12 through 18

Adult: over 18

Edie Huffman (IN)

We actually use the definition from ALA's YA group in our standards for materials and programs (they have to provide YA materials and programs). Circulation is still children and adults, and really, adult is anyone over 18, so yes, it covers a lot but we should not be subdividing adults by age-too much of labeling already.

IMLS Response

I located the conversation about circulation of children's materials and YA posted on the "Questions Comments Feedback Input Corrections" PLSC wiki page.

Circulation - Total, Children and do we separate out Young Adult?

<http://plsc.pbworks.com/w/page/22755609/Circulation%20-%20Total%2C%20Children%20and%20do%20we%20separate%20out%20Young%20Adult> (there is an additional question on this page dated 2/4/2010)

I had also posted Carlos's response from that conversation (10/21/2009) on the 551 Circulation of Children's Materials definition's wiki page

<http://plsc.pbworks.com/w/page/7422576/551%20Circulation%20of%20Childrens%20Materials>

A couple of SDCs asked about children's circ being in 2 groups (children and young adult).

Carlos's response:

Our understanding of the children's circulation data element is that it is neutral with respect to age. That is, the circulation number is based on the movement of children's holdings, not the age of the patron checking out the material. Indeed, the definition expressly says that it refers to circulation of children's materials "to all users" (see below). In short, there would be no reason to redefined the children circulation element for people 11 and under.

Wording of children's circulation data element: The total annual circulation of all children's materials in all formats to all users, including renewals.

SDC Comments

Ann Reed (OR)

Carlos's comment completely misses the point.

By phrasing the element as children's material circulation, it puts one in mind of Easy, Juvie fiction and Juvie non-fiction material types. So where to count the circulation of YA material type? I was including it with children a long time ago, but during the discussion where we broke out YA programming and tried to nail jello to a tree vis a vis YA circulation it came out that most states count YA material circ with adult or total circ.

Since I started to conform to the norm, there has been an outcry from YA librarians about how YA materials circ belongs with children's materials circ, except that then children's materials circ should probably be renamed to youth materials circ.

To keep the ravening mob off my doorstep, I told them that I'd look into it and maybe suggest some rewording on this in the coming winter.

Book Clubs

May 6, 2013

Question

Robert Jones (IL)

Good Morning: Quick question....is a book club considered a program? I say no but the library director's argument is the book discussion group "engages patrons in using our resources in order to complete the club". I'm still not buying it so thought I'd turn to you all for some feedback. If book clubs do not count as a program, can we look at including this exclusion in the definition for [PLSC 600](#)?

Thanks for your help!

SDC Comments

Susan Mark (WY)

Are you talking a book club not organized by the library -- like a private thing where they check out a book club kit? Or a group that books a room, but the library's not involved?

If the library organizes it and they meet at the library I'd say yes, it's a program. Can you give more details so we know exactly what's involved?

I'd also count online book clubs if it's a program set up by the library. Each online book club program = one program.

Laura Stone (AZ)

What's your thinking on why a book club wouldn't be a program? Would it matter if it has "professional" facilitation? Is it a community group just using the space? Or is the library hosting, publicizing, etc.?

Robert Jones (IL)

Thanks for all of the responses. The book club does not meet at the library. I'm not clear on whether or not the library hosts the book club or if this is something the director may be doing on her own (it's a small public library). But I got enough from you all to better respond to her question!!

Susan Mark (WY)

We have Humanities Council book clubs where it's entirely possible the library could get the grant and arrange the materials, but not meet at the library. If it's facilitated by someone like that, but not physically at the library, I'd count it. I think there just has to be some library involvement and support beyond having the books.

Of course, this would not count if it were merely the director's personal book group.

Ruth Hyatt (AR)

I do let them count book clubs as a program. Any event that requires library resources, and staff time (I am assuming that a staff person or library volunteer is running the book club sessions) to prepare and perform is counted as a library program.

I do not let them count other groups or organizations using library space for an independent event. So, if an independent group is using library space for their book club meetings but do not require assistance or leadership from library staff/volunteers or library materials in the form of sets purchased for book club use, *that* group would not be counted as a library program.

We are thinking of adding a question about library meeting/program space used for non-library programs or meetings to our survey.

Scott Dermont (IA)

We have a question on our survey asking for meeting room use. We count the number of times the rooms are used, but not attendance.

Jamie McCanless (WI)

Ditto Susan's response. Provided that the library actually sponsors/organizes/conducts a book club, we would count it as a program. If the library's only involvement is to engage patrons in using library resources, the book club would not be a program.

Are exhibits counted as programs?

May 17, 2013

Question

Nicolle Steffen (CO)

To count or not to count the art exhibits? Your feedback appreciated!

Question from a public library in Colorado:

I'm working with a team at the public library in Pueblo to streamline our statistical gathering processes, and we've come up with a question: Are visits to exhibits analogous to attendees at a program like storytime? We've got two exhibit spaces in two locations here and have considered and counted exhibit visits as program attendance in the past. We're not sure if this was correct.

*I've found the IMLS documentation for the 2010 survey online (<http://drdata.lrs.org/PublicLibs/Documentation/pls2010doc.pdf>), which says, "A **program** is any planned event which introduces the group attending to any of the broad range of library services or activities or which directly provides information to participants. Programs may cover use of the library, library services, or library tours. Programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need." It doesn't list 'exhibit' or 'art display' or similar in the examples... which may answer my question.*

My question: Are the exhibits curated by the library? Sometimes the spaces will be displays of teen art or traveling exhibits selected, displayed, and documented and shared by librarians, other times it will be artists who request their work be shown or will be contacted by the library but who have more control over things.

SDC Comments

Susan Mark (WY)

How are they counting attendees?

I had a library that counted everyone who walked through the door while the exhibit was up as an attendee. I said no. If they have a defined space and a way to count accurately, that might change the equation.

I would be inclined in general to say no, but would love to hear both sides on this one.

Lisa Hickle (OH)

I agree with Susan. I tell them they can count attendees if they have a designated area or if there are programs held during their exhibit. ...i.e. opening program, speaker, etc., but I am interested to hear what others are doing.

Michele Balliet Unrath (ND)

We should keep in mind that the definition regarding program attendance also states "Do not count attendance at library activities that are delivered on a one-to-one basis" ...so I would agree with Susan on this issue.

Michael Golrick (LA)

I would note that if the exhibit is in the area where patron visits are already counted, then people visited are already in the door count.

For me a key part is this:

A program is any planned event which introduces the group attending...

I infer that there is some kind of presentation, and that the presentation is to a group. So a group tour of the exhibit would be a program, self-guided (or just folks looking) is not a program.

That is my 2 cents....Remember, free advice is worth exactly what you pay for it (well, sometimes)!

Consortium Purchasing

May 21, 2013

Question

Bruce Pomerantz (MN)

Libraries count the number of online databases available to the public, splitting them up by funding source, local/cooperative and State.

The instructions for e-books, downloadable audios and downloadable videos state to report the number of items the library has selected as part of the collection. If a cooperative purchases Overdrive and allots a certain number to each member library, that to me is a selection. However, wouldn't you know it but one cooperative did not provide its members the necessary numbers because we do not have similar language like we have with databases.

As far as I'm concerned, it's always what's available to a library's users at the library or library website, not who funds gets exclusive counting privileges. Do you think we need to put in similar funding source divisions as we do with databases?

Also, I know for 2013, several consortiums have licensed Zinio for its members. I have been chastised locally for thinking of Zinio as a database.

- (A) Does the same general rule apply: In counting periodical subscriptions, count what's available at the library or from its website.
- (B) Do we need to distinguish between print and e-periodical subscriptions?
- (C) Does the number of periodicals available translate into a periodical subscription even if no one from a library downloads even one issue of a specific periodical?
- (D) Do we count these downloads as circulation?

My vote: Yes to all four.

SDC Comments

Laura Stone (AZ)

Bruce - Yes, I agree all the way around.
Especially C. If the library buys a book, and no one checks it out, it still fell in the forest.

Scott Dermont (IA)

Yes, I agree with Laura. Circulation should not be used to determine an item's inclusion in the collection. If it doesn't check out, that is bad collection development, but should still be counted.

Need guidance on Mango languages and school/public library combinations

June 3, 2013

Question

Tracy Cook (MT State Library staff member) – forwarded by Colleen Hamer (MT)

A task force made up of Montana State Library staff and Montana librarians are looking at the public library statistics that we collect in Montana. We know we need to stay within federal guidelines so we have a couple of questions for you.

1. Some libraries have a subscription to Mango languages. Is that a database? If not what is it? We also have a statewide subscription to Homework Montana which is an online tutoring service. Is that a database? Both of these are more like an online service so we aren't sure where they should be reported.

2. We have a lot of school/public library combinations in Montana.

Should these libraries report the school's funding and collections with their public library statistics? Some libraries are integrated and aren't sure if they should be trying to collect the school's contribution to the funding of the library. On the one hand it is a part of the support the library receives, but on the other hand it makes it hard for them to compare themselves to public libraries of a similar size.

-Thanks for your help

SDC Comments

Michael Golrick (LA)

I am not sure I can answer #2 with any authority, without more meditation on the topic.

I will unequivocally state that in Louisiana we count both Mango and Tutor as databases, and therefore the use as database use. Mango was added to the statewide list in the past year, and before that it counted as a locally funded database. Tutor has been provided statewide for a number of years. (For us, the good news is that *we* keep the stats on the statewide databases!)

Stacey Malek (TX)

Texas has Learning Express as part of our state databases now, so like Michael, we keep the stats on that. Mango counted as database.

Texas has several public/school combos. We tell these libraries to provide us only those stats that pertain to the "public" side of the library. No, it's not always easy and I'm never sure it's being done correctly (of course, I could say that about most of the data we collect), but that's what we tell them to do. The ISD can usually break out the financial part for them.

Hope that helps.

Ann Reed (OR)

1. I'm still debating on Mango. On tutoring, I'd go with how its mostly used. IF the live help portion is the attraction, then how is it different than reference chat, which isn't a collection item, it's a service.

2. The ultimate question for the pl stats is - what does it take to run a library for what outputs. When public patrons come to use a school/public library, they can use the books and catalog, even if some of that is covered by the school. And vice versa. It makes no sense to deduct the cost of cash and in-kind school support because that is truly what it takes to offer library service. And no, they aren't and never will be at all comparable to a public library. They will always have visits and children's programs through the roof. The best they can do is have your help and compare themselves to other school/public libraries.

Programming and Training

June 12, 2013

Question

Kathy Sheppard (SC)

Hi all, a quick question –

The word “training” does not occur in the definition of “Library Programs.” Do you all include all kinds of public training, including technology and Internet training, in your count of public programming? Do you break training out separately as a local count?

Does anyone feel that it would be helpful to include a definition for “training” at the SDC meeting?

SDC Comments

Bruce Pomerantz (MN)

To me, instruction is counted as program because instruction falls within the parameters of introducing “the group attending to any of the broad range of library services. . .or provides information to participants.”

Joyce Chapman (NC)

We tell the libraries to include training programming (like group training on technology) in their program counts. Where they get confused is with one-on-one assistance with technology, which doesn't seem to necessarily fit into the reference definition but also has nowhere else to be counted. This year we're introducing some new questions: program and attendance counts specifically on 1. Tech/computing, 2. Jobs/careers; and one-on-one assistance on 1. Tech/computer, 2. Jobs/careers. Those are some of the data points we need to be able to talk about for advocacy. A couple of our libraries independently collect even more categorical data for programs or one-on-one assistance, homework assistance is the one I can think of off the top of my head.

Diana Very (GA)

In Georgia, we count all training (computer, financial, literacy, etc) at the local libraries as programming as well as all the children's storytime, etc. Training for staff development would not be considered a library program and is not included in the count.

Laura Stone (AZ)

Ditto for Arizona. I think training is a subset of programming.

Michael Golrick (LA)

I would count tech training for groups as programs.

Actually, **I** think it is pretty clear that one-on-one technology training is reference. I work the Reference Desk every day (see signature file...), and am just back from it. Re-read the definition: A reference transaction is an information contact which involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. 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. The request may come in person, by phone, by fax, or by mail, electronic mail, or through live or networked electronic reference service from an adult, a young adult, or a child.

It is pretty clear to me that “instruction in the use of one or more information sources by a member of the library staff” includes computer training.

If **we** want, we can certainly make the definition even more explicit, and I would support that (but I am not officially proposing it, either).

Roberta DeBuff (NV)

As someone who came from a public library adult services desk (in my past life, not so long ago), I think I would agree with this statement and concur that the one-on-one training would be best counted as a reference transaction. Group training, which is scheduled, would be, in my opinion and perception of the definitions, would be counted as a program.

The two cents of a novice...

Joyce Chapman (NC)

Maybe we could modify the official definition so that it's clear the one-on-one tech goes in reference (and anything else that goes in there that people are confused about). I suspect that most of my libraries count this in reference now, we are still going to start asking them to count it as a separate category as well though, since there's such a demand for this info on the advocacy side.

Kathy Sheppard (SC)

We count group training and group programming separately (# sessions and # participants) so we can reflect training activity separately. This lets us know which libraries are comfortable offering formal instruction to the public, and how much of this is going on. But I am having a little difficulty with my folks sometimes not differentiating between “training” and “programs” - some programs are kinda like training, and some training is kinda like a program. Making a chart of examples this year and hopefully that will help.

They have less difficulty with the idea of one-on-one technology training counted as reference so we're ok there. But it would be good to know how often "reference" turns into "training" in these one-on-one interactions, because this would help us gauge if positive change is taking place in the population. I am just not sure how I could get all of them to define and to report these kinds of transactions separately. Thanks to everyone for your input!

Eleanor Bernau (NM)

Ditto for New Mexico.

Robert Jones (IL)

Same for Illinois.

502 Registered Users

June 20, 2013

Question

Joyce Chapman (NC)

The definition says “files should have been purged within the past three (3) years.” What’s the definition of “purged”? You get rid of everyone who... what? Hasn’t used the card in X amount of time? What is X?

SDC Comments

Michael Golrick (LA)

I interpret that somewhat loosely (and wish that more of my libraries were more diligent). As a director, we used to purge those who had no activity over the past three years and who did not have any outstanding items or fines. One library (in Wisconsin), had a one year renewal period for library cards. That partly related to the county reimbursement/aid formula. Staff at that library had plat books behind the desk to double check addresses and coded them in the proper community. Those patron records were wonderfully up to date.

Diana Very (GA)

Many libraries flag patrons who have not had their home addresses verified within a specific amount of time. Those patrons who have not visited the library within that specific time to validate their home address will be taken out of the active patron list. This question suggests that the patron list would be purged of inactive patrons within a three year timeframe. Whether an inactive list is kept by the library information system would be determined by the library system. Some libraries may destroy library records for a patron that has not visited within a specific time period. That's my view of the question.

Public Internet Computer Count

June 25, 2013

Question

Bruce Pomerantz (MN)

The [definition](#) is:

The number of the library's Internet computers (personal computers and laptops), whether purchased or leased, and either used exclusively or by necessity shared with the public, to connect to the Internet in the library.

The actual situation: Two computers in a children's area are connected but can access only staff-selected sites. They cannot be altered if a parent in the area wanted to use them for general use.

1. Question: Should they be counted?

The hypothetical questions:

(2) Should something like the X-box be counted as a public internet computer?

(3) Should tablets that are lent out for use be counted as public internet computers?

(4) Should we broaden the definition to "whatever connects to the Internet and is lent by the library" because we will never be ahead of the curve on the technology is we attempt to name what should be counted?

SDC Comments

Michael Golrick (LA)

Your questions, and my recent review, make me think that we may want to re-visit the definition. I will try to remember to raise the question in a couple of statistics related meetings I will attend over the next week at ALA.

Oh, and I suspect the deafening silence is related to two items (well, mine was): completion of data submission – Group 2 is large; and preparation for ALA with the added complication for many of us that legislatures are adjourning and the new budget year is next week!

Rob Geiszler (VT)

I think your inquiry subsumes a larger question of what information we're trying to capture. Traditionally, we were envisioning someone sitting at a library machine doing "research," so we were looking at an extension of reference services. This quickly morphed, as it became clear that the big uses of the computers were as some form of communication: email and instant messaging. (Who's old enough to remember "chat rooms?" AIM?) Next came the games, and then MySpace (remember that?) and ultimately Facebook, to say nothing of all the other streaming services. So, the paradigm has really changed, yes? Of course, right along with these substantive changes came what I'll categorize as

procedural changes: wireless, teleconferencing, mobile devices of all sorts and whatever the future holds.

What then, do you want to count? Do we stick with the traditional notion of someone sitting at a library “device,” or are we more interested in the use of the library’s telecommunications services? Certainly, it’s easier, technologically, to trap the more traditional uses. To go beyond this means accessing router logs in one form or another, and even that is pretty murky, since, even if we’re pretty sophisticated, that will only give us a count of the sessions particular IPs have initiated, not really the number of people, in which we’re ultimately interested .

The next level of inquiry, then, extends to the question of how heavy a burden do we place on our libraries? It’s easy enough to count the number of sign-ins we see on the paper sheets at the end of the day. (Still the means of counting in rural or small town libraries.) If the library is more sophisticated, of course that process is automated. However, if we go much beyond that, we’re going to have to install some pretty sophisticated software, and possibly some hardware.

So, you’ve posed a question that entails a greater complexity than is immediately apparent on first blush. I’d like to hear other’s thoughts on this, especially as they relate to solutions for data collection, if we want to expand our definition.

Good question. Certainly had me thinking in a little larger context.

Questions on PlayAways, Career Fairs, and Fair Booths

July 18, 2013

Question

Joyce Chapman (NC)

I gave a webinar yesterday for all my libraries to prepare them for this year's survey, which has just opened. It's my first year administering the survey. I got three questions that I wasn't sure of the best answer to.

First, NC is counting two different types of audio circulation: downloadables and stuff on physical media like CDs. I was asked where to count circulation for audiobooks checked out on PlayAways. Now, I've never worked in a public library and my understanding of what a PlayAway is could be wrong. But my instinct was to count it as a downloadable because it's a digital file that library staff downloaded for a patron onto a device, which they then lent out. The person asking thought it would count in the category of analog audio circulation (maybe not the best word... audio on CDs or tapes), because it's on a physical device. Am I right that the audio itself is purchased and uploaded on to these devices?

Career fairs: if a library hosts a career fair, is this counted as a program and can attendance be counted? If a library has a booth at someone else's career fair, can this be counted as a program and can everyone who comes and talks to them be counted as attendees? Same question for county fairs, if we have a booth at a county fair, can that be counted for a program?

SDC Comments

Scott Dermont (IA)

I would actually count a Playaway as a physical item not as a downloadable. You purchase the item as a unit, you don't download to it, it already has the content loaded on the device when you purchase it. It is a single use device that can only ever play the book that has been loaded onto it. Actually, even if you were downloading to it, I would still call the checkout of the player as a physical checkout rather than downloadable. So, if the library loads up a Nook, and checks it out, I call that a physical circulation. If a patron downloads an audiobook for e-book from a service like Overdrive, I call that a downloadable circ. At least in my mind, those are two very different transactions.

I have been counting attendance at fair booths like a program only if they are doing some kind of programming. I don't see the act of handing out a flyer as a program. But I do see it as a program if they are doing a story time, or something like that. In either case, I think they have to be careful to only count attendance at the booth and not at the entire fair.

I would count the career fair held at the library as a program. To me that is more cut and dried than a booth at the state fair.

Nicolle Steffen (CO)

I agree with Scott and would offer similar advise to Colorado's library administrators.

Ann Reed (OR)

I would say the caveat to the career fair, and programming at the library, is - did the library help sponsor the event? If all the work was done by someone else who just happened to use their meeting room, then it wouldn't count.

Scott Dermont (IA)

Yes, I would definitely agree with Ann here. The library still needs to sponsor the career fair in some way beyond just letting them use a room. I read the word "host" in Joyce's statement and assumed "sponsor." But it really needs to be more than just the use of their space.

Where are AWE uses counted?

August 5, 2013

Question

Joyce Chapman (NC)

Do you all have your libraries report uses of AWE stations? If so, where do they report this? Since they aren't internet-enabled they can't be counted with the other computer uses. It would be a shame not to capture this statewide somewhere even if it doesn't make it to a national stat. We have a technology lending circulation question that's new this year and I was wondering if I should have folks include AWE sessions there, since we told them to count in-library circulation of other technology lending. What's the difference between giving someone a laptop with specific software to use in-house and giving them access to a stationary AWE machine with special software to use in-house?

Thanks for your wisdom.

See also: Early Literacy Station (ELS) from AWE (2/14/13)

August 14, 2013

Joyce Chapman (NC)

I didn't get any responses to this. I checked in the archives and saw that Nicholle asked about whether folks tracked these as internet computers back in February. Everyone said no, don't track them as internet computers or computer uses. However, no one mentioned whether they track the uses anywhere else locally. That's what I'm interested in knowing. I don't think NC has any local questions where they can be reported unless I shove them into Technology Lending (where I'm not sure they belong). They libraries want to be able to report it somewhere though.

Thanks for your wisdom.

SDC Comments:

Michael Golrick (LA)

You know....I noticed that there were no responses in my mailbox and thought that folks replied to you. In Louisiana, we ask for computers connected to the internet, and computers not connected (and we also ask for each of those categories for staff and for public computers), so I do have a place to count them. However, I don't ***report*** them to Census/IMLS because there is not a place to do so. For most libraries, I think their use is counted in the computer use numbers, but I am thinking for many it is simply unreported.

Hope this helps.

Bruce Pomerantz (MN)

I didn't respond because, since no one locally has asked about AWE, I assume that no library has any or if they do, they've made their own decision and I'm blissfully unaware of the situation(aka ignorant).

Laura Stone (AZ)

We (generic, meaning those of us who keep state and national numbers) don't count everything. We don't count stuffed animals in the children's section, and we don't count inhouse use of reference materials. We don't count the books that the patrons who spend their days at the library (but have no borrowing privileges) read. We don't count the number of people who peruse the job help bulletin board. We don't count parking spots, ask how close the nearest bus stop is to the library, or how many cups of coffee the library café sells.

I hope that the local library is counting a lot of these things – the numbers should inform staffing, purchasing and marketing decisions. On a state and national level, we just have to be a lot more selective. I think it's okay to leave the AWE station usage to the local library.

Eleanor Bernau (NM)

New Mexico counts in a way that's very similar to Louisiana's, e.g. computers connected to the internet and computer use sessions.

Joyce Chapman (NC)

Our new governor is very interested in early childhood education and economic development and wants data on how each branch of government is contributing to these things. Once we start poking around for data that shows how our libraries intersect with those topics, we suddenly realize there are a number of areas in which our libraries are actively working but we are not collecting any data about it. Not having data on it limits our ability to function as an advocate for our libraries up at the top. While we collect statewide data on children's programming, circ, and summer reading program stats, we have no data at our fingertips about the number of children's librarians, every child ready to read efforts, things like the AWE stations, etc. Not to mention economic impact data. That's one reason NC revamped our local questions on the survey this year to include stuff like offering and attendance counts for programs related to workforce development and technology skills. We do have a few libraries that were collecting that information already, and while that's helpful to them on a local advocacy level it doesn't help the State Library advocate for public libraries at the state level. And they want us to do that! So I've found they're happy to have more questions added to the survey if it's going to help demonstrate the value of libraries to the legislature. The State Library has also funded a number of AWE station purchases for libraries over the years with LSTA funds, so we are invested in knowing more about their use for that reason.

While I see what you're saying about not counting everything at a state level, collecting statewide data for some of the things that libraries might be collecting locally ends up being very helpful to the

individual libraries. Data needs context to have meaning. Instead of having to present their data totally without context to their funders or boards, the State Library makes comparative data available to individual libraries. So instead of being limited to saying “we don’t have any AWE machines and we’d like one” they could argue “we’re the only library in the state that doesn’t have at least one AWE computer” or “those libraries with AWE stations average X number of uses per machine annually; this is a highly used service that the children of our county are missing out on.” I recently helped a library argue to avoid staff cuts by preparing some comparative data from the PLS dataset that showed how far behind peer group averages the library already lagged in per capita staffing, salaries, etc. She would not have been able to do that if she only had her own library’s data without a higher level organization collecting and making available statewide /national datasets.

I’m kind of veering off the email thread here now, but as part of a new data website we just launched for our public libraries (<http://plstats.nclive.org>) we actually created some “data dashboards” with the goal of helping the libraries use their data to make these kind of contextualized arguments. The dashboards give them performance indicators by library and allow them to choose a comparison group (we only have two at the moment but I hope to make more as soon as I have time). Then the dashboard shows them the average for their comparison group, and also their own library’s difference from that group mean. Same with census data about their community. I think library systems that encompass more than one county in particular have a tough time using demographic and community data from the census because they don’t have the time or knowledge to compile it into single numbers for their multi-county legal service areas, so our dashboards do that for them (as long as I set up my math equations up right... we’ll probably see the error notifications come rolling in after we present the dashboards to our libraries next week!) This is the link if anyone wants to take a look: <http://plstats.nclive.org/dashboard.php>.

Diana Very (GA)

I like your Dashboard comparison tool. Would be good for those who need to pull up comparisons for their board and commission meetings. There must be a trend going around about pre-school education and early literacy skills. We're working on it Georgia. Keep me in the loop when you all come up evaluation measures for those programs.

Katrice Stewart (FL)

I too love your dashboard. Seems like there is definitely a trend. Our Youth Consultant is also targeting early literacy through some efforts she’s beginning.

Jamie McCanless (WI)

My answer is essentially “us too.” We don’t count AWE stations as either public computers or public Internet computers in Wisconsin. We also don’t (intentionally) count uses of the AWE stations, either separately or as Internet computer uses. That said, I’ve found one case where a new library director’s 2012 report showed substantially fewer Internet computer uses. It turns out that the former director included a large number of AWE uses in many annual reports. We don’t collect technology lending data.

July 19, 2016

Robert Jones (IL)

Same here Bruce.

Where to count MLS degrees in non-Librarian positions?

August 8, 2013

Question

Joyce Chapman (NC)

If people with ALA accredited MLS are working in non-Librarian positions, are they counted as 250 or 252? I can't tell from the WebPLUS v1.7.
Thanks!

SDC Comments

Susan Mark (WY)

252 is my understanding.

Michael Golrick (LA)

At the danger of sounding old <gasp>, we had this discussion before you joined this group. For this data element, the degree is tied to the requirements of the position, not to the person occupying it. Therefore, if the ***position*** requires the ALA-MLS the individual is counted in 250, if not they are counted in 252.

[I went and searched the PLSC wiki, and found this discussion some of which even pre-dates ***my*** arrival as an SDC....

Look here: <http://plsc.pbworks.com/w/page/7422663/Total%20Librarians%20vs%20Total%20MLS>

I think it must have also been discussed (again) at the 2009 meeting which would have been my first. But I can use my "mad reference skillz" to find this stuff!]

Good luck.

Joyce Chapman (NC)

Thanks for your answers. The wording of the questions/definitions for Paid Staff seems awfully misleading as is. Shouldn't we modify it to clarify that we're counting positions and classifications, not actual people? The questions currently state that we want counts of "librarians" and "persons" and "employees". It would never cross my mind to report based on position classifications instead of staff's actual credentials if I were filling the survey out with these definitions.

Colleen Hamer (MT)

I agree that the data element definitions by themselves could be misleading. As I am a new SDC, I've reviewed closely the definitions and the blog histories, and I've found that often the leading paragraphs for each category contain vital information... so much so, I've incorporated it in each definition for my own use. E.g. below the category paragraph clarifies the idea of positions, the idea that filled or vacant positions are reportable, and the idea of FTE (NOT a count of positions), etc

Frank Nelson (ID)

The origin of this thread is lost in time. Not chiseled in stone mind you, but it was mostly first put down in Linear B.

Joyce Chapman (NC)

Yes, that's a good point but I think if we're asking people to count positions then we need to say so everywhere instead of telling them to count "positions" in the category description and then telling them to count "persons/librarians/employees" in the question definition. We're begging to be handed incorrect information, as it is. And causing extra confusion for the libraries, which is the last thing we want to do.

If the questions require data on positions and their classifications instead of data on actual staff members, why haven't we reworded all four question definitions in the Paid Staff section so that they indicate what libraries are actually supposed to be counting? Can we do this?

Consortial Circulation

August 13, 2013

Question

Robert Jones (IL)

Good Morning SDCs – quick question....do we count items that circulate through vendors such as Overdrive?

SDC Comments

Susan Mark (WY)

I think in theory yes in practice, it's iffy. Pretty much all of our libraries' e-circ goes through the state consortium. I've checked with our tech people, and there's no way to split it out by library. So while in principle, I support the added e-circ element, in practice our libraries have no way to report it.

Bruce Pomerantz (MN)

I wonder if identifying the circulation source is dependent on the licensing agreement. We have numerous Overdrive consortial arrangements and the individual libraries receive the circulation download numbers for the Minnesota reports.

Robert Jones (IL)

Well – I got a librarian who is reporting E-Circ (for her patrons) from Overdrive. I'm stomped on whether to include it or not because most of the libraries here in Illinois don't!

Diana Very (GA)

Yes, but as Susan said, Easier said than done.

Any library that has OverDrive has to pay for access to the e-books for their patrons, so the library should count all circulation of the e-books.

Robert Jones (IL)

I'll start spreading the news re: counting E-Circ for Overdrive, etc.. Been doing this for two years and still learning as I go..... :)

Scott Dermont (IA)

Yep, our Overdrive consortia also get library specific circ.

Susan Mark (WY)

Maybe it depends on the vendor. We have 3M Cloud eBooks and OneClick Digital audiobooks, and can't get library by library stats for either. We have Freeding, but it's my understanding that's being treated as a database, so I am doing so. Even if it were considered ebooks, all we could get would be number of tokens used, not books downloaded.

I don't even wanna think about Zinio....

I propose a trophy for the person who figures out e-resources: a plaque made of tree bark with a hammer, nail and box of jello attached. Your choice what flavor. If life were fair, the trophy would come with a week in the Bahamas.

Ann Reed (OR)

We report it – for consortia, I tell them to distribute circ for e-items proportionally based on circ of other items.

Frank Nelson (ID)

This recalls the long running issue of the OPAC requirement for all things digital. Without some kind of "loading chute" we will never have a real count. Sorry, I was at a rodeo this weekend.

Bob Wetherall (DE)

Delaware is fortunate. All e-books and e-audiobooks are licensed by the Division of Libraries (State Library) from OverDrive, and we are treated as a single library system, not as a consortium. The individual libraries are considered branches. So it's easy to get circulation stats from the OverDrive reports site.

Susan Mark (WY)

I will happily use Ann's method at the state level, if the consensus is that it's OK to do it that way. Looking at our overall stats, we're getting increasing 3M and OneClick usage. I'd love to capture that. Although ... our consortium is multi-type. Not sure how I'd handle the community colleges in the mix.

Joyce Chapman (NC)

We count every library's collection and circ from overdrive, zinio, and whatever else they have. If they have their own accounts they report it to us. If they are in one of our consortia, the consortial manager reports everyone's collection and circ numbers to me and I preload it in each library's survey for them. We also count ebooks, evideo, and eaudio available through our statewide consortium. The consortium can give me the collection and circ numbers for every library, so I preload all of that for them in their survey too.

Eleanor Bernau (NM)

New Mexico reports similar to Oregon, using the percentage of consortia purchases. For instance, one consortium has 4 members and they report 40%/20%/20%/20% based on spending and what each library acquires.

Laura Stone (AZ)

Overdrive breaks out circ for the libraries in the Greater Phoenix Digital Library, so it can be done.

Robert Jones (IL)

Thanks for all of the feedback!

Questions on Operating Revenue

September 9, 2013

Question

Joyce Chapman (NC)

I have two questions from directors. One received two LSTA grants via the State Library last year but they went to capital projects: one was an RFID project and one was for migrating to a new ILS. She wanted to know whether the money should be included in 302, Federal Government Revenue, or 402, Federal Government Capital Revenue. I thought they should be 402 (at least the directions seem to clearly state that they should be) but she thought they should be 302. I'm still foggy on what capital projects and revenue even are!

Second, another director said the town pays the library's rent for them and the money never passes through the library. She wanted to know if in her 300 Local Revenue she reports only money that passes through the library, or does she do it like on the Maintenance of Effort calculation where that rental income counts toward her operating revenue. She has also been reporting \$15,000 that she gets every year from the local ABC board in question 300 because it's county money. But that money is not counted in her annual Maintenance of Effort on State Aid records. What do you all think?

Thanks!

SDC Comments

Susan Mark (WY)

Here's how I would interpret it.

Federal money is federal money, even if it changes hands. In the first question, it's a 402. As for what constitutes a capital project, I would think both these would qualify under the definition "(g) other one-time major projects." Both sound major to me, both sound one-time. Some might dispute this on the ILS, but I'd definitely consider RFID conversion a capital project. What we do not want counted in capital are the day to day operations and recurring maintenance.

The second question to me is a bit fuzzier in my mind. I have told my libraries that if it doesn't go through their budget, it's not income. So the rent would not count in my book. I'm not sure what others are doing on this. I might be doing it wrong. We don't do state aid that need proof of maintenance of effort, so don't have any thoughts on that part.

Diana Very (GA)

In Georgia, we consider all funds that go to library operations as local government funding. That would include rent paid by the city, janitorial services paid by the local government, utility bills, staff salaries, etc. If the local government can pull the amount from their accounting system of the expense used for

the library, (usually in a cost center in their accounting system), then it's counted as on-behalf local funding and added to the total of local revenues and local expenditures.

We have a larger population and larger funding amounts to consider than Wyoming. In FY12 I would have not documented over \$31 million if I didn't count on-behalf local funds.

Thanks,

Michael Golrick (LA)

I agree with Susan on the first question. There is no doubt in my mind that those two LSTA projects are capital projects.

For the second question, I would note that the instructions are pretty clear for 300: "Do not include the value of any contributed or in-kind services..." That to me is an in-kind service. Now how you handle this (or the other, for that matter) for your state reports, is entirely up to your local practice, and I would simply urge you to be as consistent as you can both for a library over time, and among the different libraries. Let me also note, that as a public library director I struggled with this when the library I ran was unable to answer questions about the benefit costs. The city was self-insured, and even the city budget did not include any provision for individual departments to report expenses for benefits. It was a mixed blessing, which I can explain at further length if needed. At least one of my libraries has this issue.

Colleen Hamer (MT)

I agree with Susan and Michael on the capital projects.

On reporting rent/benefits paid thru those indirect methods mentioned, I think reviewing the below highlighted elements of the operating revenue and expenditures definitions indicates that the revenue and expenditure should be reported if the information is available.

OPERATING REVENUE

Report revenue used for operating expenditures as defined below

OPERATING EXPENDITURES

Operating expenditures are the current and recurrent costs necessary to support the provision of library services. Significant costs, especially benefits and salaries, that are paid by other taxing agencies (government agencies with the authority to levy taxes) "on behalf of" the library may be included if the information is available to the reporting agency.

Diana Very (GA)

Colleen,

Thanks for the definition of "on-behalf".

Rob Geiszler (VT)

D'accord, with respect to question 1.

However, with respect to #2, I tend to disagree with Michael. I think when we collect this information, we're trying to determine how much it costs to run a public library. If cash is being paid out by the library, or on behalf of the library, I think it's legitimate to count it on the income side. We have several towns that pay the librarians directly out of town funds. These don't flow through the "library" account. I have asked those librarians to be sure to contact the municipality and retrieve these amounts and count them on both the expense and revenue side. The source of the funds doesn't make much difference, does it? If these weren't coming out of the town or city coffers, they'd be coming from library fund directly but, the town would have had to have deposited the money in the account. We've just eliminated a step. But ... somehow they need to be accounted for, if we want to have a complete picture. The rental payments sound like this to me.

I draw the line at something like snowplowing, or maintenance, where there's no cash trail, though. I'm not willing to let someone take a guess at how much the snowplowing or painting done by town employees is worth. That's in-kind, and if there's no invoice that's marked "paid" or "forgiven," it doesn't exist.

No?

Jamie McCanless (WI)

Here in Wisconsin:

- All LSTA grant funds received by individual public libraries are reported as 302 federal revenue and all capital expenditures of federal funds are reported as 402 federal capital revenue/expenditure, so our libraries would report the funds you describe in both places.
 - If a payment is made on behalf of our libraries without being sent to the library itself, it is not included in the library's annual report. Rent paid to a property owner by the municipality would not be reported as income by our libraries.
 - When we had Maintenance of Effort, it applied to operating expenditures from municipal sources only (not county, state, federal, or funds used for capital). County money received by a library would not have been included in our MOE calculations.
-

Robert Jones (IL)

Agreed on the federal money (402). However, I do tell library directors when they call saying "I don't see any money from local government" though they know what is budgeted for the library and what is spent (by their local government) to include it as local government income and expenditures on their annual report.

Jamie McCanless (WI)

This discussion appears to have ended, but I misspoke and want to correct myself.

Here in Wisconsin:

- **Regardless of program source, income for capital expenditures is not reported as operating revenue. In Wisconsin, the LSTA funds you describe would only be reported as 402 federal capital revenue/expenditure. All LSTA grant funds received by individual public libraries are reported as 302 federal revenue and all capital expenditures of federal funds are reported as 402 federal capital revenue/expenditure, so our libraries would report the funds you describe in both places.**
- **Our report instructions read “Library operating costs paid directly by the municipality may be included as library revenue and expenditures; however, the library must be able to document the expenditure of these funds for library purposes.” So, provided that the Wisconsin library indicates the rent amount separately, rent paid by the municipality to an independent third party on its behalf could be reported as operating revenue. If a payment is made on behalf of our libraries without being sent to the library itself, it is not included in the library’s annual report. Rent paid to a property owner by the municipality would not be reported as income by our libraries.**

Question about Temporary Locations

September 11, 2013

Question

Scott Dermont (IA)

I have a library that is expanding its current location, but during the construction process they have moved to a temporary facility. They still have the same mailing address, but they do have a new physical location. I've told them to change their physical address until they move back to the permanent location. I have also asked them to report their temporary square footage. Does that coincide with what other states do in this situation?

Thank you for the help.

SDC Comments

Michael Golrick (LA)

That is what I have done. There are codes for that (and of course, I had just put my book away....)

Look at page 123.

Eleanor Bernau (NM)

Hi,

A NM library had a similar, but not exactly the same, situation. The children's section was moved to a temporary, separate building while renovation/expansion was going on throughout the library.

For future reference, here's the advice I received and followed.

So, it sounds like this library has essentially remained open during their renovation, at least in part by moving their children's collection to an adjacent building. ...

...If they are not going to be completely closed for all of a year, and their "move" was temporary and minimal (at least in terms of distance), then it sounds like you would go through a terrific amount of work to make all of these changes for an event that may last at most a year, and then return everything to where it was. Since the net effect is zero, I'm not sure what benefit would be gained from that effort.

This solution worked perfectly for the NM situation and may be of assistance to others.

Scott Dermont (IA)

Hi Eleanor,

This is a very different situation for us. The library in question has been demolished down to the girders and will be rebuilt on the current site. In the meantime, the entire library, collection and all, has been moved to an old storefront. It will take at least two years for the new library to be completed. They will then move everything back to the permanent location.

Frank Nelson (ID)

In my opinion, 2 years is not temporary.

Darla Gunning (CA)

This happens QUITE often in California and yes, the way you describe is what we try to do!

Katrice Stewart (FL)

Although not quite as often, this too is how we have handled 😊

Robert Jones (IL)

Yes sir.

Carole Suizui (HI)

When the old Manoa Public Library building was demolished to make way for a bigger library in the same location, the library temporarily moved into two portable classrooms across the street at Noelani Elementary School. They had a new physical address and the square footage was that of the combined square footage of the 2 portable classrooms. They have since moved back across the street into their new building.

Scott Dermont (IA)

Thanks to everyone for your quick answers. I felt like I was doing the right thing, but I just wanted to make sure. This group is such a great resource!

E-magazine Count

September 12, 2013

Question

Bruce Pomerantz (MN)

Has anyone decided for their own state to collect e-magazine subscriptions (e.g. Zinio selection, Wall Street Journal, NY Times) as a counterpart to print periodicals? If so, would you please share the definition you created?

Also, is anyone tallying the downloads as circulation? If so, is it being entered in your annual reports and if yes, where?

I didn't find anything the Data Element Definitions: Questions, Comments Feedback. . . If this has been discussed before please point me the way.

Thanks.

SDC Comments

Joyce Chapman (NC)

Yes, we added both the count and the circulation as local questions this year. We just copied all the verbiage from some other IMLS question for the e-periodicals subscriptions. We were planning to include the e-periodicals circulations in the new IMLS question 552 Circulation of Electronic Materials along with e-books and e-audio, and we are not counting e-periodicals in databases. We forgot to add a downloadable video circls question this year (sadly) so it will have to wait until next year to join #552, since our survey is due today!

Here are our new questions:

523. E-periodicals subscriptions

Report the number of e-periodical subscriptions, including duplicates, for all outlets. If data on the number of units subscribed to is not available, the number of titles may be counted. E-periodicals packaged together as a unit (e.g., multiple titles on a single circulating tablet device) and checked out as a unit are counted as one unit. Report only items the library has selected as a part of the collection (exclude public domain / uncopyrighted e-periodicals that have unlimited access).

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

Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a

title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units.”

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

619. E-periodicals circulation

Circulation of electronic periodicals, for example, Zinio.

Bruce Pomerantz (MN)

Joyce,

I do not know if the vendor can distinguish between an e-periodical downloaded on a library’s computer or a mobile or stationary device not at the library. If the distinction can be made, do you count as circulation an e-periodical downloaded and read at the library, i.e., an in-house use count?

Joyce Chapman (NC)

We don’t have in-house use counts. We just ask them to report all the e-periodical circs in one category. Same with technology lending: we make no distinction about whether it’s lent for use inside or outside the library. Just one circulation count.

Beating a Dead Horse: Freegal and Tumblebooks

November 13, 2013

Question

Katrice Stewart (FL)

Hello all.

So, earlier this year we had much discussion about Freegal, Zinio, EBSCO, and Overdrive regarding whether or not they were databases. At that time, someone suggested a consensus page on the wiki of what was decided about how to count these things. As an aside, there was also much discussion about bodily harm in these discussions. At that time I didn't get it, but I SURE DO NOW. I'm finding I want to beat my head against the wall.....

One of my libraries wants to count Freegal and TumbleBooks as databases. If I look literally at the definition, Freegal isn't a database as it is not facts, bibliographic data, abstracts, or texts; it's just music. The library feels they are databases since they have "deluxe subscriptions" and do not pay per item. Our consensus page only got as far as Freeing being a database. I think Freegal is not a database and should be counted under audio-downloadable units. Did I miss a consensus on this back in January?

What about TumbleBooks? Again, a "deluxe subscription" which is paid for in total, not by download. Does it get back to whether or not the library chose the titles available?

For this newbie, databases is clear as mud.....Help !

SDC Comments

Ann Reed (OR)

Freegal = database.

Nicolle Steffen (CO)

Agreed. J

It's murky water indeed, here's what I told the Colorado libraries:

We've had several questions—and some interesting conversations—about how to "count" Freegal. I've done some investigating, lots of chatting with library and data folks, and I've concluded that Freegal is a database and should be counted as such. Near as I can tell Freegal is to music, as EBSCO is to journal articles. Here's my reasoning...

As with magazines and articles in a database, with Freegal...

- The library does not select any of the albums or tracks.
- The library does not own any of the albums or tracks.
- The patron goes into the music database, selects the track they want, downloads it for their personal use, and does not return it.

Therefore Freegal is a service to which the library subscribes, and as such Freegal's content is not part of the library's collection.

Michael Golrick (LA)

Thanks for laying it out this way Nicolle! I hope that your explanation can be captured, immortalized (even) for the future. Conceptually, it is right up there with "unit of purchase" which Susan used at our last meeting.

Susan Mark (WY)

Don't worry, Katrice, it's as clear as mud to us oldbies as well.

I can use an answer to this as well -- one of my libraries has Freegal. They gave me the downloads number, and I put it in their e-circ, but if it's a database I need to take it back out of there.

Laura Stone (AZ)

I think we need to map this out (again!) when we are in Saint Louie.

Ann Reed (OR)

The principals we laid down last year still apply here to Freegal. With Freegal, you get the contents of the Sony catalog. You have no control over content.

A lot of my libraries made that argument that people could download and keep up to 3 songs a week. Note that a user does not have exclusive access to any song, and does not "return" the file or have it disappear. I thought about this a great while. In a database, you can print out an article, and take it home and keep it for decades. Not much difference.

The key we determined is in the nature of the selection and licensing, not in the type of thing something is. I'm counting it as a database, and not including downloads in circulation. As I point out to libraries, they don't include printouts of articles in circ either.

Scott Dermont (IA)

Yep, I agree with Ann's definition here. I tell my libraries to count Freegal and TumbleBooks as databases. They have no control over the content here. To me it is similar model to EBSCOhost. There you download the article and keep it if you wish. You don't count it as a circ. Same thing is happening in Freegal. With TumbleBooks, don't you pretty much just use their website – is there any downloading going on at all?

Katrice Stewart (FL)

Thank you all for such a quick response! It really helps to think about the use and the fact that with a database, a patron keeps the material forever just as they would with Freegal.

Now, what about TumbleBooks..... I just saw Scott's comment about asking libraries to count TumbleBooks as databases as well. Are those books kept in perpetuity just as a Freegal song? Or is it because it is service being offered like EBSCO?

Thanks so much!

Scott Dermont (IA)

My understanding is that there is not a download involved with TumbleBooks. I thought you just used it from the website. I don't think the patron actually takes possession of anything. I could be wrong. But once again it is an issue where the library doesn't control the content. Since TumbleBooks is the content decider, I don't count it as part of a library's collection, and therefore do not count circulation.

Katrice Stewart (FL)

That is SOOOOOOOOOOOOOOOO helpful! Thank you all.

By the way, I'm updating the wiki page to help us if we want to continue this next month, well and forever!!!!

Now, where's that staple gun...

Laura Stone (AZ)

Where does that leave Zinio? Some people select their own titles; some take xxx most popular.

Terry Blauvelt (MO)

Missouri counts it if the library selects it for their collection, but counts it as a database if they did not select it for sole use of their library.

Robert Geiszler (VT)

For Vermont? What Terry said.

Lisa Hickle (OH)

Here is a tentative copy of what we are planning to provide for our libraries...subject to change. Please feel free to provide input if you feel anything is incorrect.

	Count Collection as	Count as Circulation?
Overdrive	Separate statistics into Downloadable Video (7.4), Downloadable Recordings (both Audiobooks and Music) (7.7), and eBooks (7.9) and report as appropriate	Yes
Freegal and Freading	Report as Local Database (7.11)	No
Hoopla (Midwest Tapes)	Report as Downloadable Video titles (7.4)	Yes
Zinio (Recorded Books)	Report as eBooks (7.9)	Yes
One-Click (Recorded Books)	Report as Downloadable Recordings (both Audiobooks and Music) (7.7)	Yes
3M Cloud Library	Report as eBooks (7.9)	Yes
Axis 360 (Baker and Taylor)	Separate statistics into Downloadable Recordings (both Audiobooks and Music) (7.7), and eBooks (7.9) and report as appropriate.	Yes
Ed2Go	NA Counted as a program: Ed2Go should be counted as 1 program and the patrons who use the service should be counted as attendees to the program	No
Freedom Flix/ TrueFlix/BookFlix	Report as Local Database (7.11)	No
Tumble Books	Report as Local Database (7.11)	No

Ann Reed (OR)

Yay! Can I poach a copy for my FAQ?

Nicolle Steffen (CO)

Lisa, this is great—I love the table! When it's finalized may we reprint?

Speaking of deceased equine, I have one additional question...

What about Zinio magazines? I still don't have a firm handle on how that service works—I'm getting conflicting reports from the field. Is a download a circ? Do you count each title even if the patron can only get the latest issue (i.e., no back issues, even from the current year)? The download feels like a circ, but the collection feels a bit like a database. Thoughts?

Lisa Hickle (OH)

Of course. This was done earlier in the year, as we were receiving questions from our libraries. I note that I need to change wording to "Downloadable Units". I was hoping for input from the SDCs and also plan to have our Ohio Ebook Project Administrator review it, as she has a better understanding/handle than I on these. I am finalizing our new survey, thus this recent thread ...made it clear that not only does Ohio's libraries need a source of reference, but I need to verify we are reporting what each of your states are.

Katrice Stewart (FL)

Love this as well, Lisa!!!!!!

Nicolle – love the deceased equine words but don't love that Zinio has magazines as well!!!!!! And just when I thought I about had it all understood.

Very funny – As I was writing this email, one of my libraries called and had a question specifically about Zinio magazines. My library said that it works a lot like Freegal so the patron downloads the entire magazine and gets to keep it. I'm leaning toward it being a database rather than circ.....

Joyce Chapman (NC)

We count Zinio as circs not a database. The reason we do this is because no one – local officials, funders of any type -- cares about or understands the statistic that is called "databases." Library staff are the only people who might possibly understand what that means. Even if you understand what "databases" means, it's a fairly meaningless statistic! But funders do care about statistics related to "circulation." I don't understand why we count databases but not circs for databases. If our goal is to present a somewhat accurate portrayal of what public libraries provide to their communities and how their communities make use of that, it doesn't make sense to me that we have a single category of things that we've decided not to report usage statistics for, despite reporting usage statistics for everything else. Obviously the contents of our databases are used... why not shout it from the rooftops? Particularly when the trend is that e-material circs are on the rise and analog material circs are decreasing.

So when possible we pull out the databases that we have the option to count as something else (like Zinio) so that their circs are reflected in our stats.

Michael Golrick (LA)

I want to give Jay Bank (KY) credit....he did a list which he shared with us back in October:

It is also how we are asking Kentucky libraries to count things.

July 19, 2016

I put a chart (“What Goes Where”) on our web page to help sort out some of the fuzzy items in our annual report (and to help me give consistent responses to questions!):

<http://kdla.ky.gov/librarians/plssd/Documents/WhatGoesWhere.pdf>

Jay Bank (KY)

I am still working on my version for Louisiana, the major change being the numbering of the questions I ask.

I was off on Friday and Monday, so that is why I am late to this conversation.

2014

Freegal "Movies"

January 13, 2014

Question

Lisa Hickle (OH)

Hi Everyone,

We've had a call from one of our libraries inquiring how to report Freegal "movies". My thought was that we should report as we do Freegal and Freading (database and do not count circulation), however we wanted to see what others are doing since the videos expire after 48 hours/there is simultaneous use of the videos and patrons are limited to 3 downloads per week.

Thanks for your feedback!!

SDC Comments

Jamie McCanless (WI)

Sounds like this qualifies as e-video units and e-video uses to me.

Terry Blauvelt (MO)

We count Freegal as a database, since the libraries subscribe to the service/access and do not select any of the units for their patrons.

Scott Dermont (IA)

My current model when looking at these things is to call it a database if the library does not select the titles. Without being more familiar with this service, I would probably call it a database, unless the libraries are responsible for content.

Frank Nelson (ID)

I'd call it a "freebase" if that didn't have such a bad connotation.

Nicolle Steffen (CO)

Ditto.

Hoopla Digital – does a library count the circulations

January 21, 2014

Question

Ann Reed (OR)

Perhaps Jay's handout of e-thing by question already answered this one. So... Hoopla Digital – does a library count the circulations?

Here is what I sent the library, but I indicated I wanted to run this by ya'll also:

So vis a vis Hoopla – is it more analogous to a database or to a library collection but in electronic format?

I took a look online and found a review from Library Journal, which describes the Hoopla Digital model:

Libraries that use Hoopla's pay-per-circulation model provide their patrons with access to the service's collection of media. Users can either go directly to Hoopla and sign in with their library card or begin at their library's own website, which will direct them to Hoopla's site to browse the offerings. When a patron checks out a video, audiobook, or album of music, his or her library pays a fee of between \$0.99 and \$2.99. The result, says SPL's Blankenship, is that libraries "only pay for what people are actually using."

Here are the definitions of a database and an e-audio item (e-book, e-vid and e-audio all follow same pattern):

Database

Report the number of licensed databases, including locally mounted or remote, full-text or not, for which temporary or permanent access rights have been acquired through payment by the local library, cooperative or consortial agreement. An example would be a genealogy database funded by an automation cooperative for the cooperative members. 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 that tutor.com is a service, not so much a database.

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. Each licensed database product is counted individually even if access to several licensed database products is supported through the same interface (e.g. via the Gale interface, a patron can access ERIC, a business magazine database, etc.)

E-audio

These are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced (played back) electronically. Report the number of units. Report only items the library has selected as part of the collection.

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

Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units”.

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

Three things stand out: 1. The library does not choose or purchase items. 2. Items don’t really become part of a library’s collection. 3. Items have finite use like items from the library collection.

My inclination here is to liken this to the old Dialog service where you paid for articles to be delivered ASAP online, and call it a database. I admit, this is a fuzzy case due to #3. I think it does raise the spirit of larger issues – such as “what is a library collection” and “should we try to count most major items, or switch to national indicators.” I think the library should track and maybe have a local flavor of numbers that do include this in circulation. For keeping everyone on a “apples to apples” comparison, don’t count uses.

What do you think? Would you rule differently on this one?

Heading to the papercutter now.

SDC Comments

Scott Dermont (IA)

Maybe I’ve become too set in my thinking with these, but my rule of thumb is that if the library has no control over the content, then I call it a database. If it is a database, then the library does not count it towards collection size or circulation. We currently don’t have a question regarding database use because vendors don’t have a standard way of counting things.

I do admit that my mode of thinking about this kind of stuff is getting out of sync with reality. As we get more of these kinds of services, we are going to have to figure out a way to count their use. Libraries need to do this anyway to justify their ongoing cost. In the beginning I felt myself very opposed to these kinds of services. Libraries are about sharing resources, not giving them away for “free.” But now I

wonder if they are the future. A library can subscribe to a service that just gives the patron whatever they want – and the library pays for that item(s). It makes it a lot easier as a librarian. You don't need to worry about fussy things like collection development or weeding. Just let Freegal and Hoopla handle that for you.

Terry Blauvelt (MO)

I would agree that it wouldn't meet the collection requirement of selection (the library does ultimately pay the fee, which is a purchase). I also think that since it requires the use of a library card, that it should be included in circulation figures (which may trigger edit checks and skew turns).

Scott Dermont (IA)

But generally all online databases need the use of a library card to access – at least for remote access. I would not count the use of a database as circulation just because it needs a card to access. I think doing this would vastly increase circulation figures. I think we came to the consensus at the SDC conference this year that there was no reliable way for us to count use on databases because there is no standard definition of use from vendor to vendor.

Patience Frederiksen (AK)

I am wondering if we need to consider a new circulation element:

Count of patron driven acquisitions, being the count of the number of items chosen by patrons annually to view or download that is paid for individually by the library for the patrons.

Just a thought.

Scott Dermont (IA)

I think we would have to be really clear what we are counting. It could be confused with a more general count of database use. But maybe that is OK. I think some services like Freegal would be fairly easy to count as the library is billed per transaction. Something like Heritage Quest or EBSCOhost would be more difficult to count as it would be difficult to determine what should be counted as a use.

Lauren Miklovic (RI)

Hi all,

I agree with Scott about the database usage count- I do collect monthly statistics from all of the statewide databases and it's not apples to apples. With something like EBSCO the searches are considered the most important stat (at least from our end), while something like Mango Languages

emphasizes user sessions and session time. It would be very difficult to lump them all in and capture usage equally. It's already a struggle at the state level, at least for me!

Terry Blauvelt (MO)

For the most part, databases only require a library card for access, not checking out specific materials. This is where OverDrive, Hoopla, etc. are different, as these use the library card to check out specific items, not general access. Furthermore, the aforementioned (OverDrive, Hoopla, etc.) have specific checkout durations and log what is checked out/circulation, whereas general databases do not (at least with any consistency). These databases mirror a regular collection, with the exception of where they are held and who selects them. Just my non-librarian point-of-view.

Scott Dermont (IA)

I think that is a good point. I was reading your initial message as a more general use of the card. I think it could help the definition to specify that these individual items need a card be "checked out." OverDrive has not been a problem in Iowa as our two consortia are totally responsible for buying content. But my understanding is that is not always the case.

I do have to say that I see a difference between a service like Overdrive and a service like Hoopla or Freegal. Overdrive uses a more traditional library model where an item is checked out and "returned." The others are basically a download service where once an item is paid for (by the library) the patron can keep and use it forever. Maybe this is too fine a line, but I see the difference. On the other hand, library directors may not see the difference. They are most concerned with providing content to their patrons, and not as worried about the model used or how it is counted. As long as it can be shown that it is being used and earning its keep, that may be all they care about. Like I said earlier, I may be stuck in the past...

Scott Dermont (IA)

I think that is a good clarification. I do think it is clear to us, I just want to make sure it is clear to the end users. But I think you've made a good start at it Patience.

Nicolle Steffen (CO)

I agree, Hoopla sounds like a database and as such should not be counted in circulation.

My 2-cents.

Ann Reed (OR)

Thanks all, good to confirm I'm running with the herd (even if we might be running to a digital cliff).

eBook/eAudio statistics issues

January 30, 2014

Question

Stacey Malek (TX)

Dear all,

I got a call yesterday from a library that is part of an ebook consortium. She asked me how they should count those ebooks. We went through the new definition clarifications for unit of purchase, but part of the licensing agreement doesn't seem to fit the new simultaneous use definitions. Part of the licensing does; one title for single use, or unlimited use. However, the consortium purchased 2,040 titles with 81,328 licenses. As I understand it, the license is not tied to specific titles. This is for the entire consortium. So, it is not really "single use" or "unlimited use." After talking with her, I believe she should count the 2,040 for the number of ebooks and not the 81,328, since those licenses are not tied to the titles.

I'd like to know if anyone else has come across this particular licensing arrangement and if we are on the right track for counting those ebooks.

The librarian was kind enough to send me an email, below, outlining the issue and how she and I think it should be counted.

Thanks for your help!

SDC Comments

Jamie McCanless (WI)

We agree with using the 2,040 number and counting the library's total e-books as 3,201 units.

As described, there is no limit to the number of users who can access a title at any given time so I'd treat it as unlimited simultaneous use. The total number of uses just isn't part of either federal definition.

John DeBacher (former SDC WI)

Looking at this, I suggest using the 2,751 as the total. At least in our statewide consortium, separate epub and Kindle purchases are not made for titles. Instead, the consortium purchases a "copy" of a title (one-to-one use), and that title is available in as many as 3 formats (epub, PDF, Kindle), but still limited to one-at-a-time access.

I posted the question out to some on our statewide Overdrive consortia selection committee. Here's the response I got:

The individual copy is available in several formats, but only the title is selected, not the format. Thus a title in both Kindle and E-pub counts as 1 not 2. The patron selects the format upon checkout, and then the item is considered checked out and unavailable until returned, regardless of the format. Multiple copies of a title are treated just as if they were an additional print copy.

I hope that helps (confuse things)!

Zinio...again....still

January 31, 2014

Question

Nicolle Steffen (CO)

Good morning from snowy Denver. Here's the latest conundrum from Colorado...

Counting Zinio as a database or part of the library collection still seems unresolved (see: <http://plsc.pbworks.com/w/page/62572262/e-content>).

I just spoke with a library staffer whose library uses Zinio for magazine delivery. She questioned counting Zinio as a database. She thinks the Zinio magazines should be considered part of the collection because the library selects the titles and the magazines check-out "just like an e-book from Overdrive." A good argument for counting them as part of the collection.

However, the library's patrons can only access the most recent issue of each magazine. In affect Zinio automatically deaccessiones the magazines from the library's collection after one month.

So, are the books part of the collection? Or are they simple leased, one month at a time? Does that make any difference?

Any and all feedback is appreciated.

SDC Comments

Jamie McCanless (WI)

This year I've gotten several questions about reporting electronic magazine subscriptions. I nicely answer "no" as they are not e-books and we make the corresponding exclusion of periodicals from the number of "non-serial printed publications" (books).

Current Electronic Subscriptions was a data element collected at the federal level until FY 2010. Here in Wisconsin, the total was very, very low... 1,167 electronic subscriptions statewide for FY 2009, compared to 45,962 periodical subscriptions and 20,056,755 book and serial volumes in print.

The FY 2009 definition of Current Electronic Serial Subscriptions was:

The number of current electronic, electronic or other format, and digital serial subscriptions (e-serials, e-journals), including duplicates, for all outlets. 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. Electronic serial subscriptions include 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 serial content (e.g., EBSCO Host, ProQuest, OCLC FirstSearch).

Maybe we (SDCs) should consider reinstating it, but for now I tell our libraries they can add notes to us about their electronic subscriptions to help us evaluate whether to collect it at the state level, but this year they are not included in the annual report.

Katrice Stewart (FL)

Keeping in mind that I am still very, very new to all of this, I would sort of thing that maybe in this specific circumstance it could be part of the collection. In all of the discussions we've had and me trying to get my head around this the one thing that sticks out is whether or not the library is able to select the titles - if so, it's in the collection and circulation is counted and if not, well it's a database. I know that at the heart of all of this it's not that simple. The major issue is there are just sooooo many variations on these e-resources it's just hard to even contemplate.

Okay, I'm done just rambling now :)

Nicolle Steffen (CO)

Thanks Jamie, good advice on the "non-serial printed publications."

Sorry, I didn't mean to imply that Zinio should be counted with e-books. I want to know if Zinio is part of the collection in order to decide if it is counted in circulation. In Colorado our guidance to libraries has always been that only items in the collection are counted in circulation.

Stacey Malek (TX)

We still have the electronic subscriptions question, so that is where I am planning on having it reported and as part of circulation. So, I would say that it is part of the collection.

Issues with admin offices for libraries

February 28, 2014

Question

Joyce Chapman (NC)

The Census people just enlightened me with a tidbit of important information that neither I nor the libraries in my state has been aware of... so I'm thinking there could be others out there suffering from the same confusion. If others also find this confusing, perhaps the new Definitions committee could be tasked to add clarifying language somewhere.

1. Administrative offices for regional library systems should **not** be reported as outlets if they are physically located apart from locations that circulate materials, etc. They should be ignored.
2. Regardless of where administrative offices for regional libraries are located (inside another branch or separate), **nothing** about them is supposed to be reported in PLS, including the staff FTE that work there, the money that pays the salaries of the staff that work there, etc. Is your library director, finance manager, etc., at the regional office? Then they and their salary are not supposed to be reported in PLS FTE and funding numbers. The exception might be bookmobile staff who work at the admin office, since the bookmobile doesn't have physical location of its own (I had this come up in the example I was working on with Census).

This came as a shock to me and I'm pretty sure that none of my regionals are reporting on issue #2 correctly. I'm also pretty sure it is going to cause a bunch of headaches to try and pull apart FTE and money that are attached to admin offices from everything else, particularly for all the cases in which the admin offices at branch outlets.

Did everyone know this except me? Are people not reporting regional facilities as outlets currently, but reporting the FTE and funding with everything else?

SDC Comments

Joy Garretson (MS)

I didn't know this! I'm almost positive that my librarians are not separating Headquarters/admin staff from their totals. The directions don't mention separating out the HQ/admin staff from the branch staff (that I could tell).

I have several systems in which the system director also does double duty as a librarian in the branch that his/her office is housed in. How would we separate out the salary info for these individuals? Has this been discussed at previous SDC conferences?

Peter Haxton, watch out! I'm probably going to be calling you soon!

Joyce Chapman (NC)

I also have regional directors that rotate libraries, so they might work in the regional office one day a week but are at branch libraries other days. What are we supposed to do with something like that?

Terry Blauvelt (MO)

I did not know this either. However, off the top of my head, I think I only have two library districts where the administrative unit is separate from the administrative entity library.

Cecilie Maynor (TN)

We have not been reporting the 9 regional libraries we have in Tennessee as they are part of the state library and do not have normal library functions. Our regional offices are not located in libraries. It sounds like our definition of a regional library is different though.

Susan Mark (WY)

That does not sound right to me.

Looking at the definition for total FTE (1st one I grabbed), its says to " Include all positions funded in the library's budget whether those positions are filled or not."

<http://plsc.pbworks.com/w/page/7422539/253%20Total%20Paid%20Employees>

These positions are funded by the library budget, my interpretation is that they would be reported.

Then the expenditures questions says to report for all library staff -- per the 250-253 definitions, this would include those at the admin offices.

<http://plsc.pbworks.com/w/page/7422546/350%20Salaries%20and%20Wages%20Expenditures>

Stacey Malek (TX)

I agree with Susan. I knew they did not want the admin office as an outlet, but have never heard of not including staff/salaries. Agree that the definitions do not state to exclude those staff/salary and I don't know why we would.

Joyce Chapman (NC)

When I say “regional” library I’m talking about libraries that are a single AE but they encompass multiple county libraries (like a 3-county library system) so are likely to have a set of administrative offices that are either in one of the county libraries or somewhere not in a branch.

Patti explained this on the phone yesterday. Maybe Patti can respond to issues about this not looking right according to the definitions of other questions, are the Census people on this listserv?

Nicolle Steffen (CO)

This doesn’t “feel” right. Is it possible that the folks at Census are referring to regional systems that serve libraries as opposed to library jurisdictions (also called systems) that serve the public? In Colorado a regional library system is something quite different than a public library jurisdiction.

As far as reporting for public libraries, why would we not be counting the library’s administration and support staff? And, where would you draw the line? Of course, we count the library director’s salary, the financial director, and the IT director...and all the other library administrators our big library jurisdictions employ.

To quote Keith Lance, “this doesn’t pass the giggle test.”

Susan Mark (WY)

IMHO, if it's in the library budget, it should get reported. Period. Doesn't matter a hill of beans where the library director is as long as he/she is part of the library.

The sticky wicket might be with regional libraries encompassing more than one AE. Anyone dealing with those?

Darla Gunning (CA)

I agree with Susan that the issue about reporting FTE does NOT sound correct and I would argue that most working in an administrative are performing library related duties. We absolutely should be counting those bodies, salaries, etc. including operational costs of those facilities. If we do not count then there is not an accurate picture of operating a library system as a whole.

Katrice Stewart (FL)

I agree with Susan and Stacey. An admin office does not meet the definition of an outlet. I does not make sense to not include those staff though....

Robbie DeBuff (NV)

I would ask a bit of clarification at this point. I agree that there might be some disparagement between library jurisdictions and regional libraries. If I have a library jurisdiction, whether it crosses counties or not, the administration housed in one of the buildings, is considered and paid for out of the library jurisdictions budget, correct? Therefore, ipso facto, count the staff and the library.

So if someone can email me an example of where this variance might occur, I think it would help clear up some things for me... And again, as mentioned earlier, maybe Census can chime in on this?

And by the way, anyone seeing how this will totally skew any data integrity in the future?? UGH...

Joyce Chapman (NC)

In the example Census was working on with me, we were talking about a single AE called a "regional library" here in NC that encompasses several county library systems. We were definitely talking about a normal AE – just one that had administrative offices. These offices were separate from any physical facility that circulates materials in the example we discussed. 6 FTE work there, including the director and finance manager. She said not to count the FTE or their salaries in reporting, and she was also saying that even if the admin offices had been housed inside one of the county libraries I wouldn't have counted the FTE or salaries.

I agree, let's get Census' clarifications in here at this point!

Diana Very (GA)

I agree that this doesn't make sense. This seems to be a discussion for the definitions committee. Can we put it on the agenda for next year's conference? Thanks,

Susan Mark (WY)

Has anyone else been instructed to do this? Worse yet, has anyone actually DONE this?

As far as I can tell, this is a plain and simple misinterpretation on Census's part. Data elements 250-253 clearly state that if those employees are under the library's budget, you report them. The AE, not the outlet, is the basis for all staffing and budget data elements.

With this (mis)interpretation, you could have a situation where a main library outgrows its building, and moves its admin stuff to a building across the street and suddenly loses a huge chunk of its staffing and a huge chunk of its budget.

This does not pass the giggle test, nor the sniff test.

Susan Mark (WY)

Personally, I think this issue could be dealt with now without putting it on the agenda. The definitions are pretty clear.

Michael Golrick (LA)

Dilated pupils and all, my mind is swimming on my day off.

Let me offer this...I think that the definition of the term "regional library" may be the problem.

There is now a "Definitions Committee" and as one of the co-chairs, let me volunteer that group to make this the next item we will work on (which I am hoping that it is a matter of clarification). We have almost finished with defining Reference Transaction, this could actually be easier.

I have a funky work week next week. Mardi Gras (Tuesday) is a state holiday, but I will take it as my responsibility to talk with Joyce and with the Census folks at some point in the week to try to get a clarification.

Just for the record, for many of my AEs, "Regional Library" is a term used to designate the larger branches which often have larger collections, more hours, and often much larger meeting rooms. I have one "multi-parish" AE.

I also know that there are Regional "Systems" in states like Wisconsin [Hi, Jamie] which coordinate some of the services of the public libraries (each separate AEs) for a defined geographic area - usually several counties. They also help the State Library Agency in the data collection and review. Some are housed in libraries, some are not, and to the best of my knowledge have never been included in the PLS -- and should not be. So, I am hoping this is just a terminology misunderstanding.

Happy weekend all - I'll think of you as I wander the bead filled streets of South Louisiana....it is parade season here!

John DeBacher (former SDC, WI)

As Steve Martin used to say, "I blame myself...."

Michael refers to our "Public Library Systems," that operate with fairly considerable state funds to coordinate public library services, provide continuing education, and support resource sharing (primarily with shared ILS catalogs and delivery, as well as ILL support). In some other states, they have been eliminated or have been condensed into one or two regions. In the early days (the 1970s), Wisconsin's were all hosted by the largest public library in the region, but now only a few still are. Those costs are not reported by the related public libraries, though sometimes there is conflation of services. At the SDC cult meetings, I have referred to those as "Public library regional systems" since many states (and the Gates Foundation) uses "Public Library System" to refer to an administrative entity, and outlets (central/main library and branches).

But as Susan commented, there are public libraries where the administrative entity's operations are located in a different location from the main library. Those might have offices for director, business operations, even technical services and storage collections, but no public services. Those are all related to and directly support the public library services to the public. Going back a step further in Wisconsin SDC history, in "What Would AI Do?" parlance, those costs and personnel should all be included in the administrative report for the library.

Some of the difference is defined in the 200 Interlibrary Relationship Code language:

HQ—Headquarters of a Federation or Cooperative. The library or entity that provides the physical space and staff who manage, coordinate, or administer the programs of the federation or cooperative.

Note: Agencies that serve other libraries rather than the public should not be reported to FSCS.

And the 202 "Administrative Structure Code"

HQ—Headquarters of a Federation or Cooperative. The library or entity that provides the physical space and staff who manage, coordinate, or administer the programs of the federation or cooperative.

Note: Agencies that serve other libraries rather than the public should not be reported to FSCS.

The former should not be reported; the latter should.

So it shall be written (or "has been written"). So it shall be done.

Laura Stone (AZ)

This is a good example of how differently libraries are organized in different parts of the country. And sometimes even in one state.

As Arizona has no law defining a public library, and we do not certify libraries or librarians, we're left to define and redefine this at the State Library. We have fifteen counties in our large state, and about five different organizational models.

We do have a number of county systems where the administrative office and much of the leadership staff is located in a building that does NOT serve as a public library building. I think this is similar to Joyce's situation, and it makes no sense at all to me that we wouldn't count what goes on there. And yes, they need to be included on the report if you want the library's business address. Just because the head of children's services is in the admin office, doesn't mean he's not doing important work for the branches.

And then we have a small group that I've long troubled over. These are county library offices that provide services to the municipalities in their counties. They usually manage rotating book collections, provide support for databases, manage the ILL system, and the ILS. Often, they are among the only degreed librarians in the county. To not reflect them on the report is to discard a lot of the library service and support in that county. As they each provide contract services to several non-profit libraries, I shoehorn them all together so that it looks like an admin office and a few little outlets – but it's really a

herding dog adopting chickens. Is it disingenuous? Seems like reporting them better represents library activity in that county than not reporting them.

That gets back to a question I continue to struggle with. What's the purpose of the report? Are we representing library service available to the public? Or publically funded libraries? Do we want to understand broadly what kind of service Americans have, or focus on service that falls within a constrained framework? I appreciate our FSCS definition; my experience is that it needs to have some flexibility.

Hurrah! It's 5 p.m. on Friday afternoon! Hope the rest of you are already enjoying the weekend,

Patty O'Shea (**Census**)

I apologize for not chiming in sooner. Yes, I did misunderstand some things.

The main point I was trying to make is that an administrative office should not be added as an outlet. John found the note for item 202 I was looking for: Agencies that serve other libraries rather than the public should not be reported to FSCS.

I agree that the library's administrative and support staff should be counted if they are part of the library's budget.

I agree that Regional "Systems" that coordinate some services of the public libraries should not be included in the PLS.

Joyce - Can you describe the specific example we were discussing? There was one AE with 3 branches and 1 bookmobile. We were saying that an administrative office should not be added as an outlet.

Sorry for any misunderstanding.

Have a great weekend!

Michael Golrick (LA)

Conclusion of Issues with admin offices for libraries

Good morning-

I was sitting at home, minding my own business Friday when this discussion began. I promised to follow up and I have. It took a little longer than planned because Monday turned into a snow day for some folks, and Tuesday was Mardi Gras (and a holiday for me).

There was some confusion about terminology and structure issues as well as data.

So, to recap, there is some data which is counted at the Outlet level, and other data collected at the Administrative Entity level. There is also some data which is **not** counted for Bookmobiles, but is counted for Outlets.

Part of what is not counted for Bookmobiles is square footage. Nor is that space counted for AE offices which are not included inside an Outlet. So, for Joyce's example, the AE (which has its location/address reported) is outside of any outlets. The outlets report square footage of each location. The bookmobile is reported, but there is no square footage associated with it.

We do count for the whole AE all of the costs. Those costs are not separated or assigned to any outlet or physical location, they are aggregated for the whole AE. We also report staff levels for the whole AE, no matter whether they work at on a Bookmobile, at an Outlet, or within a separate administrative office, they are all part of the operations of the AE, and get reported.

So, I hope this helps....I know that Patty and Joyce are content with their respective understandings.

Happy rest of the work week!

Bond payments

March 17, 2014

Question

Laura Stone (AZ)

I'm thinking we've chatted about this, but am not finding it on the Wiki: Where do we record bond payments for construction? I'm thinking it's under Capital expenditures, and we just record the amount year after year?

SDC Comments

Susan Mark (WY)

I hesitate to comment, for fear that I've been doing it wrong, but I'm goin' in.

My feeling is that bonds for capital improvements, other than the interest, are not revenue or expenditures.

If I get a cash advance on my credit card, I don't consider it to be income. A bond is simply the library borrowing money. The revenue is when the county (in our case) collects the tax receipts and that the expenditure is what is spent on the actual capital improvement as it happens. The interest on the bond would be a capital expenditure, but the principle would not.

OK, throw staplers at me now....

Scott Dermont (IA)

But my understanding is that the library is not paying the interest on the bond, the taxpayers are. So I would not include bond payments or interest payments on the survey. The way I see it is the taxpayers vote to pay for the bond issue and the interest. Once the bond issue passes, the library receives the capital income from the county or city, which is reported on the survey as capital income. Then the library expends the capital on the building, which is included on the survey as capital expenditure. But the library does not pay the interest, nor does the library pay back the principal of the bond.

Susan Mark (WY)

That makes more sense on the interest. Thanks for the clarification, Scott.

Laura Stone (AZ)

Is it always such that there is a corresponding tax increase? Or are there cases where the governmental entity agrees to absorb this payment into existing revenue streams?

Susan Mark (WY)

There may be, but I wouldn't think that would make a difference in terms of how revenue/expenditures would be handled. It's still borrowed money, whereas the revenue that's being used to pay it off is the actual revenue. The actual expenditures is whatever you're spending it on.

Scott Dermont (IA)

I would think that it depends. I have a lot of libraries that have a capital fund that is paid into each year to cover things like broken furnaces or leaky roofs. Depending on what it is, we may or may not have them report it as a capital or operating expense on the survey. But for their purposes, these are all considered capital expenses, and in some cases are quite expensive. I assume that this is coming from the regular general fund. I would think the bond issues with a tax increase would be for things like major building expenses like an expansion or new building.

Michael Golrick (LA)

What Ann said. In fact I have a couple libraries who did this, including one which paid off the bonds early in the past year or so.

Counting e-books, downloadable audio, downloadable video in circ and collection

March 19, 2014

Question

Diana Very (GA)

I have a question about how everyone is counting e-books, but not the discussion about e-books or database.

I changed my process this year by counting the e-books at the AE level and not counting them for each of the branches. My reasoning is that the AE is the level that paid for the units and therefore the units should only be counted at the AE level. All outlets use the units, but they are still only paid for by the AE.

Since more library systems are buying e-books through a consortium in Georgia, I am having different answers from libraries on how they count. I thought that I explained this but apparently not. I found many wanted to count the circulation but didn't count them as part of the collection. I also found that the libraries want to lump e-books, downloadable audio, downloadable video together as one number.

It's been difficult to get any good data. I was wondering if anyone else has had these problems. I'm going to do some training in May at our state-wide directors' meeting, but this year my data is faulty.

Any helpful ideas?

SDC Comments

Terry Blauvelt (MO)

I ended up separating the questions into "Library Held E-Books" and "Consortia Held E-Books" as the libraries tend to view them as one in the same otherwise. I did the same thing with downloadable audio. The consortia's in Missouri select and hold the books, while the member libraries pay a subscription fee for access to a max number of e-materials. The greater the level of subscription the higher the subscription fee. I have no use for the number in "Consortia Held E-Books" (likely 10,701 per member library), but think it may get me more realistic numbers for the "Library Held E-Books."

I won't run this until this fall (FY14), but it will be better (at least easier on me) than last year. Last year's numbers were a great improvement over FY12. I'm not sure at what point I would deem the data as reliable.

Laura Stone (AZ)

Yes, I agree that ebooks counts are best at the AE level, not the outlet level. It's my experience that they are owned by the system as a whole, not a branch.

Our survey has "sections" for ebooks, audio books, music and video downloads, and we ask the libraries to list each product, whether it is consortial or not, the number of units and circ for the library. We review carefully to make sure that a "database" wasn't included in the list of products. We then auto add the download circs to physical circs for total circs. Because we show the consortial purchases in the download units, we don't provide county or statewide totals for that measure.

This year, AZ used the "Is it a database?" chart at <http://plsc.pbworks.com/w/page/75289169/Is%20it%20a%20database> , as the authority on whether to include or not. That said, I got some pushback on Zinio, Freading and Tumblebooks. Here's what one librarian told me: "As far as Freading and TumbleBooks goes, I guess OneClickDigital could also go with databases then because we didn't select their multiuse audiobook titles. Now we also have the single-use titles and will have to differentiate and count audiobooks in two way, huh? Sounds like the national folks need to work on their definition of eBooks - since declaring them a database if titles aren't pre-selected falsely/inaccurately reports the availability of these resources in public libraries - just what I thought they were trying to find out!"

I think downloadables are still a work in progress!

Robert Jones (IL)

Thanks again Laura for pointing me in the right direction with my Zinio question. The "Is it a database" referral was extremely helpful and I will definitely be turning to it often for FY14 data submission!

Nicolle Steffen (CO)

Like Laura, I'm getting pushback on Zinio as a database. The reasons: 1) libraries choose the magazine titles (unlike Freegal) and 2) patrons check-out the whole magazine (unlike a database of articles).

Is this something we should reconsider for next year? Did we get rid of data element "459 Current Electronic Serial Subscriptions" too soon?

Something to consider...

Joyce Chapman (NC)

We do not count Zinio as a database for the reasons you mention. We have a question for e-periodicals and another for the circulation of e-periodicals. We count Zinio there, and the number is fed into IMLS' new question ELMATCIR (total electronic materials circulation).

Nicolle Steffen (CO)

Thanks Joyce--I like your strategy and we are considering doing something similar next year in Colorado. However, if Colorado libraries diverge from what other states are doing I fear our data will not be comparable for several key statistics and ultimately it will undermine our collection. It's a bit of a dilemma.

For-a-fee programs, to count or not to count

March 19, 2014

Question

Nicolle Steffen (CO)

We have a library that offers both free and for-a-fee programs (fees usually cover the cost of materials or other expenses). The director wanted to know if she can count the programs that charge a fee or should she only report free programs in her PLS data.

I'd never really consider this point. Have you? What do you advise your libraries?

Any and all input is greatly appreciated.

SDC Comments

Susan Mark (WY)

I'd count them if it's something where the fee is just to cover costs.

If the event is actually a fundraiser, no.

Diana Very (GA)

I agree.

Scott Dermont (IA)

We don't differentiate between fee based or free programs. The program still needs to meet our definition. You could possibly call a fund raiser an entertainment or educational opportunity depending on what is done. I know that many libraries here have been doing a trivia night style fundraiser. I would probably let them count something like that.

Is it a branch library?

March 21, 2014

Question

Nicolle Steffen (CO)

We've got a library jurisdiction that has added library computing centers in four locations. In my book they come very close to being branch libraries, but miss on the "organized collection" stipulation of the definition...sort of. Library patrons can access the entire eCollection, plus they can pick-up/drop-off materials from the physical collection.

Here's how the locations stack up against the definition:

- The four library computing centers have "separate quarters" within existing buildings (two rec centers, one Kmart, and an office building).
- There is not an organized collection of library materials onsite, but at two of the locations patrons can pick-up and return physical materials and access electronic materials.
- There is library staff onsite during hours of operation.
- There are regularly scheduled hours.

Seems like two of location are definitely not branch libraries. However, the two locations with pick-up/drop-off of materials come pretty close. Thoughts?

Thinking Big Picture...Do we need to start contemplating when and how we count other types of outlets? I feel like I'm channeling Bruce. :-)

Happy Friday.

SDC Comments

Ann Reed (OR)

We have a similar situation where a city wanted to set up a group of computers, buy no physical items and call the place a "library." The local library coop they wanted to join sure didn't think of them that way. The definition states a library provides "at least the following... an organized collection of printed or other library materials or a combination there of."

I can see an argument about available e-materials filling that requirement, if all patrons had email and computers at home, or the ability to download device and carry off a copy to use for a while.

On the other hand, we say "provides at least an organized... collection," not "provides access to." Then too, can one really say you have a balanced collection meeting the public's needs with only e-items?

I'd be leaning to saying no, not a branch.

In a similar problem, what about self operated kiosks? Has space, collection, public funding, but no staff. Argh. Beats head on desk again.

Carlos Manjarrez (IMLS)

This is a fascinating discussion. Folks here at IMLS would be curious to know how many other states have new service configurations that toggle just below your state's definition for a public library. Also, are you witnessing growth in these new (things).

Scott Dermont (IA)

Sounds to me like a remote computer lab or an Internet café, not a branch. Personally I am resisting the urge to call a collection of Internet computers a library. This seems like a very slippery slope to me. But I guess that is me talking as a librarian.

Beth Bisbano (PA)

Sharing this article as the reality of the future:

<http://www.usatoday.com/story/money/business/2014/01/04/san-antonio-bookless-public-library/4310655/>

I'm not sure why we would want to be in denial about it.

Susan Mark (WY)

Looking at the definition, I'm having a hard time figuring out how we can deny that these are libraries. They have staff, space and a schedule. They have a collection -- it's just electronic, rather than physical. We're collecting stats on ebook holdings -- how are they suddenly not a collection just because we recoil at the idea that without books, there is not a collection?

I just checked the definition, and it says nothing about the collection having to be physical.

<http://plsc.pbworks.com/w/page/7422534/210%20Number%20of%20Branch%20Libraries>

This doesn't mean we may not want to revisit the definition. All I am saying is that under the current definition, I am scratching my head trying to come up with a justifiable reason to deny these.

Diana Very (GA)

Thanks, Beth, for sending this article. I can see the need to think through this technology change instead of naming it an internet cafe and not counting it as a library service branch.

Scott Dermont (IA)

I'm definitely familiar with the bookless library in Bexar County, and I disagree that this library is the reality of the future. In Iowa we are already seeing the use of library computers declining, not increasing. The main reason is that many schools are now going to a one to one ratio for computers to students. Anecdotally, we are seeing an increase in the amount of wireless use. I am also not seeing a huge spike in the number of e-resources that are being used. More libraries are buying into our two statewide e-book consortia, but I am not seeing much increase beyond that.

The main purpose of the computer lab is to give people without devices access to online resources. As more and more people have their own access to cheaper devices, the less this service will get used in the library. I'm not saying that it won't get used, there will always be people who don't have the devices. I'm just saying the model of having a bunch of devices in a lab like environment will be less useful. In some ways, the Bibliotech is a response to a need from the 1990s. I see the point of this being located in an economically depressed area. But to say that all they need in their library is a computer lab is shortchanging that community. There are lots of other services that libraries provide, beyond collections, that still make the library useful. To me, this is in some ways like setting up a Redbox and saying that is all the library that the community needs.

I guess this doesn't really speak to whether or not these kinds of facilities would be considered a branch or not. In the case of the Bexar County library, how is it reported for survey purposes? Is it considered a main branch or is it a branch of another library. I couldn't find it on the IMLS site, so I'm assuming it is too new to show up yet. But that could be a model to use. Since they don't have a physical collection, and I assume don't provide more traditional services like story times, then maybe they could have their own category of branch. This would allow us to track them separately and watch them as an emerging trend.

Michael Golrick (LA)

I was looking at this question before I had to go to the Reference Desk and then participate in "inventory."

Thanks for reminding us of the definition of a branch (Data element 201: <http://plsc.pbworks.com/w/page/7422534/210%20Number%20of%20Branch%20Libraries>). I have one library system which has a location which focuses on the electronic resources, but it does also have some seating and subscriptions. I actually went and visited it before coming to the conclusion that it really does count as a branch.

Now, as a public library director, I had an e-kiosk installed in a local mall which was simply, and purely e-resources with a printer. (We charged for printing, long story, blah, blah.) What would have complicated it was that it was in the neighboring town – although within hundreds of feet of the city border. However, it was clear that it was not a branch, primarily because of #3, paid staff.

I think that the staffing is a key part of defining a library and its services. In one of the social media fora, there was a discussion recently about "being a librarian" outside the walls of a building. While this is

something outside our scope, it is an interesting conversation about the profession and our future as a profession and the institution with which we are affiliated.

Oh, and remember the Santayana quote: “Those who cannot remember the past are condemned to repeat it.” [George Santayana (1905) Reason in Common Sense, p. 284, volume 1 of The Life of Reason]

As Carlos asked, I wonder if there is a trend? (How many make a trend?) While I seem to read about some individual situations in the library press, I am not sure that I have seen enough to make a trend. Then again, we may be the ones who can first see it.

Happy Monday!

Stacey Malek (TX)

Sorry everyone, I’ve been swamped with a project and have just now started reading these emails. Thanks to Beth for forwarding the article about the new San Antonio library, BiblioTech. There are LOTS of articles online, if you have the time to read them, but the point is they are library without a physical collection. They only have an e-book collection. They certainly meet the other parts of the definition and opened in a traditionally underserved area of Bexar County. They plan to open more branches and provide county-wide service.

I’ve read 203 FSCS definition of a public library and it does state that the collection needs to be “an organized collection of printed or other library materials, or a combination thereof.”

However, we accredited them for our current state fiscal year and I consider them a public library. Accreditation for public libraries in Texas means they are eligible for certain services from the State Library, including the statewide databases and E-rate.

I agree with Susan. Why are ebook holdings not a collection? I think we may need to revisit the definition.

Darla Gunning (CA)

I agree with Susan and Stacey. My two cents, as long as there is paid staff to assist those seeking information I don’t think the format in which that info exists should be the issue. For those sites where there is no staff & it is just a drop off/pick up location only then that does not meet the criteria.

MaryAnn VanCura (MN)

Hi, all. Is it safe or fair to say I am the new “Bruce”? I have big shoes to fill!

Minnesota has several established and emerging public service outlet efforts that would fit into an “Other Public Service Outlet” category. Bruce summarized them here a while back – Counting less than a branch and more than a book station.

The libraries that provide alternative service points want to see the public service statistics generated by these initiatives reflected in their annual report. As I learn and review the Minnesota practices, it's very helpful to hear what other states are doing for "other outlets".

Nicolle Steffen (CO)

Maybe it's time to contemplate reporting outlets differently. We could collect data on full-service branches, computer labs, and...?

In Colorado we ask for a count, but not specifics about:

- Number of outreach vehicles
- Number of other outlets

Using tax forms for circ stats? And yet another database query!

March 25, 2014

Question

Joy Garretson (MS)

I'm going through one of my systems' stats, and this particular director has left copious notes about her information-gathering process. In those notes, she mentions some things that concern me:

1. She uses "tax forms actually distributed to the public" as part of her calculations for total circulation in her system. That's weird, right? I know that many of our libraries order tax forms and distribute them freely, but I would assume that those forms aren't checked out (and thus aren't in accordance with the note on that item's definition that states, "Count all materials in all formats that are charged out for use outside the library.").

Have any of you run into this before? I just want to make sure I'm correct in thinking that she shouldn't count that as a circ before I write her an email/call her about it.

2. I hate to open up another can of database-worms, but under 17.1 (local databases), she notes: "Also include each ebook vendor's databases (ABDO, Freading, Zinio, Axis 360)." I've read up on everyone's thoughts concerning Freading and Zinio, but is it valid to say that Axis 360 is a database? I know libraries order eBooks from Axis 360, but it's my understanding that those items have to be checked out and should count in the circ stats. It is very possible that I don't understand how Axis 360 works.

Also, if she counts Freading as a database, can she use the numbers from it for her circ stats (she's doing this now)?

3. Can we add a question that measures wackadoodle reporting practices by library systems? I'll be happy to craft a definition!

SDC Comments

Susan Mark (WY)

1. No, no, no. In short, no.

2. Have no experience with Axis 360, but I'm struggling with the Freading one. Since the agreement was it's a database, my assumption was that we did not count it as circ. However, it sounds as if some people are. Freading is a significant piece of our ebook offerings, and I believe it should be counted as electronic circ, but my understanding of the definitions was that I should not. I find myself in the position the OverDrive people were in for so long when we weren't counting those as ebooks thanks to the OPAC requirement.

3. Most wackadoodle one I've had was from a system that had a lot of very territorial communities who were counting things sent from one branch to another as ILL.

When we draft the wackadoodle one, do we include the stapler to the forehead scale?

Michael Golrick (LA)

I had to laugh at your last remark, Joy!

Here is what I have in my notes for folks for Axis 360: "Report collection in [8.5], Circulation in [6.1], and Expenditure [13.9]." Now, those numbers in brackets are for the Louisiana report...but what this says to me is that these are true e-books, and not like Freegal where they are not ever "returned." I have it on my list after talking with one of my "peeps" (who is at the largest public library in the state, and who does a great and diligent [but not obsessive] job with the statistics). I listened to her description, and wrote my rule that way.

My basic rule is that databases have their use counted in one place, and items in the collection have their use counted in circulation. It is not right to mix and match. (Or to be really snarky, "You can't have it both ways.")

The tax form idea is definitely high on the wackadoodle scale. There are days when I would rather have wackadoodle than non-respondents. With my survey set to close in about a week, I have over a quarter who have not yet started.

Joy Garretson (MS)

Thanks y'all!

I'm happy to have crazy respondents, too. I like the idea of tying in the stapler-to-the-head as part of the craziness rating scale. Maybe we can compile a list of the craziest reporting practices in a breakout session at SDC Conf. 2014! (A girl can dream!)

As far as Freading goes, I think I'm going to count it as a database since the items are accessed but not checked out. I'm interested in seeing where the official definition will fall on this one.

Ann Reed (OR)

.... And she cataloged the tax forms so they are part of the permanent collection? Otherwise, every article printed, web page accessed or newspaper read would be "circ". Sounds like she needs shock therapy. I got the idea for this from Patience. Most folk in smaller libraries try to pad their circulation, thinking that if it's always going up, its good. Patience has workshops where she "reads" a library's data and then explains the conclusions she draws from it. I may have adapted a bit - I usually read, then note budget cuts, hour cuts, etc. If the library's circ data still goes up, I act like a city official and note

that my cuts have done no harm, and actually, could cut more from the library without consequence, as various inputs don't affect circ. Hee hee, most never thought about the issue from that perspective.

I wonder if we may need "try to commit seppuku with letter opener". I haven't gotten that far yet, but I've used the stapler enough that I may need to escalate.

Stacey Malek (TX)

I've been meaning to post this for a while but was hoping to have some additional information for the group.

Based on what a couple of the other states had done, we provided our libraries with a guide on how to count downloadables this year. We thought it would make things easier for them. Well, I got major pushback on how we are asking them to count Freading. The main concern I heard is that they cannot show their governing authorities that they have ebooks for patrons. I gave them my explanation about why it's a database and that did not satisfy them. I also got some pushback on Tumblebooks and Bookflix, since those products also contain ebooks that they wanted to count.

So, I contacted the vendors to find out how these products work and what statistics they provide to the libraries. Based on those conversations, I think we are good on Tumblebooks and Bookflix as databases. These are not downloadable ebooks and the statistics provided libraries is very similar to what our database vendors provide.

I also contacted Library Ideas, the company that runs Freading/Freegal. I spoke to one of their sales reps. He told me that participating libraries have access to over 40,000 ebook titles in their catalog. The libraries set their own budget and either place funds in escrow with Library Ideas or are billed monthly (up to the library) for all patron downloads. Once they hit their budget limit, patrons can no longer download. Ebooks cost between \$.50 and \$2.00 and libraries are provided with a report/invoice each month that lists the titles, how many downloads it had, and the cost. Freegal is similar, but there is also a streaming option that may become available for their ebooks. I have tried, unsuccessfully, to follow up with someone else there to confirm the type of statistics that are provided to the libraries. The sales rep wasn't sure if more was provided than what I described above. I will be following up soon and will let the group know what I find out.

I don't think we would want to count all 40,000 ebook titles that the patrons have access to, but if the libraries get a report that shows which titles were downloaded and how many times, could we count those "units" as part of ebooks and then count the circulation for them? Could we do the same for Freegal downloads?

I did not contact Axis360, or some of the others on our downloadables list, because I was able to find out enough about their product on their websites that I thought we were counting it correctly.

IPLAR question

April 3, 2014

Question

Robert Jones (IL)

Thoughts? See below.... (a forwarded question from a public library in IL)

Robert,

A question about where a stat is best suited. We have a kids educational gaming computer. All the games are fun but based on developing learning skills. It is is preloaded games no Internet access. Where would I record the number of users? Would you think it is children's programming? computer use? both? I feel it is a number I should record somewhere just not sure where. Thanks for your help. ...jill

SDC Comments

Susan Mark (WY)

Definition says uses of internet computers. It's not connected to the internet, so wouldn't (theoretically) be counted as a use.

Whether the average library is abiding by that distinction, however, is a whole different issue.

This sounds like a count it locally and brag on it if you want thing.

Robert Jones (IL)

I agree. R.

Laura Jones (AZ)

Concur.

Jamie McCanless (WI)

In Wisconsin, we collect both the number of public use computers and the number of public use computers connected to the Internet. Here, then, I would count kids educational gaming computers in the former but not the latter (basically, what Susan just wrote). The gaming computers wouldn't be included in children's programming without there being a "group attending".

Ann Reed (OR)

Tritto!

Beth Bisbano (PA)

Just curious and I'm not real savvy with tech details, but how are you pulling in the number of users for this particular computer set up? I think I understand how internet users are collected, but I'm not clear on this process.

And to go a step further, some of our libraries have Job Centers where people use the computers to type up resumes. I'm guessing that would be a similar case.

Thanks

Joyce Chapman (NC)

According to my library directors, the AWE computers and tablets track metrics and have reporting capabilities so it's really easy to get the usage statistics. AWE stations are what we have in NC, not sure if that's what you've got too <http://www.awelearning.com/en/markets/libraries/publiclibraries/>. There are a lot of AWE computers throughout our state, many of them funded with LSTA money by the State Library. It's really too bad that usage data has not been tracked over time for these. Particularly at this moment, since our new governor is very interested in early literacy and it would have been a useful statistic to be able to incorporate into our discussion about what public libraries are doing to support that.

We are probably going to add local questions on our PLS next year to track the number of early literacy stations and their usage statistics.

Robert Jones (IL)

We here in Illinois very well may do the same.

Program stat question

April 3, 2014

Question

Ann Reed (OR)

This is a new one....

I would consider a one-on-one tutoring or assistance to be reference. If the date/time were advertised or posted I would then count it as one program with one attendee.

Now, is the appointment reference when the person helping is not on library staff? I'm thinking yes, it still counts as reference. You have a patron with an information need, a tool (the computer) and a knowledgeable person at least affiliated with the library. I bear in mind that shelvees often answer lower level reference questions out in the stacks.

Is this your read on it??

SDC Comments

Joseph Hamlin (MI)

My take is that I would only consider one on one tutoring to be reference if the tutor was provided by the library. I wouldn't count it at all (beyond Library Visits) if a unaffiliated tutor (Patron) and a student (Patron) decided to meet at the local library for sessions.

Thanks.

Diana Very (GA)

Hi Ann,

I would say that a reference transaction only counts when that person is working as a library staff or volunteer. If a non-librarian is providing one-on-one tutoring by appointment and it's not a service program, then it wouldn't be counted as a program, service, or reference transaction.

Maybe I'm misunderstanding the situation.

Robert Geizler (VT)

Hi Diana,

I agree with your analysis. If this is a volunteer unrelated to the library working with a student, and there's nothing more than the use of library space, you get to add 2 to the door count.

Ann Reed (OR)

Thanks all!

I think we are on the same page.

Joyce Chapman (NC)

"We recently transitioned from drop-in computer labs to one-on-one appointments with volunteer tech tutors for people who want computer assistance. We also now offer one-on-one homework help with volunteers by appointment."

The people offering the assistance are affiliated with the library. They are library volunteers who are there specifically to help with one-on-one computer and homework tutoring. That sounds like reference to me.

Clarification on Reference Transactions

April 9, 2014

Question

Katrice Stewart (FL)

So, I have a fellow data lover in one of our county systems who is great about playing devil's advocate when thinking data elements through and she has brought a questions for clarification to my attention.

In reading the work of the definitions committee to iron out the wrinkles of "reference transactions", when the phrase "**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.**", does the term **unscheduled** strictly mean an impromptu session without any scheduling at all or can a reference transaction also include an appointment made with the reference librarian for help with something, say e-books?

Please forgive me if I've not copied the latest verbiage for the definition as there are several "final" documents on the wiki. I pulled this one from the "final grammatical revisions – Reference Transaction s – Final – rev2.docx" file.

Thanks so much!

SDC Comments

Michael Golrick (LA)

My intention in agreeing to this language is that this was meant to specifically exclude classes, but to make it clear that when I help someone with a web site (or sites), like filling out the ACA forms or registering for SNAP (food stamps), that counts as a reference transaction. Speaking only for myself, I did not think about "scheduled reference transactions." That is solely a reflection of my personal experience at reference desks in generally fairly busy public libraries where we do not make appointments for help.

Scott Dermont (IA)

Some reference desks are definitely busier than others.

The way I would look at this is:

If a patron called and said: "Will you be able to meet me at 1pm today? I need some help with my new e-book." I would call this meeting a reference transaction.

If the library said: "Please sign up for one-on-one e-book sessions scheduled for 1pm today." I would call this meeting a class, and not a reference transaction.

Maybe this is picking nits or splitting hairs. But it seems like if it is a patron generated request for one-on-one help, then it should be reference. If it is a library scheduled event, even if only for one person at a time, then I wouldn't call it reference.

Susan Mark (WY)

patron-initiated vs. library scheduled is a good distinction.

Katrice Stewart (FL)

Thanks Scott! Great suggestion.

Katrice Stewart (FL)

I like it! Seems to make perfect sense to me. (in response to Susan)

Ann Reed (OR)

Nods

Kathy Sheppard (SC)

We are discussing this same issue here in South Carolina from the program count angle rather than as a reference issue. One of my libraries called with that exact example of e-book assistance, where people sign up for a particular time to receive one-to-one assistance within a scheduled period. It seems this happens quite a lot.

The definition of a program specifically excludes one-to-one assistance. So, if one-to-one assistance cannot be considered a program, doesn't it follow that these people are actually signing up for one-to-one reference assistance? Even if the library invites them to sign up, as for a program, the format is undeniably one-to-one and contrary to the definition.

Like the rest of you, I am leaning toward counting this kind of activity in terms of the overall aim of the activity, i.e. to convey information to a group of people, and forget about the manner in which the program is conducted (i.e. not take the one-to-oneness into account). Count as one program, conveying a certain type of information, to an audience (who just happen to arrive at different times.) The signups are counted individually as program attendees. But the definition continues to be a problem.

July 19, 2016

We're having real difficulty here with many examples of training, programs, and like activities this year. I will likely need to bring up a few for discussion at our meeting.

Help on stats question: how to track reference questions answered by trained volunteers

May 5, 2014

Question

Joyce Chapman (NC)

I just got this (below) from a library director. These are volunteers, not library staff, performing the work. I have another question from a director similarly asking how to track reference questions answered by trained volunteers (they have a set of volunteers who specifically help with technology). Thoughts?

“A couple of our libraries partner with AARP to offer tax assistance. They recruit and train volunteers to help people file their taxes (it’s not just for seniors, but they do have to be NC residents). We provide the facility (at Macon, they use our meeting room two full days per week) and our IT Dept. works with them to provide the secure access they need for filing. We also schedule the appointments for people and give them the information they need for their appointment (what to bring, who to bring, who is eligible, etc.).

We’ve been uncertain how to count this service for the statistical report. Is it a program (a series of programs)? Does one day count as one program? In any given day, there might be 30 different tax sessions, so should we count that as 30? How should we count program attendance? Should we just count the people getting their taxes done? Or should we include the people who are receiving service (who may not be present at the time of the tax appointment)? Do we count the volunteers providing the tax assistance? What about the people who made inquiries and we were unable to help (they didn’t have the right documents, their tax filing was out of scope for the volunteers, or they just didn’t show up)?

Or is patron assistance? The definition for that specifically says “one-on-one staff interactions with patrons...” But the AARP volunteers are really the ones doing the one-on-one, not staff (though staff also interact with these patrons as part of making the appointment to have their taxes done).

Or is it meeting room use? I guess we could count this as meeting room use (non-library), but that doesn’t seem right. The library is a partner, not just a host. We help promote this service through all of our media and social media outlets. We even did a feature on our tax assistance service this year: <http://fontanalib.libguides.com/taxes>.”

SDC Comments

Michael Golrick (LA)

I am guessing that there are many libraries which do this. I have told my libraries that it does count as meeting room use, but does not count for the statistics which I gather. In most places, it is pretty clear that the program is AARP sponsored and that they are taking any liability for the volunteer advice.

That's my quick take in my first post-lunch look at it.

Scott Dermont (IA)

I agree with Michael. I don't think this is a program, and it is not a reference transaction.

Joyce Chapman (NC)

Thanks guys. What about the volunteers the library has trained to answer technology reference questions (they come in and provide one-on-one assistance during particular times), do those count in the reference stats if it isn't paid staff?

Michael Golrick (LA)

Ah...this is a horse of a different color. If the volunteers weren't/aren't available then this is something that the paid staff would do, and would be counted as a Reference Transaction. So, I would say to count it. The Library has invested in the training of the staff (volunteer and paid), and they are providing a service where there is no reason to count what the paid staff do separately from what the volunteers do.

Cathy Van Hoy (OK)

Yep I agree with Michael - volunteer tech help is reference transaction.

Scott Dermont (IA)

Ah, but if this is important enough to be called a reference transaction, then why aren't the paid staff doing it? As a long time reference librarian, it is disheartening for me to see other librarians abdicating professional (ie. reference) work to volunteers. Especially when the numbers show a constant decline of reference transactions. I have a volunteer question on my survey, and I think I would have them report it there rather than as reference. Even with that in mind, I don't see this as a reference transaction. It is more like a one on one workshop opportunity. The scheduled hours, for me, separate it from that of a reference transaction.

Darla Gunning (CA)

It is my understanding that the intent of this question (and many others on the survey) is to track the activity that the library is handling and not who (classification level) is addressing it. Do we also then ask if programming, cataloging, etc is only conducted by paid/professional staff? And to be perfectly honest some volunteers may be much more qualified than some librarians I know to handle technology related questions. I am sure not a popular thing to say, but true none the less. Just my two cents!

Scott Dermont (IA)

From our new definition:

“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.”

The term “library staff” means “paid staff” to me. Our definition is loose enough to say that any library staff can be counted when providing reference service. So we aren’t saying it has to be provided by reference librarians to count. So I don’t feel like I am putting a staff classification on the work. But why specify library staff in the definition if we are to count reference transactions provided by any source? Maybe we need to change our wording again. Or we need to make it clear that volunteers are to be considered staff for survey purposes. I admit that this isn’t clear to me.

Once again, even with that said, I don’t see this as a reference transaction. Joyce said “they come in and provide one-on-one assistance during particular times.” My understanding is that does not fit the definition of reference transaction whether taught by paid staff or volunteers. From the new definition: “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).”

So, the fact that they are scheduled, one on one sessions, means that they shouldn’t be counted as reference. At least, I thought that was the intent of the clause. So in my mind, that even takes precedence over the “library staff” issue.

Michael Golrick (LA)

I understand what Scott is saying. I read the question differently in that my mental image was that there were volunteers scheduled to come in at heavy use times to help with tech issues. While it is true, that I prefer to think of “library staff” as “paid staff,” I know that in many smaller libraries, that will simply not happen. So I read this as “unscheduled” from the start. That may be the critical question for Joyce to be sure she understands while giving guidance. I agree that if they are scheduled, they are not reference transactions, no matter who is doing them.

Good luck Joyce!

Scott Dermont (IA)

But I think you make a good point Michael, and so does Darla. What is the intent of this element? What if the question from a library is: “We have reassigned our reference librarians and now staff the reference desk completely with unpaid volunteers. Do I count those transactions as reference?” My interpretation of the current definition tells me that I should say no in this case. That is why I think it is important that we clarify that volunteers are staff or not. Clearly the IMLS definition of public libraries excludes libraries that are completely staffed by volunteers. So, in my mind, “library staff” = “paid staff” for the purposes of the survey. Making “library staff” = “paid staff” + “volunteers” may bring up some other questions that will need to be addressed.

Maybe this is something that IMLS needs to weigh in on. What do they need? If volunteers are able to do the work of reference librarians, why can't we consider volunteer run public libraries as an official public library? In my mind there is a question of quality of service. But the survey is about quantitative analysis and not qualitative.

As I think I've said before, I am a librarian not a statistician. I hate to see the cheapening of my profession by replacing trained "library staff" with volunteers. By counting everything regardless of classification, I think it hastens the demise of librarianship as a profession and encourages the view that libraries can be run by cashiers and volunteers. We are actually in a position to keep that from happening with something as simple as an annual survey data element definition. OK, I'm stepping down from my soapbox now.

Laura Stone (AZ)

I'll jump on that soapbox now.

I think your question hints at something bigger than the intent of this element: the intent of the survey.

I see a tension between states collecting information from libraries to ensure that they are meeting certain standards AND states that collect information from libraries to understand what's going on in libraryland. My hunch is that those states that have significant state aid and certification programs tend to the former. And those with little aid and no certification lean toward the latter. And probably many of us have some version of mixed motives!

I have great admiration (okay, and envy) for those states that offer robust state aid, and have put in place certification programs that set benchmarks for libraries. Scott, as a dues-paying ALA and PLA member with an ALA-certified master's, I appreciate what you're saying: By counting everything regardless of classification, I think it hastens the demise of librarianship as a profession and encourages the view that libraries can be run by cashiers and volunteers. We are actually in a position to keep that from happening with something as simple as an annual survey data element definition, you've lost me.

However, I don't think our role as State Data Coordinators is to advocate for maintaining librarianship as a profession. The IMLS website says "Purpose: Public Libraries Survey (PLS) provides statistics on the status of public libraries in the United States." The website then says the "data are used for planning, research, evaluation, and policymaking decisions by federal, state and local officials, professional associations, researchers, educators, local practitioners, and other interested users."

To that end, don't we want to understand the big picture of what's going on? I agree that it's a challenge for us to do this because of the nature of the survey -- we can't easily decide to ask how many reference questions are being answered by volunteers (unpaid) vs. interns (paid or unpaid) vs. paras (paid) vs. professional staff (paid). But to decide that it's not a reference question because it's answered by unpaid "staff" seems to provide a limited view of what is going on in libraries these days. (As an aside, I'd like to know if the outcomes for the users change based on who is answering the question -- which is not a question we can answer with our survey as is.)

This plays out in lots more ways than just reference. This ties into our discussions about whether we should be counting outlet-lites, and how to deal with entities that are almost, but not quite. What's the difference to policy makers between a planned-by-library-staff speaker program, and the library agreeing to waive the room rental fee so that the local genealogy group can host a speaker open to the public at no charge?

Perhaps we need to talk more about why we're doing this survey on a national basis, and talk about how that plays out given all the different realities we face in our states, as well as national data needs. I think the definitions are very important, and once adopted, we all need to do our best to adhere to them. I'd just like them to be big tent definitions.

Okay, enough on this soap box!

Happy Tuesday All.

Beth Bisbano (PA)

I totally agree with Darla and Laura on this. It's about the "what" not the "who".

Scott Dermont (IA)

Hi Laura,

I do get your point, and I do try to look at this as neutrally as possible. But it is hard for me sometimes to stand idly by as the institution and profession that we are antiseptically categorizing withers away. Especially when we are in a position to help that institution. My role at the State Library of Iowa is one of education and advocacy. So it is hard for me to shut that down when I put on my SDC hat.

Going back to the original post, I still think that Joyce's situation would not be considered a reference transaction (that is what started this after all). I believe the intent of our definition was to exclude scheduled, one on one sessions, which is what it sounds like Joyce's library is doing. So whether done by volunteers, or paid, professional reference librarians, I would not count this as reference.

More database woes...

May 7, 2014

Question

Joy Garretson (MS)

I'm about to send a lengthy message to one of my library directors about her counting methods. I know how to deal with most of the questions I have regarding her report, but I'm concerned about her database definitions. My main problem is that she counts Polaris (an ILS) as a database. This is not what the feds mean by databases, correct? I'm guessing that the "bibliographic records" part is where she justifies it, but I just wanted to check with everyone else before entering into the fray.

SDC Comments

Susan Mark (WY)

ILS is not a database. Nope.

Michael Golrick (LA)

.... no. I guess it is a database, in a broad scope. Look at the language in the definition (page 52 this year, and right before the data elements 456-458). I know that language must have been written to keep libraries from counting the ILS as a database.

Terry Blauvelt (MO)

In reality, all ILS are databases, but they should in no circumstance be counted as such.

Colleen Hamer (MT)

Yes, and Licensed Databases is a subsection to "Library Collection" which has in its overarching definition "Under this category, report only items the library has acquired as part of the collection, ..." and the cost of the ILS would likely be under Operating Expenditure not Collection Expenditure.. another indicator for what could be in the collection #s.

Nicolle Steffen (CO)

I had a public library director ask the same question this year. She wanted to count her new ILS as a database because it had expanded content, including book and media reviews. I saw her point.

However, I told her not to count the ILS as a database because, although it was “a collection of electronically stored data or unit records,” it wasn’t in keeping with the intent of the data element.

Joy Garretson (MS)

Thanks everyone!

Ann Reed (OR)

Lol, an ILS IS a Database by definition. If we had meant to count only ones with periodicals, we should have said so. Mine is the minority opinion on this.

Scott Dermont (IA)

I don’t think we should count ILS as a database on the survey. But I think an ILS fits the definition almost perfectly. If we don’t want it included in the count, we should probably add some clarifications to that effect. I have done that on my survey.

Mary Ann Van Cura (MN)

Scott, I like your suggestion a lot. It would provide clarity

Joyce Chapman (NC)

And while we’re on the topic, does anyone find this question to be useful in some way, or was it historically useful? The info it conveys is kind of like me telling you how many Tupperware containers I have in my kitchen. It tells you nothing about how much stuff or what type of stuff is inside these containers. And we aren’t even reporting usage stats for them.

Nicolle Steffen (CO)

Agreed.

Kathy Sheppard (SC)

I have always wondered why we ask this. Better data might be, how much or what % a library is spending on databases. But because the State (at least our state) makes the really big database purchases, this seems kinda useless.

The problem with reporting hits, here in SC again, is pulling down the reports. We seem to have difficulty getting these figures annually, maybe because of a vacancy in that department. I wonder if the usage count has been discussed in the past?

Laura Stone (AZ)

I agree with Joyce, as well. On a library-by-library level, I'm able to eyeball the data and get some idea of how much additional material is being purchased in different parts of our state. But the numbers are too squishy to track trends with, and they don't roll up into statewide totals. Trying to get usage numbers is a real challenge. Even our State Library staff member who manages our statewide databases is continually frustrated at trying to figure out usage – patrons can come through a state portal or through their library site, and the data looks different in these different environs.

Michael Golrick

I am guessing that the reason for asking goes back to the days of the beginning of libraries offering the service, and pre-dates the statewide services that many states have.

I *do* ask my libraries to report the usage figures for the databases which they purchase. (I have the statewide numbers, library by library ... well sort of.)

Nailing down database usage statistics is a morass. (And have you ever tried to nail down a morass?) What I would love is for Susan Hildreth, as head of the IMLS, to get all of the database vendors into one room, read them the riot act about how libraries of all types need to have numbers which can be compared between vendors, and not let them out until each and every one of them signs saying that they will regularly deliver library-by-library statistics which meet the NISO standards – which they helped write!

Until that happens, I have a mess of numbers for all the Louisiana libraries.

It occurs to me that this data element group (456 – 458) could be a candidate for deletion. I am going to be bold and suggest that to the LSWG – which includes researchers who presumably use our numbers.

Joyce Chapman (NC)

I second the motion.

Mary Ann Van Cura (MN)

I'll vote for that.

Susan Mark (WY)

I think this is one we might be collecting more on a philosophical basis than a practical one. After all, libraries are doing more with electronic resources. However, since we're not tracking actual use, just availability, couldn't we get the basic gist of the move to electronic resources by means of the electronic materials expenditures + the data in the state library survey?

Doing away with these would certainly eliminate the whole discussion of "what's a database?" and leave us free to wrestle with ebooks. At least with ebooks, we have some reasonable way of tracking use.

We have used the local database number before to justify the state databases -- eg. "X number of libraries are completely reliant on state databases." If we wanted to continue to be able to say that, we could do a state data element that's a simple yes/no instead of asking them for the number.

Scott Dermont (IA)

I agree that we need to evaluate what we are counting. I'd say 80-90% of our libraries only have state supported databases. So, really, what is the point in counting that other than to over inflate the state wide numbers?

Mary Ann Van Cura (MN)

Those of you with years of experience may have another point of view of this.

To paint a picture of the services libraries are providing, I like the idea of showing:

- number of electronic resources by format (databases, ebooks, etc.)
 - source of funding for the electronic resources by format (e.g. state, regional, local)
 - usage statistics (e.g. database usage, electronic resource circulation, etc.)
-

Cecilie Maynor (TN)

That is true for Tennessee as well. Very few libraries have locally supported data bases to report. We plug in the state number for each (so it is inflated and not very useful).

I agree that an evaluation of each question would be good.

Susan Mark (WY)

For our state-level reports, we don't sum the state databases, so there's no inflation on what we release. Nor do we sum the state-purchased e-content. We don't have control over how it's handled on the federal reports, though.

Nicolle Steffen (CO)

It's a tricky issue. I think it's important to capture the data associated with databases because they are an important library resources, but I've often questioned whether we are collecting the right data.

In Colorado, we have no "state" (457) funded databases. However, we do have a consortium that negotiates a consortial purchase for libraries statewide. No state funding is put towards the consortial purchase, so the databases are reported under "Local/Other cooperative agreements" (456) making that data marginally useful locally.

Susan Mark (WY)

I concur, Nicolle, but that puts us up against another set of what may still be insurmountable problems. Even with the whole COUNTER thing, there still is not good consistency across the database stats we get back. So if we tried, say, to report out the number of sessions across all databases, it would be as if we counted all our oranges, sledgehammers and antique thimbles and said, "See! Here's how many oranges we have."

Is this even worth collecting at the national level if we have junk data? Looking at the supplemental tables for the FY11 preview, the totals have no relation to reality. We do not have 1,838 databases in this state.

Is there any way to recommend that IMLS find some other way to report e-resources out at the national level other than by totaling? Median resources per library by state & nationally, and also maybe by library size would make more sense to me. The value in e-resources is not the grand (inaccurate) total, but what is available to patrons at their local library.

Nicolle Steffen (CO)

Susan, for all the reasons you pointed out, I like your idea of reporting "Median resources per library by state & nationally."

Joyce Chapman (NC)

Personally I would rather have a wildly inaccurate count of database usage than no count at all. And that's exactly what we do with reference transactions. We all know they're wildly inaccurate. Even if I can't be 100% positive that the numbers are correct or libraries are counting the same way, I can be 100% positive that no count at all is more harmful than helpful to them in advocating for libraries, understanding their users, and identifying trends over time.

NC will probably start collecting it locally soon, but I'm sure in 5 years we're all going to be cursing ourselves for not having started to collect this info at a national level earlier. I think if we add some questions around database usage to the survey it provides a means to start forcing the vendors to provide the necessary statistics. So we'll get a few years of crazy and missing data, then vendors pull their act together and we start getting something as consistently accurate as... reference transactions ☺

Susan Mark (WY)

I'm leaning toward agreement, Joyce, but the other factor to consider is that since so many databases are purchased at the state or consortial level, there may be literally no way to report this by individual library.

Looking at just one of our state databases -- Chilton's -- 1,793 of the 3,432 searches were done remotely -- so no idea what library the users were from. Not saying this to shoot it down, but I'm struggling with how we tease that out realistically?

That said, as I recall, most of my database stats are at site-level, so we could at least capture the number of people accessing them on-site, although I suspect many, if not most, in the public libraries are librarians looking up a reference answer.

This will also be less of a headache for me to deal with, because I don't have hundreds of libraries and who knows how many regional consortia buying databases.

Really not trying to shoot this down, because I think it's important. There are just a lot of issues to work through that I think we need to lay out here.

Nicolle Steffen (CO)

Joyce, your comparison to reference transactions is spot-on, IMHO.

We've had similar discussions here about counting database usage at the state level with all the pros and cons discussed ad infinitum, but no definitive solution, unfortunately. In fact, it looks like we'll be reviving the discussion with public library directors at a meeting at the end of the month.

Like Susan, I'm not trying to shoot anything down, rather I'd like to see us find a reasonable methodology for counting databases and their use. But, then who isn't looking for that?!

Robert Jones (IL)

I still think counting reference transactions should have went bye-bye but I'm in the minority on this one. The whole idea of accepting "inaccurate" data versus "no data" troubles me.....(and I'm from Illinois!).

Michael Golrick (LA)

Every state is different. (We all agree on that, right?) For the databases which my state gets consortially, one of the things we get is a breakdown of use by library. I know that because that is a part of what I get to deal with more than annually. The database vendors can do this. They may not like it, but they can do it. They require authentication (IP address sometimes, library card at others) and get it from us.

What passes for statistics *from* them varies. Sometimes we get “sessions”, sometimes “log-ins”, sometimes “searches.”

In my ideal dream world, someone (like Susan Hildreth, as head of IMLS – while there is still a librarian there who understands our needs intimately) would get the database vendors a room (at ALA Annual?) and tell them to give us uniform statistics which we can compare and combine as we see fit. If they want to give us other fancy stats which they think make them look good, so be it. They would have the freedom to do so. Just like I tell my libraries, “you can count and report to your board/governing authorities whatever you want, as long as you collect and report the data for which I am asking you.”

I think it is important data. I have it for the state-wide databases in my purview, and this state has been asking for use data for locally provided databases for at least as long as we have been collecting statistics electronically (2004).

Counting Items loaded on loaned-out E-Readers

May 12, 2014

Question

Joy Garretson (MS)

I have a director that circulates 6 Kindles, each loaded with about 160 e-books/each. How do I could those e-books? As a simple 160, or as 960 (160 x 6)? If this director was able to circulate 6 copies of each book in paper format, I would report 960, but I don't know what the norm is for counting items circulated on e-Readers. At any rate, I thought I'd throw it out to you and see what you do. Thanks!

SDC Comments

Susan Mark (WY)

So the patron checks out a Kindle? I would count that as one circ each time a Kindle goes out. Kind of like if you're checking out a laptop.

Peter Haxton (KS)

I agree with Susan. The Kindle is the item being checked out.

Michael Golrick (LA)

I would concur also. Count the device. If it were a Playaway (brand name for a particular product) that had more than one title, you would only count it once. (Because of a grant, we are collecting "device circulation" as a discrete data item for our state survey.)

Joy Garretson (MS)

Gotcha. Thanks!

Kathy Sheppard (SC)

The thing is...the patron is actually getting 160 readable items, regardless of the package they come in. I do see the analogy with the Playaway. Does the fact that the library is pre-loading the titles (making the choice for the patron) make the difference? What would you do if the patron selected the titles, and there were only three of them?

Maybe a little more discussion as we certainly will see more of this kind of circulation.

Jamie McCanless (WI)

I refer to the part of the PLS definition for [552 Circulation of Electronic Materials](#) that reads “Electronic Materials packaged together as a unit and checked out as a unit are counted as one unit.” So here, checking out an e-reader counts as one circulation, regardless of how many e-books have been loaded onto it.

Where to count public services activities that are system-wide, & not outlet-specific

May 27, 2014

Question

MaryAnn VanCura (MN)

I could use some advice on where libraries should count public services activities that are system-wide, and not outlet-specific.

- Some multi-outlet libraries have been counting system-wide public services offerings in their “Office Outlet”. Since we don’t plan to include the Office Outlet in the upload to WebPLUS, I need to advise these libraries how to enter this data.
- I can ask them to move the system-wide public service activities to the library outlet of their choice (central or branch), but some are interested in being able to show which activities are system-wide versus which are outlet-based.
- How have others handled this situation? Any suggestions?

SDC Comments

Katrice Stewart (FL)

I deal with this type of scenario very frequently as we have many “cooperatives” who are providing services at this higher level. What we’ve done to accommodate everyone is to set up an administrative/cooperative office location in the statistical software so they can separately report these activities then I roll that total together with the other location(s) to give a grand total. This seems to work well until you get into a situation such as Edge or other survey reporting where they use the FSCS numbers to organize reporting. Doing so will prevent the more granular level (i.e. the library separated out from the “administrative office” totals. That being said, for this type of arrangement it really isn’t an issue since, in all material respects, they really should be reported together.

Hope this helps.

Data element 503: registered users

June 12, 2014

Question

Susan Mark (WY)

There was a question on the registered users data element regarding libraries that purge every two years instead of the standard three, who wanted to go back and reclaim those third-year users.

From the data definitions committee perspective, there appear to be the 5 options below. The committee is not moving forward with proposing any changes to this data element at this time. We are throwing it out to the wider list for review and any discussion.

As always, any SDC can propose a data element change/addition/deletion if you feel strongly that this data element needs improvement.

Option 1: Revise "registered users" to "active users." Define "active users" as someone who has checked out an item in the past three years.

Pros:

- More consistent measure from library to library, as local libraries use different purging schedules
- Arguably a better measure of library use and support.

Cons:

- Breaks with 20+ years of data collection under old definition -- the two are not comparable
- Takes library card holders out of the stats if they use their card to access computers, wifi, and databases but don't check out materials.
- Potential problems if some ILS systems don't track this well
- Collective screams of 9,000+ libraries as their stats take a dive

Option 2: Add an "active users" data element, defined as someone who has checked out materials in the past three years.

Pros:

- Gives us a better handle on actual activity

Cons:

- Another data element adds to reporting burden
- Again, leaves out cardholders actively using non-collection resources

Option 3: Leave it be, but recommend a purging schedule, as in not just how often, but as in how long an inactive patron should stay on the books before being kicked off.

Pros:

- Recommended purging schedule might bring better consistency.

- Does not break with past data collection.

Cons:

- Treads into dangerous territory of us telling them HOW to run their libraries.
- And will they listen to us on that one, anyway?

Option 4: Leave it be. Quietly advise the two-year purgers that yes, go ahead and add back in the third-year people even if they're not on the books.

Option 5: Leave it be. Tell the rare two-year purgers tough cookies.

SDC Comments

Lauren Miklovic (RI)

Our pesky consortium (of which every public library is a member) does this on a three year basis, and although I'd like to tell them what to do quite often, I don't feel like I could really tell them to change their purging cycle. If the libraries themselves were responsible, I would have a lot more flexibility, but unfortunately that's not the case. For that reason alone, I'd recommend we just leave this alone- I guess that would be options 4 and 5?

Jamie McCanless (WI)

Of these five options, I'd have to respond "5. Leave it be." We can only recommend a particular period between purges, which doesn't always carry much weight here.

If total circulation in the PLS includes uses of downloadable content, then the number of registered users include those who only use their accounts for downloadable content and databases. Regardless of how often user records are purged, some number of active but online-only users are likely purged along with inactive users. While the number of online-only users is probably low, I believe it is growing. In other words, the data is already affected.

Before considering a change in how often libraries should purge user records, I'd want to know/discuss whether online-only users are counted among active and inactive registered users.

Wireless Questions

July 30, 2014

Question

Scott Dermont (IA)

I'm trying to figure out how we count wireless sessions. Are we counting total wireless or are we just counting wireless sessions to patron owned devices? I'm asking for just patron owned on my survey, but now I'm wondering if this is wrong. It appears that the listing is not on the administrative entities list on the Wiki yet, so I'm not sure what the "official" definition is.

Thanks for the help.

SDC Comments

Diana Very (GA)

In Georgia we count the number of hits that the libraries receive to the WIFI connection. This is done by requiring a password, usually a common password, that is prominently posted in the library. Some require the library card number as the password. If the library does not count hits, I also have a question about the hours that the wireless access is available. Some answer 24/7 and some are only on during library open hours.

Hope this helps.

Scott Dermont (IA)

What I'm really trying to figure out is what the new federal definition is asking for. Are we trying to get the total number of wireless sessions, including library owned computers, or are we just trying to get wireless use by patron owned computers.

Katrice Stewart (FL)

My interpretation was that we were going to report *all* wireless sessions regardless of who the owner may be. If I'm wrong I'm hopeful others will chime in to set me straight J

Joyce Chapman (NC)

My interpretation (and what NC is reporting) is all wireless, doesn't matter who owns it.

Cathy Van Hoy (OK)

Same here in Oklahoma – all wireless sessions.

Juan Lee (UT)

In Utah I am using the same interpretation of ALL wireless sessions regardless of who owns the device.

Ann Reed (OR)

Ditto in Oregon. All wireless sessions.

Joseph Hamlin (MI)

In Michigan, we are also reporting all wireless sessions regardless of what or whose device is used to gain access, as long as the library provides the wireless.

Cecilie Maynor (TN)

I am glad this question came up as I had a similar question from some of our libraries last week. I guess I wasn't sure as I thought the intention of the question was to (eventually) get an overview of a service libraries offer to the public that we aren't capturing already in computer usage.

Liz Babbitt (MA)

And, Massachusetts is reporting all wireless sessions too.

Diana Very (GA)

Ours will be all wireless sessions, but all will have to use the password to connect. This won't matter which type of device is used.

Diana Very (GA)

Just received new information from my IT Director. The computers in the library are hard wired and will not count on the Wireless count. If they own a mobile lab with laptops, those will count on the Wireless. There are two types of connections working here. The wireless and the hard wired. So, in Georgia, we will only count the number of hits that use the wireless and not the uses of the hard wired computers in the library.

Susan Mark (WY)

I'm not sure it's even technically feasible to split them out. It's going to be hard enough getting them to count wireless sessions, period.

And I see nothing in the definition that differentiates.

Joyce Chapman (NC)

That's what NC is doing too. Nothing hardwired would be counted in the reported wireless sessions. But if the library lends laptops or tablets, their use is counted alongside patron owned devices for wireless hits.

Scott Dermont (IA)

I think it is really clear that most of you are counting total wireless. I need to fix my definition. I agree that it would be really hard to separate total from patron only. I'm not sure what I was thinking. Well, actually what I was thinking was that we could say "Internet computer use" + "Wireless Use" = "Total." But really, I now see that these are two completely different service measures. Maybe we should clarify the federal definition a bit so we don't need to interpret what is being asked for.

Cecilie Maynor (TN)

We have libraries (not many) that run all their computers on wireless. We also have some libraries that use wireless cards in their stationary PCs for the public. I might be confusing these questions, but should these be counted as wireless instead of computer sessions? Or...are these separate?

Question about in-kind donations

August 7, 2014

Question

Diana Very (GA)

I have a question coming from a library about budget for their summer reading programs. The library received coupons from an ice cream store and from a pizza restaurant offering freebies or discounts if they completed the required reading. The library wants to add the value of these coupons to their budget as in-kind donations. I do not think that there is a measurable value to these coupons and don't think that the coupons should be added to the budget, even as in-kind donations, for the Public Library Survey.

How are you handling these in your states?

Thanks.

SDC Comments

Michael Golrick (LA)

I would agree with you. Data element #303 specifically says "Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts or donations." That is the Federal Definition (p. 46 of this year's book).

New Wireless Question

August 8, 2014

Question

Amy Heebner (NY)

Hello everyone! I am the new state data coordinator for New York.

We have already started counting wireless sessions but we have had questions about how to count the sessions. Some libraries may not be able to get statistics from their wireless provider. Some have asked if we can provide software to assist with statistics. Other libraries have said they count the number of people they see using their cell phone or laptop in the library.

I looked at Michigan's "Best Practices for Wireless Statistics," which was very helpful. I was wondering if anyone had any additional suggestions, and/or if your libraries have had difficulties getting statistics from their providers.

SDC Comments

Kathy Sheppard (SC)

Welcome, Amy!

We in South Carolina announced the new required count of wireless to our public libraries, and even emphasizing the optional first year, we immediately got a lot of panicked responses about how to get the count, the difficulty of and the cost of getting the count.

We haven't sent out much official guidance because aren't yet sure what advice to give, and we don't want to commit to anything we cannot guarantee, like funding for the software, or technology assistance that we may not be able to provide.

About half our libraries are already counting and comfortable with it. They see the necessity and they are able to take steps to make this a regular routine. The other half are either looking into it or worried about it. The State Library won't have a coordinated response for a little while, and we don't expect a 100% count this year or possibly even next. We too have libraries that only count the people they "see" using the wireless. (How exactly are they doing that ?!) So it's a work in progress.

Michigan's list of software products was a great help also to us.

This will make for good discussion at the conference in December.

Outreach at Farmer's Market at Program?

August 14, 2014

Question

Laura Stone (AZ)

A library director has asked me: "Where would outreach activities be recorded? For example at the Farmer's market we directly interacted with 28 persons answering questions about the library and its services."

The definition for program includes programs "whether held on- or off-site, that are sponsored or co-sponsored by the library." I'm sure the library is not sponsoring the Farmer's Market – however, the library is sponsoring staff participation in the booth.

What do you think?

SDC Comments

Carole Suzui (HI)

The Hawaii State Public Library System has a booth at certain community events like the annual Book and Music Festival and the College and Career Fair. The booth is manned by library staff from the different branches. They distribute bookmarks, flyers, and give away book bags if people who stop by can show us their library card. We promote the programs and services at the libraries. We count these as outreach events. We count the number of people who stop by our booth as attendance.

Counting Wireless Usages versus Users

August 19, 2014

Question

Kathy Sheppard (SC)

Hi everyone,

Our libraries are investing in software to count wifi usage. We are still having trouble pinning down exactly what to count as “wifi usage.” The survey question does not specify what units are to be used in reporting usage, but the assumption is number of sessions...correct? That is, we are to report individual usages (sessions, logins, or hits to the wifi) and NOT individual users. I think that’s right and it makes sense, in just the same way we count public computer usage (sessions) and not individual users.

However: Some of the counting software – for example, Meraki (widely used here in SC) reports usage in terms of GB – my limited vocabulary translate that to “gigabytes of usage” – and also counts individual users, but does not report individual, independent sessions. So, a user may be using several times each day but only gets counted once.

The report below is from a Meraki installation, showing the individual “distinct clients” (users) and the usage (GB) for the time period. This library believes the report is showing only one instance of use per user but not any additional sessions by that same user. I haven’t seen the documentation yet, and we may need to call the vendor to translate the report.

I suspect every vendor has different terminology in their reports but perhaps they all mean the same thing. If vendors are reporting usage in different units of measure...and libraries are just picking up whatever the usage count may be...this is a problem.

Just wondered if anyone else is struggling to clarify this for each type of wifi counting software in use? Has anyone created a list of software vendors and how each one shows usage on their reports?

Will soon know more about wifi than I ever imagined.

Thanks for your thoughts on this.

SDC Comments

Susan Mark (WY)

Yes, sessions -- just like with computer use.

My opinion is that libraries whose software counts users instead of uses should do the best they can. I don't know about the rest of the list, but I have no problems with libraries counting users if that's all they can get. Slight undercount, but better than nothing. But I have gotten slightly lacksadaisical about such things in the last couple of years.

July 19, 2016

I think we haven't come up with a list or recommended tools because there are simply too many options out there for doing this. My sense is that it has to be the IT department's or person's call on how to do it.

Zinio, Freading - database or collection

August 27, 2014

Question

Forwarded from LSTAC listserv to SDC email list by Ann Reed (OR)

Diana Very (GA)

I'm having problems with these e-books databases. Tell me, again, what we decided. This is becoming a problem in Georgia in that they want to count the circ numbers as circulations and I tell them that they can't because it is database hits. Then they say, if I'm paying for it then I'm going to count it. I'm looking for something to stand on here so that I'll have a foundation from which they can shot me.

All help appreciated.

Thanks.

SDC Comments

Laura Stone (AZ)

I think we need to work on updating the definition so that we can count these.

Perhaps a starting point for a discussion would be to consider including all full publication downloads as collection and circulation. With Zinio and Freading, I'm downloading an entire magazine or book – not an excerpt as I would in a traditional database.

Susan Mark (WY)

I had sent this out to the data committee just this morning, but since the discussion on the main listserv is already headed this way, I'm going to throw it out to the whole list.

To me, there are two places where the rubber hits the road on e-content:

1. SOMEONE paid for it at some point, whether library, consortia, state library or donor
2. You can only get it at a library or with a library card.

SO - [I've attached something for comments.](#)

I believe Freegal would fall under the Audio-Downloadables by this definition. For Zinio, we'd probably have to exhume and freshen up the e-serials definition we killed not that long ago if we want it.

Freading, Zinio and Freegal all smell like e-content to me. They just do.

I took out gov docs, because those are all free and I believe it would confuse the issue.

Comments welcome.

Susan Mark (WY)

And if we pin down the e-content, I believe we can tighten up the [e-circ definition](#) simply by saying to only include items counted under our official e-content definitions.

Ann Reed (OR)

Lol, Freegal sounds and works to me as a database, you find what you want in a heap o stuff, download that bit of the heap and walk away – just like with Ebscohost.

But I occurs to me that I have a criteria here – whether the digital thing has to be “returned” to the library.

Michael Golrick (LA)

At around the same time that this (and related notes) started appearing, a conversation began among those of us on the definitions committee about a variation of this topic.

My initial reaction to Laura’s comment is that “limited time” needs to be considered. In my head, if you only get it for a certain time, then it is a circulation. If you get to download it and keep it (Freegal, articles from EBSCO, etc.) then, no matter its length/size, it is more like a database use rather than a circulation.

Laura Stone (AZ)

Oh, this is shaping up to be a Team Limited Time vs. Team Full Publication debate!

Susan Mark (WY)

I'm not wedded to the idea of Zinio or Freegal as e-content vs. database. There's a good argument to be made that they are databases, based on the fact that it's not limited time. I wouldn't go to the mat for either.

If the general feeling is that if they get to keep it, it's not e-circ, then that needs to be built into the definitions. Really think we need the clarity.

Michael Golrick (LA)

OK....I am going to the physical analogy. You borrow the whole book (even if you only read a chapter), and return it. That counts as a circulation. It goes back so someone else can use it. One simultaneous user.

If I download it today, and you download it tomorrow, and Susan downloads it a week from next Wednesday, how do those compare? We search, we find, we keep. Just like we do with an article from EBSCO... Multiple simultaneous users. I can post an email about this great article I read. (Actually...try this one: http://fistfuloftalent.com/2014/08/stop-teaching-people-give-feedback.html?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3A+FistfulOfTalent+%28Fistful+of+Talent%29 [I am not fond of the title, but it has some great ideas inside].) The web site will count each of your visits. If it were an article on EBSCO, we could all be looking at it at the same time (even if we are all in the same community).

So, I say, if you have to return it (or lose access to it), then it is a circulation. Otherwise, a database use, because the unit of purchase (I just love that concept) is access to all of the content, not to the use of any one specific item.

Terry Blauvelt (MO)

Since they don't neatly fit in either databases or collection, we may want to consider a new category that works better than putting a square peg in a round hole.

Ann Reed (OR)

Woot, I like that... if you get to keep it, it's not circulation.

Juan Lee (UT)

I will play devil's advocate for a second and ask... WHY do we need to count every single service? Is the patron interaction with Zinio and Freegal so prominent for libraries that we need to make a statement about it at the national level? By the way, what IS the statement we can make if we have that discrete data?

At the local level, SURE, collect the data and report it to your stakeholders. At the national level, do we really need to?

OK, I am done now... The devil made me say it!

Ann Reed (OR)

Hmm, so we boycott Zinio at the national level... I like....

Susan Mark (WY)

My feeling is we can only add Zinio if we bring back the e-serial data element. If someone wants to propose that one, they can. I don't have a strong opinion on Zinio one way or the other, and I'm not

going to propose it. I am going to formally propose changes to the e-content and e-circ data elements based on what I sent out earlier, and the feedback from the list.

Freegal may, at this time, be countable under the audio downloads data element. At least, I see nothing that forbids it. It sounds as if people think of it more as a database than circulating e-content, so that needs to be clarified one way or the other.

Terry Blauvelt (MO)

I think it is good to represent what is happening in the libraries. Part of the reason we collect the data is to show decision makers the importance libraries play in education, entertainment, and the community as a whole. I have one library (albeit a big one) that has over 6 million Freegal downloads each year and similar numbers on Zinio. If we voluntarily omit massive numbers like these, we are really misrepresenting what is actually going on in libraries. With all of the news articles relegating libraries to the antiquities, it is also good to show they are up on current trends.

Laura Stone (AZ)

In the most recent Public Libraries in the United States Survey (2011), you'll notice a 1.6 percent drop in circulation from 2010 to 2011. In, AZ, I have 2012 and 2013 data. When I look at the trend line, it is continuing to drop. It's too early to tell if it's just a return to pre-recession numbers, but it is a red flag.

Zinio and Freading are viable alternatives to checking out a book at the library. Same with downloading a full book from a database (I think some of our genealogy and business sites have these kinds of collections). I believe we will continue to see this shift. Sometimes a physical book is better; sometimes a digital copy is easier.

In AZ, one of my other hats is to bring up a platform of Arizona-based ebooks. We're working with BiblioBoards to do this. They are very committed to a model of unlimited, simultaneous downloads. And really, isn't that what we all want? As a compromise, we're trying a Netflix model that will allow patrons three check outs that they can keep indefinitely. They have to return something to check out a fourth, however. How in the world would I count that? Yet, we are negotiating hard with publishers, title-by-title. It will be a unique, curated collection, and the catalog records are available to any library in AZ that wants them; they can then put a pointer to our site.

Right now, we're trying to make e-resources (ebooks, edigital, etc.) align to circulation. Perhaps it's time to change that. The term circulation implies a back-and-forth, I can understand an uneasiness to define it too broadly.

What if we figured out the physical and digital material we want to count, and then figured out the different kinds of access/ways to provide that material. So,

Materials might include

Books

Periodicals

Video

Databases
Ebooks
E-etc.
Anything else we think we should add

Material Usage might include

Physical circulation
Downloadable circulation of returnable stuff
Full-text Downloads of non-returnable stuff
TOTAL Materials provided

Let's keep working on this; I'm getting lots of pushback from librarians.

Katrice Stewart (FL)

I'm sort of the same opinion as Laura and Terry and am right now asking myself are we trying to count new things the old way??? Although it sounds like AZ is much further along than us, there was been so much discussion regarding e-books and possible pilot statewide programs.

I REALLY like the idea of "material usage" as it is incorporating the circulation but also could incorporate these other challenges. Juan, I agree with you as well regarding do we REALLY need to count everything a library does but, in my short time as SDC, I can really see the impact a national presentation has as opposed to a simple state presentation. A few years ago Florida did a statewide study of internet connection speeds and bandwidth and shared the results statewide which was met by a little fizzle but when EDGE was brought up nationally, well, everyone was jumping onto the bandwagon.

If we think about our state e-libraries, I know that we would not continue to get roughly \$3 million for our databases if I only reported 52 (one of our LSTA advisory council members is always looking at the grant applications asking what the return on investment is). What we do report is in essence "uses". I understand the local libraries wanting higher numbers to help justify the expenditures.

I think that if we could realign our categories and/or find new ones and really iron out the minutia of the details we could get a lot more buy-in from our libraries and really have more accurate data to show some of the more prominent services being offered.

We definitely need to keep working at this 😊

Patience Frederiksen (AK)

Libraries pay to provide stuff to patrons.

Some of the stuff has to be returned, so maybe that is circulation.

Some of the stuff we pay for they get to keep, so maybe that's usage. Maybe we simply need a new set of numbers on the usage of stuff we paid for, as Laura suggested in her post that included this usage idea.

I think our mayors and city councils and trustees could easily support a new set of measures on usage that the library has paid for and would be able to understand the difference between circulation and usage of stuff paid for by the library. If we keep circulation as a measure, the numbers would be comparable over time and we could simply add usage as a new set of measures.

Kathy Sheppard (SC)

What if, instead of referring to the way the material is conveyed or provided (downloaded or circulated) we instead report the way it is used - "units read", "units listened to", "units watched" - sounds kindergartenish but does this skirt the problem of counting whole units or sections of units?

So you get something , but crystal clear, like this in the survey:

USAGE OF LIBRARY MATERIALS (replacing "circulation") Downloadable materials --Units read --Units listened to --Units watched --Units touched (for Braille, toys, other stuff - although I would probably use just an "other" here)

Physical materials
--Units read
Etc.

I mean, who really cares how people get the stuff? When we describe the usage of library materials outside the library world, we don't employ terms like "circulation" any more (at least when talking to elected officials.)

If we report what we are expending on these materials, and we can also be clear about how people are using them, does that cover what everyone really wants to know?

I just don't think our libraries will ever be able to separate out the downloadable whole units that they purchase from the downloadable sections of units that they purchase, or differentiate between the whole units or sections that they get via a database from the whole units or sections that stream from a vendor. They don't see the value, ultimately and politically, in providing so much detail.

Just some thoughts on a sure-to-be-endless Friday.

Contracted Workers

November 4, 2014

Question

Joy Garretson (MS)

I just got a question from a library director asking if she should report her janitor under “All other paid workers,” even though he is a contracted worker. My opinion is that if she’s paying him, it doesn’t matter if he’s contracted or not; he would still count as “All other paid workers.” What do y’all think? I might be missing something here. Thanks!

SDC Comments

Terry Blauvelt (MO)

I wouldn’t include contracted workers as these are not a part of the library staff, nor are they an employee. Thanks,

Katrice Stewart (FL)

Although I see where Terry is coming from, the definition does include “maintenance staff” and who are paid from the library’s budget. It does not differentiate between contracted workers or permanent staff. Because of those reasons, I would count the janitor. Thanks!

Lisa Hickle (OH)

We don’t include contractual in with staff either, but upon looking at the definition, possibly we should consider changing our instructions to the libraries?

Laura Stone (AZ)

I think it's a gray area. If the library is contracting with a cleaning service, I'd say no as the library is contracting for a service, not hiring an individual. Same with teen labor paid out of another city line as a summer work program. I think it gets more complicated with governmental entities using contract labor for full-time, long-term work professional work.

Rob Geiszler (VT)

Here’s the definition for data element 252 All Other Paid Staff:

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

The significant word is “employees” My inclination is only to count them as “paid workers” if janitor is employed by the library: i.e. library does all withholding, provides W-2 and includes janitor’s salary and withholding on the 940. In any other circumstance, the library has purchased a service from a vendor

OPAC Versus Internet Computers

November 25, 2014

Question

Susan Mark (WY)

I feel like I should know the answer to this...

I thought there was something in the internet computers definition that excluded OPACs, but I'm not seeing it:

<http://plsc.pbworks.com/w/page/7422583/650%20Number%20of%20Internet%20Computers%20Used%20by%20General%20Public>

A library just called -- their OPACs are designated as such, and people tend to respect that, but it would take very little effort to go to the general internet -- just click in the URL bar and type.

Are these internet computers or no? My first instinct was to say no, but that was when I thought the definition excluded OPACs specifically.

SDC Comments

Michael Golrick (LA)

I also thought it was more clearly defined. Here is a link to the current definition on the wiki:

<http://plsc.pbworks.com/w/page/7422583/650%20Number%20of%20Internet%20Computers%20Used%20by%20General%20Public>

If you take out the subordinate clause, it just says: "...library's Internet computers [personal computers (PCs) and laptops], ... used by the general public in the library."

I do not count (well, ask my libraries to not count) those computers which are dedicated to the catalog. Most are pretty well locked down (with no address bar to mess with).

Happy Thanksgiving, everyone!

Scott Dermont (IA)

I agree with Michael's interpretation of this. I usually ask them what the terminal is used for. If it is a single use OPAC, which most are, then I tell them not to count them. If the intent is for the workstation to be more general use, then I let them count it. But normally OPACs are set aside for a single use. I'm sure this will be changing more and more with the introduction of tablets. Maybe we need to give this data element some serious thought in the near future.

[651 Number of Uses \(Sessions\) of Public Internet Computers Per Year](#) mentions OPAC – Kim

2015

Employees vs. Contractors

January 23, 2015

Question

Laura Stone (AZ)

I am sure this is old ground, but want to make sure that I'm reporting this consistently:

If a library has contract workers, do we count them in the number of employees (250-253)? I know we don't include them under staff expenditures under operating (350-351); I'm listing them under "Other Operating Expenditures (357)."

If we've discussed at length already, and someone can provide me with the Wiki link, that will work too!

Happy Friday, All,

SDC Comments

Jamie McCanless (WI)

We tell our libraries to include only those positions funded in the library's budget (per the federal definition) in the number of employees. If the cost of contract workers is not included in staff expenditures, they don't sound like funded positions and I wouldn't include them in the count of staff.

Katrice Stewart (FL)

I disagree to some extent. If we read the narrative for operating expenditures immediately above definition 350, there is discussion regarding "funds being supported by expenditure document at the point of disbursement...".

We have several libraries who do operate with a fair amount of contract / temporary staff as well as LSSI staff. The root of question #350 is how much is paid for salaries and wages for all library staff. I do not think they particularly have to be included in the staff expenditures budget.

I've told our libraries to include temporary / contract workers as well as LSSI. Otherwise I think we are painting a very distorted picture of what is really happening. To not include these staff is significantly understating the cost of labor to run the library.

Just my 2 cents ...

Ann Reed (OR)

We ask LSSI to report these costs even though from the City/County level they are a contractor. We are big on the “even if other people pay, include the cost if it keeps the library running” school of thought.

Katrice Stewart (FL)

Thanks, Terry, for your thoughts. Unfortunately our definitions do not specifically define staff, so I again disagree to some extent. If I have a library who, because of budgetary conditions, cut 10 positions back in the lean days but now, because of a growing budget, are able to use a temporary staffing company, say Kelly Service, to hire temporary, contract staff to carry out the basic functions of the library, then they should absolutely be included because that is what the intent of this question is.

Susan Mark (WY)

So we update our two-question survey to three:

Did you have stuff?

Did people use it?

Did someone get paid to make this all happen?

Jamie McCanless (WI)

The definition of paid staff does read “Include all positions funded in the library’s budget...” so if a contract worker’s position is included in the budget then, sure, include it in paid staff and staff expenditures. If the position is not consistently reported in staff and staff expenditures, both staff and salary/wages data are skewed.

Katrice Stewart (FL)

I agree whole-heartedly.

Laura Stone (AZ)

This makes sense to me, too. It also allows us to more accurately gauge staffing levels.

Terry Blauvelt (MO)

When I relook at this topic, per the definition we are actually collecting the number of paid positions vs. number of paid staff, which isn't always the same thing.

Ann Reed (OR)

Ah, (suffering excess of sugar I think)...

4. How can I get money out of this?

Nicolle Steffen (CO)

In Colorado we do not count contractors as employees (aka staff). Because of the restrictions put on "true" contractors (read IRS regulations) they are not regular employees.

Can a kiosk be considered a branch?

March 25, 2015

Question

Bob Keith (NJ)

One of our county libraries has just opened a kiosk in a local mall. This kiosk would basically allow library card holders to download ebooks and eaudiobooks to their devices in the mall. They want to count it as a branch (for e-rate purposes, but that's a separate discussion). Based on the definition for 210 Number of Branches I don't think that this should be considered a branch. What does everyone else think? Here is a picture of the kiosk in case that helps: <http://www.bcls.lib.nj.us/bcls-kiosk>

Thanks much!

SDC Comments

Terry Blauvelt (MO)

I would say it does not meet the definition, since it does not have paid staff at the location.

Jamie McCanless (WI)

We've had that question here within the past week as well. One of our libraries has an unstaffed, automated location where patrons can pick up materials on hold (http://www.mpl.org/hours_locations/mpl_express.php). Like yours, it doesn't fit the definition of 210.

In Wisconsin's annual report, we collect a "Number of Other Public Service Outlets" in which this kiosk would be counted. Our definition is:

Other public service outlets are locations to which library materials are delivered for availability, but they have no permanent collection or no formal circulation to individuals is conducted by library staff. Do not report bookmobile stops. Include collections in preschools, nursing homes, jails, etc. Enter the total number of other regular public service outlet locations (not individual drop-offs).

That data is not included in what we submit for the PLS or in our annual Public Library Service Data. It is provided only so that libraries can document other types of locations.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov.

Scott Dermont (IA)

I agree. I don't think a computer and a drop box should count as a branch. Maybe these kinds of services could be counted in other ways, and we have actually talked about that in the past.

Laura Stone (AZ)

I agree with Terry.

The definition of a branch is:

Separate quarters
Organized collection
Paid Staff
Regularly scheduled hours

While we don't define the role of paid staff, I think it can be implied that paid staff is at the "separate quarters" during the regularly scheduled hours. And, I would question whether the kiosk is in a separate quarters – it's more analogous to the bookshelf a library might stock in a community center or senior center.

We've talked before about adding a catchall category for kiosks and other remote services. Is this something to consider?

Susan Mark (WY)

"We've talked before about adding a catchall category for kiosks and other remote services. Is this something to consider?"

I would say this is indeed something to consider, and we've batted it around before. Libraries are increasingly finding new and innovative ways to deliver services that don't necessarily meet the definition of a branch. The problem we've run into is coming up with a good definition. In our state, I don't know of any kiosks yet. However, in the past we collected "other" service outlets -- such things as whether they dropped off a rotating collection at the senior center. If we can pin down exactly what we want to collect for "other remote services," I'm in. I think it's a good measure of our libraries getting out beyond their walls and serving their communities.

Cathy Van Hoy (OK)

Yes I've heard of the same thing for Erate purposes but according to our PLS definition a kiosk is not a branch and therefore, not eligible for Erate.

The kiosk is a great service! Hope the library will continue it even without Erate funds.

Katrice Stewart (FL)

We have several similar situations and do not allow them to be considered branches. We site the Federal definition as the basis. ☒

We do have some shared-space libraries (maybe a separate room in a rural fire department location) that do meet the definitions that we do all.

I DEFINITELY support capturing non-traditional methods of providing library services such as a kiosk or book vending machine. I'm planning to propose something this upcoming year.

Hope this helps!

Deb Burton (DE)

I agree that this would not be a branch by definition. However, it does bring up an excellent discussion for the future. This sort of modular or mobile unit may become more and more common over time. Our libraries have grown far more flexible over the years - from stone buildings with books and card files to hubs of books, technology, and communication. Just something to observe and see! With enough activity, this could certainly be something to add for reporting someday.

What qualifies as a meeting room?

March 26, 2015

Question

Amanda Johnson (NC)

My name is Amanda Johnson and I am the new data coordinator for North Carolina. I just received a question about one of our data elements that I can't find the answer to in our documentation and was hoping one of you may be able to help.

We ask our libraries to report meeting room use, however, I cannot find documentation that defines a meeting room. One of our library directors has asked if a study room that can be booked in advance and holds up to 8 people counts as a meeting room. Are any others collecting meeting room data, and if so, would you be willing to share your definition of a meeting room?

SDC Comments

Susan Mark (WY)

That's an interesting question.... we've been collecting it, but never defined it, other than specifying a use had to be an outside group and not a library event. Oops!

Katrice Stewart (FL)

Florida does not collect specific data on meeting rooms at the state level. I know a few localities track things such as that but simply refer to their own rooms (which I'm thinking probably won't help you ☹).

Scott Dermont (IA)

We have a similar element in our survey. Your description would meet my vague definition of a meeting room. What I normally don't count is if a group just takes over a table in the library and holds a meeting there. Our definition reads "Report the annual number of times the library's meeting rooms are used for non-library sponsored programs or meetings." This data element seems to be there primarily to "give credit" to libraries, and I don't really use it for anything. But it can be useful for libraries that are working on space needs assessment that want to get an idea of how much their meeting rooms get used.

Jamie McCanless (WI)

We don't collect data about meeting rooms in Wisconsin, but Scott's mention of space planning reminded me of our space needs publication, which does include some description of meeting space

definitions: <http://pld.dpi.wi.gov/sites/default/files/imce/pld/pdf/plspace.pdf#page=23>. The connection to your question is a little tenuous, but that's all that comes to mind right now.

Kathy Sheppard (SC)

South Carolina does not collect this data either (although we wish we did.) If we add to our survey we will likely refer to our standards, which state that libraries should provide meeting rooms:

- To reflect the library's role in the community, a public meeting room is provided for library programming and for use by community groups.

That gives us the start of a definition, and this other standard adds some conditions:

- [A meeting room should contain] furnishings and equipment for public and staff meeting needs of patrons of different ages, and following ergonomic recommendations and ADA regulations.

To be considered a meeting room, then, a space would meet those conditions and standards. Not the best definition maybe but is at least something our library community has agreed on.

Scott Dermont (IA)

Yes, good reminder there Jamie. That is a great document and we refer our libraries to it a lot. I think the definitions there are basically what I keep in mind, but I just don't have them specified in the survey. I should probably think about doing that.

Deb Burton (DE)

My personal opinion: I think it is important to set a standard for meeting room versus study room if you're looking at those stats. Just off the cuff, I think of study rooms as capable of holding up to 10 people whereas meeting rooms would hold more than 10.

Think of Kathy's example from her state standards:

- *To reflect the library's role in the community, a public meeting room is provided for library programming and for use by community groups.*

With that in mind, community groups are seldom smaller than 10. Perhaps a sq ft figure would be better though? Very interesting question, however. I'd like to research what is used in spatial studies to determine needs.

Programming counts question

April 3, 2015

Question

Scott Dermont (IA)

I have an interesting programming dilemma. We have a county where there are 6 public libraries. All 6 libraries receive funding from their county to provide programming. They usually have 4-6 programs a year. They are always at a non-library site, and they tend to move around the county. They all help plan and staff the programs. So, the dilemma is, how do we count this for survey purposes? My initial response was that we don't want them over counting. We don't want 6 libraries all counting 4 programs a year, as that would be 24 programs a year, instead of 4. It would also cause problems with attendance. So, my solution was for one library to claim a program. But since they are all in attendance at each helping out, I thought they could divide the attendance equally. This would mean that there would be four libraries reporting one program a year, and 1/6 of the total attendance. Normally they are not each doing their own "station" at any of these joint programs. They are all in it together.

Does this make sense? What would be the alternative?

The other question that they had was if they could send volunteers to run their portion of the program. Sometimes these programs are during the day, and there is at least one, one-person library in the group. They want to be able to send a volunteer to represent them at the program. They still do all of the planning work for the program. I think that this should still count, but wanted to hear from your collective wisdom on this topic as well.

Thanks for the help, and have a great weekend!

SDC Comments

Kristen Stehel (UT)

Are you saying that the 6 public libraries are classified as city libraries? They don't all fall under a county-wide system that submits one county report?

Thanks for clarifying.

Scott Dermont (IA)

Yes, that is correct. We only have 3 county library systems in Iowa. The other 96 counties contract with the city public libraries in the county to provide services to rural residents. Each of the 6 libraries in this case are independent entities.

Jamie McCanless (WI)

I actually think each library should count all of the programs it co-sponsors. That's the definition. If you divide the count, fewer than six programs would mean at least one library's involvement is omitted. Even if each of six libraries reported one of six programs, their community involvement and services would be considerably underreported and not reflect the value or use of the county's funding.

Yes, do divide attendance equally among all co-sponsoring libraries, and thoroughly annotate the data.

I do agree that it shouldn't matter whether library staff or volunteers run part of a program. In fact, it shouldn't matter whether any library staff or representatives are involved in running the program as long as the library was part of planning or otherwise sponsoring it.

My two cents on a Friday afternoon before a holiday weekend.

Scott Dermont (IA)

So in your model, I would get the results:

6 libraries provide 4 programs, with a total of 600 attendance.

Each library would report 4 programs and 100 attendance on their survey?

This would give a total of 24 programs and 600 attendance for those 4 programs. In the greater scheme of things, this isn't a huge number, so it could be doable. Does this make sense to everyone?

Laura Stone (AZ)

If this were Facebook, I would "like" Jamie's response.

Jamie McCanless (WI)

Yes, that's what I'd do, noting with the number of programs that they were co-sponsored with other libraries in the county, and noting with the 1/6 total attendance that it's the unduplicated attendance representing the library's involvement in the co-sponsored program(s).

Scott Dermont (IA)

I like it a lot and I think my libraries will appreciate being able to get full "credit" for providing this great service. I think I just wanted to make sure that there wasn't a problem with duplicating the program count.

Jamie McCanless (WI)

I think this may be something we encounter more as libraries pool resources. I certainly do a lot of un-duplicating of data here with our regional library systems. Reporting data at the administrative entity level has its pitfalls, but my hope is that the annotations help Census roll up data with less duplication.

Katrice Stewart (FL)

We face that similar situation a lot and handle it as Jamie suggested. I “like” Laura’s “like” of Jamie’s comment :)

Happy Easter to all!

Data on weeks open

April 3, 2015

Question

Amy Heebner (NY)

Has anyone done a state to state library comparison on weekly hours open? We are just getting started on this using the IMLS data but didn't want to reinvent the wheel.

SDC Comments

Katrice Stewart (FL)

Sorry, Amy. Florida has not...

Does streaming count as downloadable?

April 23, 2015

Question

Michael Golrick (LA)

Maybe I need another cup of coffee or something. But yesterday one of my libraries in responding to my question about their data submission said that they no longer had downloadable videos, because they went to streaming.

I am drawing a blank about the conclusion we came to, because I have a feeling we talked about this, and decided that “streaming=downloadable” for us. Am I crazy or confused?

Many thanks. I am glad it is Thursday, and therefore the end of the work week!

SDC Comments

Terry Blauvelt (MO)

The mechanics would be the same, but the downloadable would generally be storable on an electronic device for a time. I remember discussing streaming as parts of programs/attendance, but don't remember the specific outcome. To me, it seems streaming and downloading could be interchangeable.

Jamie McCanless (WI)

Is this for reporting collection sizes or for uses?

If a streaming video does not have a limit to the number of concurrent sessions akin to availability of downloadable video units, I don't see how streaming = downloadable.

Michael Golrick (LA)

I will go back and look. It was a “yesterday” conversation (electronic, of course). I think it was collection size, which went from hundreds to zero, even though there are use numbers.

451 Changes (FY2015)

May 13, 2015

Question

Terry Blauvelt (MO)

With the acceptance of the 451 Electronic Books definition change, it appears Freading and Ebrary materials will now be counted as it seems they meet the new definition. Are there other vendors that meet the new definition that did not previously?

SDC Comments

Amy Heebner (NY)

Does Zinio meet the new definition?

Laura Stone (AZ)

I would not include Zinio. My experience with Zinio is that a digital copy of the magazine is downloaded, but never returned. The definition says: Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use.

Terry Blauvelt (MO)

I plan on using the following parameters for e-book qualification (must meet all three)

1. Held by the patron for a limited time (set circulation period)
 2. Accessible with a valid library card
 3. Finite simultaneous use
-

Scott Dermont (IA)

I have been including Zinio. The main reason is that the libraries purchase the subscriptions individually. So they "own" the title rather than just subscribing to a large database. I guess I can justify the downloaded but never returned element by comparing it to an in house use. In my mind it is different from Freegal in that the library still owns the item after the patron downloads it. Unlike Freegal where they are just giving the downloads away.

A fine line indeed.

Changed data element definitions (FY2015)

May 19, 2015

Question

Scott Dermont (IA)

I am getting my FY15 survey ready and want to use the new definitions for sections 450-460. When I first looked at these changes, I thought they were OK. Now, on closer inspection, I find some of the wording to be confusing. In the introductory text for the section that starts: "This section of the survey (450-460) collects data on selected types of materials." There is a line that reads "Do not include items freely available without monetary exchange." I think the intent works fine with electronic materials, but I'm afraid it is confusing or contradictory when talking about physical items since we also say to report items that have been purchased, leased, or licensed ... by a donor... Donated items are by their very nature "freely available without monetary exchange." I think I am going to leave that line out of my definition for physical items and include it only for the electronic materials. I understand the intent, but I'm afraid that my directors will only be confused by this statement. Some of them like to read into every detail and make a big deal out of perceived inconsistencies.

I'm also a bit confused about the sentence that states "Count electronic materials at the administrative entity level; do not duplicate numbers at each branch" I'm assuming that we want a total count of all branch use of the electronic materials, just like we do with physical items. I don't think I understand the "duplicate numbers" part.

This is what I ended up with for the physical items in my survey. I think it keeps the intent of the changes.

Report only items that have been purchased, leased or licensed by the library, a consortium, Iowa Library Services, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location. Inclusion in the catalog is not required. Do not include items that are permanently retained by the patron. Count only items that have a set circulation period. Do not include uncataloged paperbacks. Do not include the number of serial items.

I'd appreciate any help that I can get with this.

Thanks.

SDC Comments

Susan Mark (WY)

With donated materials, someone paid for them at some point. That was the intent of that language. However, it may need to be clarified for the end user a little better. Nicely caught.

Laura Stone (AZ)

These are good questions, and ones I think we're all going to need to grapple with.

I have read and thought about the "freely available" and "donor" issue a number of times. I ended up understanding "freely available" meaning "freely available on the internet to everyone." I've had folks who want to count Google Books, or Project Gutenberg books, and that's what we're trying to avoid here. Further, although a donor (or consortia purchase) may make materials "freely available" to patrons, the materials weren't initially free – someone had to purchase them for the library.

Re: Count electronic materials at the administrative entity level: In my experience, electronic materials are made available at the administrative/system level – not the branch. Some systems assign patron cards a branch, but not all do, so different libraries might come to a total count of electronic material use differently. Regardless, I think the admonition applies to the count for electronic materials (units) – NOT the usage.

I agree that we should continue to refine and clarify these definitions going forward.

Happy Tuesday, All,

Scott Dermont (IA)

(Laura)

I have the same understanding as you on the first point. I just think it confuses the end user.

Thank you for the clarification on branches. My mind was indeed stuck on circulation. That line makes total sense to me now.

Thanks for the help.

Scott Dermont (IA)

(Susan)

But the library doesn't pay for donated materials. As far as the library is concerned, it is just as free as Project Gutenberg. I thought one of the reasons to include donated materials in the definition for physical material types is that it would be impossible to differentiate them from purchased items.

Actually, now reading the definition again. I have another question. We say that inclusion in the catalog is not required. This makes sense for downloadable materials, but does that mean that we need to start counting uncataloged paperbacks? That is something we've never counted before – at least in Iowa.

I think my hang up with this wording is that it is in the general introductory text for the section. I think trying to lump physical and electronic together in this introductory definition doesn't work. But elements of it work fine based on each individual collection type.

Cecilie Maynor (TN)

I am also preparing for the survey these days and will send an email to our libraries with an overview of changes to definitions (and possibly new questions?).

I am curious about how libraries will count e-collections versus databases this year. We have previously talked about selected vs not selected titles and since this is no longer part of the definition how much will that impact what they are counting?

I definitely need to learn more about the different vendors and how they work!

Scott Dermont (IA)

I actually don't think the selected vs not selected issue has changed with the clarifications. We still have the text for "units of acquisition or purchase." I still see selection as a major criteria for these elements. Maybe I'm wrong about that change. That would be a huge problem if that part of the element is totally gone. I would not have voted for change.

Cecilie Maynor (TN)

You are probably right, but it is easy to get this muddled up I think. How are units purchased..as a pre-selected group or individual titles? I might just be confusing myself here (It happens for sure).

Thanks!

Laura Stone (AZ)

(Scott & Cecilie)

The phrase "Report only items the library has selected as part of the collection" has been removed from 451 (ebooks); 453 (audio downloadable); 455 (Video downloadable). It was replaced with the following language:

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

“Units of acquisition or purchase” is a way of getting at how much of something a library bought; I don’t think that implies individual selection.

Now I’m wondering if we are using different definitions of the word “selection.” Do you mean title-by-title selection, or does selection mean the act of choosing one product or vendor over another (Zinio with 200 current magazine titles vs. New Vendor with XX current titles).

Yes, I think the change in definitions is going to require us to resort Electronic Materials (ebooks, audio and video downloads) and Electronic Collections (databases). The intent with the updated definitions is that you count it individually as materials if you Circulate the item – meaning check it out and check it in. Otherwise, it’s an electronic collection (database).

I’m thinking we need to create a decision tree showing what to do with different kinds of stuff.

We’ll sort it out. And we can still rework, if needed.

Scott Dermont (IA)

This issue was basically what I was trying to get to at our caucus last week. Hoopla uses a model where the patron checks an item out for a set period of time. Check out and check in. However, Hoopla is basically a database with hundreds of thousands of streaming/downloadable items. It was really clear that people at the meeting thought it should count as a database, but it does use the model you are talking about Laura. Hoopla is clearly a database, but its checkout model blurs the definition.

To me, selection is the process that the library uses to add items to its collection. Selection is not selecting a database that contains 300,000 items. The library has no input on what any of those items are. Selecting is buying items (of whatever number) based on local need using the library’s collection development policies. Once again, saying that the library needs Hoopla as it fits its patron needs does not automatically mean that the library should count those 300,000 items as part of its collection.

I think most library directors understand this difference. I think the problem occurs when counting use. If we say that you can only count use on items added to the collection, the definition of items in the collection becomes important. I think we either need to count all use regardless of format (I disagree with this model) or we have a separate count for database use (my preference). Either way, we need to have something in place that accounts for a major service that libraries are now providing.

Maybe I need to sketch out why I feel this way about circulation. Originally, circulation counted the checkout of physical materials – primarily books. Circulation is/was a major indicator of how a library is used and an indication of work performed by staff. Circulation is more than just checking the book out. It is also an about returning the book to the shelf. As I mentioned in an earlier email, I believe that check-in is where most of the actual work occurs during circulation. The library has to process the item as a return, sort it, cart it up, and return it to the shelf. Some parts of this process is automated now, but the work still needs to be done by something or someone. This is the main reason that circulation period doesn’t really matter. It takes as much work to process an item that checks out for 3 days as it does for an item that checks out three weeks. In my world view circulation counts two different things. It counts the patron’s use of the item, and it counts the work involved with making the item available to the patron.

With that in mind, adding electronic circulation to the total circulation count is comparing apples to oranges. For the most part, there is no physical work involved in checking out an electronic item. You are counting the use of that item (which is very important) but you do not have corresponding physical work that goes along with that use.

I think in my ideal world we would have two separate counts. One count for physical item circulation, and one count for non-physical item circulation. It think it would become a lot easier to count both if we don't have to try to figure out how to put them together. I don't think that will ever happen, but I can dream can't I?

Sam Shaw (NE)

(Scott)

Since I'm still a relatively new SDC, I mostly just listen and read here, but to me Hoopla seems to me to be one of the easier download services to report. And I'm in the minority to say that while it may or may not be a "database", I wouldn't report it as a database. Hoopla has downloadable eBooks, movies, music, audiobooks, and television video. Since none of these individual titles are selected by the library, none would be reported in the library collection (450-460). However, since (as you correctly note) they have a set circulation period (they are "returned"), seems to me that you count them as electronic circulations (552). 552 says to include: "e-books and downloadable electronic video and audio files. ... Note: Do not include databases." So if you count it as a database you don't count the circulation under 552, but the content in Hoopla includes e-books, electronic audio, and electronic video, and it is "returned".

I had one Hoopla library on last year's survey, and this is where they reported Hoopla use (552). Ironically, my local library just started offering Hoopla this month, and last night I was able to browse and checked out a video title. The interface is reminiscent of Netflix.

Sam Shaw (NE)

(Scott)

I suppose it helps to read the new definition of 552. Sorry all!

I see the confusion on the new 552:

"Include circulation only for items counted under Electronic Books (e-books), Audio Downloadable Units and Video Downloadable Units in the Library Collection data 450-460".

Seems to me that this definition change is A-OK if we have a new version of the 459 that did or did not pass. I did vote for the new 552, but in light of the 459 yea or nay, I'm not so sure this was a great idea in retrospect.

Scott Dermont (IA)

(Sam)

My problem with that is we normally only count circulation on items that are part of the library's collection. To me, Hoopla is a database, and is not counted as part of the collection, therefore also not counted as part of circulation. The original text of 522 states "Do not include databases." This was problematic as the definition of database has become rather contentious. The new definition states: "Include circulation only for items counted under Electronic Books (E-Books), Audio-Downloadable Units and Video-Downloadable Units in the LIBRARY COLLECTION data elements 450-460. Do not include items not specified under those definitions." Since the items in Hoopla are not included on data elements 450-460, the use of those items shouldn't be reported on line 522.

Laura Stone (AZ)

(Scott)

I'm in agreement that we still have lots to figure out, so my question is to help me better understand what exactly we need to figure out.

Why do you figure that the materials that libraries make available through Hoopla are not included in data elements 450-460? The items circulate, and the library (or somebody) paid for them. Isn't that what the definition requires?

I appreciate that you may have valid concerns with including the materials, but as I understand the definition, aren't we being instructed to do so?

I am in agreement that we shouldn't count an item in one place (electronic collections) and include the circulation someplace else.

Scott Dermont (IA)

(Laura)

I guess the question is whether or not we consider Hoopla to be a database. When I brought that question up at the caucus last week, it was pretty clear that the consensus was that it is a database. My understanding of old element 552 is that if a resource is considered a database, that use should not be counted in element 552. With the new definition, you should only count an item for use on 552 if it is also counted as an E-book or downloadable audio/video on lines 451, 453, and 455. So, while items in Hoopla have a circulation period, Hoopla is still considered a database. Otherwise, libraries could justify adding the hundreds of thousands of items claimed by the service. Hoopla should therefore be reported on line 458 and not on line 552. Or, am I reading this all totally wrong?

To answer Laura's question with a question, how would you count an item for line 451 in the case of Hoopla? Would you say that since 10 e-books checked out, that it would also count as 10 e-books for

451? So in this case, the inclusion in the collection is based on circulation rather than the other way around? Now I'm getting dizzy...

Sam Shaw (NE)

(Scott)

I have at least one library that reports the holdings for 451-453 based on the number of circulations reported in 552. At first, when they explained this to me, I responded with a "huh?"; now I'm not so sure it matters much. I think it does however matter whether or not the item is returned. The old 451 (FY 2014) said to report only "items the library has selected as a part of the collection" (which would seem to exclude patron driven acquisition like we are discussing), but the new definition for 451 removed that language.

In most cases (at least in my state), the numbers in 451-455 are always inflated due to reporting of consortia holdings anyway. I suppose the circulation or use numbers portray a more accurate picture of the value of the service (regardless of what you want to call it).

Terry Blauvelt (MO)

Sorry I'm late to the show, but wasn't the reason Hoopla was considered a database due to the "selection" requirement? Now that the "selection" requirement is gone, why can't it be included. All e-books are held in a database format.

Scott Dermont (IA)

I guess this then comes back to my question about what we are counting. Are we just counting use in this case for line 552? Or are we also counting these items from Hoopla as part of the collection for lines 451, 453, 455? If part of the collection, then how are they counted? Just when they are checked out? This is backwards from what it says in the new version of element 552. As a reminder: "Include circulation only for items counted under **Electronic Books (E-Books), Audio-Downloadable Units and Video-Downloadable Units in the LIBRARY COLLECTION** data elements 450-460. Do not include items not specified under those definitions." Or, are we saying to count the entire Hoopla collection as part of the library's collection?

Terry Blauvelt (MO)

It seems to me that the collection aspect of the electronic materials is less pertinent than the usage/circulation. I have a collection of Hot Wheels somewhere in my attic that hasn't been out of the box in 25 years or more. It's not really relevant that I have them, since I don't use them or really know where they are. I know IMLS has a quid pro quo connection with the e-books and circulation, but with the non-ebook materials, usage is really the only thing that is important. However, if we only report the usage in the current categories, we will get a significant number of edits.

Scott Dermont (IA)

I think use and collection goes hand in hand in libraries. If I had a physical item sitting on the shelf for 25 years without checking out, I would weed that item if I was in a public library. If I was paying for a set of E-Books that weren't getting used, I would stop paying the fee. Of course, that is a more local use of that stat. Maybe it doesn't apply at our level. That being said, I think that everyone will want to use a consistent definition when counting circ.

I can see where electronic item use may be more important than ownership. We may be seeing libraries becoming more of a portal rather than an collection when it comes to electronic materials. In that case we need to count what is important. That is why I think I'm advocating a separation of electronic use from physical use in our total use. We are currently counting two very different services into one total. If we can separate the electronic from the physical, I think it becomes a lot easier to figure out how to count both.

Terry Blauvelt (MO)

I don't think there is a weeding process in these large electronic collections (I may be wrong), since the space on a server is all that is taken. In a collection of 300k items, heavy use is normally about 20% (60,000) of items with the most use coming from the same group of materials. Generally, a library can't opt out of paying for the remaining 80% that sees limited or no use. This would be my argument for not counting an accessible electronic collection separate from the current one database.

I would like to see an "electronic usage" category that is separate from 552, not tied to a collection, and not counted elsewhere. I think this is the way to capture Freading, Hoopla, Tumblebooks, etc.

Scott Dermont (IA)

(Terry)

Normally you should weed electronic items just like physical. The only reasons you may not need to weed would be for condition or possibly space. Other factors would still apply. But if you don't have control over the collection, weeding is a moot point. This is one of the reasons I like to see libraries maintain their own collections rather than being a portal to another service. Just my old, out of date, view.

I do want to see the use of those services that you list. We have decided to go ahead with a count for those items on our survey this year. It will be a separate count – not part of 552. I'll be curious to see what our definition looks like when we are done. I assume it won't be perfect, and will need some tweaking. But I'm OK with that.

Microsoft 2003: The New Frontier

May 26, 2015

Question

Joy Garretson (MS)

I just received an interesting answer from a librarian about what she's counting as a database as her library. Here is my question (in black) and her reply (in red):

- **Question 17.1 (Local databases):** You report that you purchase 17 additional databases for your library system. I couldn't find them on your website—would you mind sharing that list with me?

According to the instructions on the MS Public Library Annual Statistical Report a CD-ROM with data accessed electronically qualifies as a database. We have some CD-ROMs that are used in the Library & some that check out. The following CD-ROMs (windows or MAC compatible) are what we counted:

2 disc - City Directories
1 set (6 disc) - New Yorker: 1925-2005
1 disc - Expository Dictionary
1 disc - The Encyclopedia of Mormonism
5 disc - Core Learning Health Beats Series on Health Education
1 disc - The World Encyclopedia of Roses
1 disc - Biology: The Unity & Diversity of Life (text)
1 disc - Faith in Every Footstep: 150 years of Mormon Pioneer 1847-1997
1 disc - Microsoft Office 2010 (text)
4 disc - Microsoft Publisher 2003 (text)
4 disc - Microsoft Word 2003 (text)
4 disc - Microsoft Powerpoint 2003 (text)

I'm a little boggled here. I can see some of these as counting as databases, but I'm having a real problem with them counting Microsoft Publisher/Word/PowerPoint 2003 as databases.

Also, The New Yorker? Wouldn't that be more of like an anthology?

And is the Encyclopedia of Mormonism not...just an encyclopedia?

She's using this definition:

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. Each database is counted individually even if access to several databases is supported through the same vendor interface.

What do y'all think about all this? I could maybe come up with the answer on my own, but Excel has killed my brain for the day.

Help!

SDC Comments

Katrice Stewart (FL)

(Good morning, Joy!)

I can't possibly imagine a time when Microsoft products would count as a database...Interesting interpretation on the part of the director but I still don't see it...

Terry Blauvelt (MO)

Hi Joy,

I guess my question is for the non-program CD's, is do they have a user interface that allows them to be searched and manipulated. If they do not, then I would think they would be e-book(s) on CD. I'm guessing New Yorker would be a magazine collection on CD.

My two cents. It's all I have at this point in the morning ☹.

Michael Golrick (LA)

Hello from the road...

The Microsoft discs? No way. And she should be counting titles, not discs. We used to have Encyclopedia Britannica as one of our statewide databases, so I do not have a problem with counting the title as a database. If the New Yorker is searchable, and has all the cartoons, it could be a good resource. Likewise the Mormon items. I would give her credit for 8.

Just my opinion...

Scott Dermont (IA)

I would struggle with counting any of that list as a database. I definitely would not count text books or "multimedia" CD-Roms as databases. I would definitely take the Biology and Faith in every Footstep discs off that list. I personally think the others are marginal at best. None of them really fit what I would consider to be a database. Just because an encyclopedia is on disc, it doesn't mean that it is a database. It is an encyclopedia. In 1995 we might call it a database. In 2015 we might call it a searchable E-book. And definitely do not count the office products. But that is just my opinion.

Joy Garretson (MS)

Thanks all!

The Microsoft discs are still making my head hurt! I appreciate the input! I just couldn't make sense of it yesterday because I didn't feel like any of those were database material.

My problem with counting the Encyclopedia on CD-ROM as a database is that it's not dynamically changing/updated/kept current/reissued in the way that an online subscription might be.

Either way, I'll let all of you know whenever that system decides to weed those Microsoft CD-Roms in case you've got a hankering to re-experience computer life from 2003!

Circulation of Children's Materials

June 2, 2015

Question

Colleen Hamer (MT)

Are 'young adult' materials seen as children's materials for the purposes of 551 Circulation of Children's Materials?

Thank you.

SDC Comments

Jamie McCanless (WI)

(Good morning, Joy!)

Although we know that materials are not consistently identified as children or young adult throughout Wisconsin, only the circulation of those categorized as children's materials should be included in 551.

See: <http://plsc.pbworks.com/w/page/7422576/551%20Circulation%20of%20Childrens%20Materials>

Programming question – StoryWalk

June 4, 2015

Question

Scott Dermont (IA)

I received this message below from one of my libraries. I'm rather intrigued by this, but I'm not sure if it should count as a program. Does anyone else have anything like this that is being counted? I guess this could fall under the category of "passive" programming. Maybe just count the number of "attendees" without a program count? Or count it as one program? Or don't count at all?

Thanks as always for your collective wisdom.

SDC Comments

Cecilie Maynor (TN)

What a great idea.

First thought:

I would want them to count it as a program and count the signed-in as program attendees.

Jamie McCanless (WI)

Well, by definition it's not a program.

It's a type of passive programming that, in Wisconsin, we call a drop-in activity. The PLS doesn't collect data for drop-in activities.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov.

Megan Schulz (KS)

Is there a way to ask in the guest book how many are with you today or something like that? Though maybe each adult will sign but not record their children. I know that I sign guest books but my husband does not.

We do something similar when we hold webinars as we know that some library staff members sit at one computer together for a training session and that is how we capture all who attend. We ask if you have a viewing watch party to type in the chat how many are at your location.

Just a thought.

Scott Dermont (IA)

I think that is a good point about counting guest sign-ins. My problem with this is that there is really no verification. What keeps a person from adding a number next to their name, even if they are alone. There really is no oversight to the attendance. That and Jamie's point about drop in activities is swaying me towards a no count.

Database question: Insert clever baseball/database pun here

June 5, 2015

Question

Joy Garretson (MS)

Once again, I have a database question—this time, for a change, it’s just a normal question and isn’t about something crazy a library system is doing. I am in a discussion with one of my libraries about how to count the databases they purchase locally. Here’s the question below:

We have Westlaw Online Law Library that shows a list of 24 databases and we have USA Business Databases(Reference USA) which lists 6 databases – but we have been counting USA Business Databases as 1 database. Should we also count Westlaw as 1 database instead of 24?

How would you count these? I am tempted to count the Westlaw Online Law Library as 24 databases. Westlaw’s website states,

“We offer affordable library plans for a wide range of trusted resources, built on a legacy of more than 150 years of legal publishing.”

This leads me to think that a library can tailor what they order (or how many databases they opt in for) according to their budgetary needs. I feel like the business databases may fall under the same rule and should be counted accordingly.

Thoughts?

SDC Comments

Jamie McCanless (WI)

If the library’s purchase from USA Business Databases provides access to all six databases, count six. If the purchase is for the library’s selection of fewer than six, count however many the library’s users can access. Ditto Westlaw Online Law Library.

It doesn’t matter whether multiple databases are accessed through a single interface because by definition “Each database is counted individually even if access to several databases is supported through the same vendor interface.”

<insert witty response to clever baseball/database pun here>

Terry Blauvelt (MO)

It’s all about that database, bout that database, no treble (think Megan Trainor). Happy Friday afternoon!

Registered Users and Guest Cards

July 13, 2015

Question

Amanda Johnson (NC)

I received a question from a library director about counting registered users. Her system has two types of cards: full library card and a guest card that only gives computer access. Signing up for a guest card is an abbreviated process and they only collect the name and age of the patron and the card can be used to access the computers and printers at any location and time (it's not a day pass and it's not just necessarily out of system residents applying for these cards to get around paying for a full card). Technically the guest cards seem to meet the requirements to count as registered users of having applied for a card, having a barcode, and having conditions for using library resources, though not all resources. So should patrons who sign up for guest passes be counted as registered users? Thanks for the guidance.

SDC Comments

Terry Blauvelt (MO)

It seems to me that your scenario wouldn't meet the "may borrow library materials or gain access to other library resources" part of the definition. While they have access to one resource, they can't check out materials or use anything besides the computers and printers. It seems like a way to track computer usage.

Jamie McCanless (WI)

My first thought was the same as Terry's, but computer and printer access are library resources. (Does your guest card include wi-fi and other Internet access?) The definition doesn't stipulate which or how much/many of the library's resources a user uses. Some Wisconsin public libraries offer this type of card and under the definition for 503, we think those users can be counted.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov.

Amanda Johnson (NC)

Thanks everybody! You all brought up points I had been thinking about. I was initially concerned about the "access to library materials" part of the definition too but as was pointed out the computers and printers are library materials and many of our databases are purchased at the state level and authenticated by IP address so these patrons would also have access to all of those resources with a guest card as well as wifi. Considering all of that, I feel pretty safe saying these cards allow access to library materials even though it doesn't include check-outs.

July 19, 2016

I need to follow up with the director about whether she can determine active vs. in-active guest cards and if she can I will advise her to include them as registered users.

Thanks!

Can devices (iPads) be counted as a library computer?

July 16, 2015

Question

Kristen Stehel (UT)

650. Hi all, can devices such as a circulating iPad be counted as a library computer for reporting purposes?

650 Number of Internet computers for the general public
This is the number of library computers connected to the Internet and used by the general public.

The Merriam Webster dictionary defines a computer : one that computes; specifically : a programmable usually electronic device that can store, retrieve, and process data

Doesn't an iPad do that?

SDC Comments

Jamie McCanless (WI)

Kristen,

My take on this is that, yes, an iPad that is available to library users and not circulated as part of the library's collection can be counted as a library computer connected to the Internet.

Joe Hamlin (MI)

Kristen,

I agree with Jamie if it doesn't leave the building, I would count it as a library internet computer. You did say it was a circulation iPad though, does that mean that a patron can check it out and take it home? The way I'm reading 650 & 651 if it leaves the building you could still count it as a library computer in 650 but not the number of sessions in 651 (the definition states "the total number of uses of the library's internet computers in the library during the last year.") or the wifi uses in 652 (unless the device is using a library provided cellular plan or library provided wifi).

Scott Dermont (IA)

This is one of those questions that makes me wonder why we are still counting it. I'm sure that 10 or 15 years ago this could be valuable data. But now I wonder what use it is to know if libraries have computers with Internet access. Of course they do. Ipads and desktop computers provide a very similar service. But I would contend that they have a completely different infrastructure to maintain. How much space does it take to store 10 iPads or Kindles? Not much right? But what kind of floor space is needed to provide access to 10 desktop computers? It is a major space needs and service issue. What is it that

we are really trying to count, and what are we doing with that data? I think counting Internet computers and their use may be outliving its usefulness in its current form. Kind of like circulation - The devices and services have changed a lot, but our data element hasn't changed to keep up with it.

All that being said, I agree with Jamie's take on it. I would count an iPad for this element if it was taking the role of a desktop computer within the library. I would not count it if it was being checked out for home use. But maybe I'm being too restrictive.

Sam Shaw (NE)

Kristen/Joe,

If the devices circulate outside the library, my thought is that you wouldn't count the number of sessions in 651 (as Joe notes), but you would count the circulation in 550 (total circulation). On our survey, we also ask a state question under Library Collection about "other materials". The typical things that are reported here are cake pans, puzzles, games, tools, things like that, but I think the iPad, if it circulates, would also be counted there in the state part of our survey.

I have another library with iPads tethered in the children's section of the library that run on the library wifi. They count those under 650 and 652.

Kristen Stehel (UT)

Joe,

I meant circulating iPads in-house only. It's good to know that iPads can count as internet terminals, especially for libraries that don't have room for more desktop computers.

Thanks all!

Jamie McCanless (WI)

I'd want to be certain the iPad and its use are only counted in one element each:

- If it's used to check out one or more units of e-books, count it as one e-book (451). When checked out, that iPad is one use of downloadable content (552).
- If the iPad is part of the library collection that circulates to library users, it counts toward total circulation of materials (550). Here in Wisconsin, it also counts in the state-level "other materials" of the library collection.
- If the iPad is not part of the library collection and cannot be checked out but is available for public use, it counts toward Internet computers used by the general public (650) and uses of public Internet computers per year (651).

Certainly the space needs and support costs for tethered or mounted mobile devices are different than desktop computers, but they are included in planning. It may well be that Internet computers are eventually replaced completely by wireless Internet access. Until then, the data tells us about the trends involved. I can now begin talking about the availability and use of Internet access in libraries in specific

regions of the state in terms of increases and decreases of wireless and computer Internet data. That's kind of exciting.

Kristen Stehel (UT)

The scenerio is this:

Libraries have iPads for internet access, similar to laptops and desktops, otherwise identified as internet terminals.

I see there being a challenge of keeping track of who has an iPad or laptop in the library building since they are not stationary like desktops. It would be a safety measure to "checkout" an iPad or laptop to a patron in case they walk out of the building with it.

The intent would be to report iPads as an internet terminal not as a circulating iPad. The iPads would not be preloaded with e-books. They would be solely for internet access.

Thoughts? Solutions?

Joe Hamlin (MI)

I would count in,

- 650 it's an internet computer provided by the public library for public use. (the definition doesn't differentiate between plugged or wireless access).
- 651 each checkout would count as a session of use.
- 652 as use of the library's wifi resources would occur.

Thanks,

Jamie McCanless (WI)

Joe,

Including this in both 651 and 652 sounds like double counting to me. Why would we count an Internet-connected computer and the means by which it connects to the Internet separately?

Income & Expenditures

July 31, 2015

Question

Colleen Hamer (MT)

Hello all,

I'm hoping to get a sense of the types of quality controls in use regarding all of the income and expenditures elements.

1. For instance, I'm wondering if a great number your states have additional local elements to 1) provide detail and 2) get monies categorized correctly. E.g. we're thinking of dividing 300 Local Government Revenue into City, District & County ... any strong opinions on that one way or the other?
2. Based on the data (small dollar figures) it appears that we may have a good deal of misreporting in capital expenditures that should likely be in operating (we break down the single 405 Total Capital Expenditures into Building, Collection, Equipment and Other – I almost think this causes reporting in these capital categories that, if they had to simply characterize it as a capital expenditure they might place it (correctly) in operationg). Does anyone else have operating as opposed to capital reporting difficulties? And if so, what corrective measures help?
3. Also, we have disparity between Operating Income and Operating Expenditures; same for the capital side. Nothing to worry about? From my reading of the definitions these should be very close; i.e. we had this income to cover these expenses. I interpret the capital definitions to say that unless the income/revenue is expended it shouldn't be listed as revenue? Should a guideline be that these two figures should be relatively similar? Anyone have percentage edits to guide this?

Any responses/discussion are welcome.

SDC Comments

Michael Golrick (LA)

Here is what we ask for:

LOCAL REVENUE

Include all tax and non-tax receipts allocated by the city, parish, or library district and available for expenditure by the public library.

12.1 Ad valorem tax - Revenue received from the library's dedicated property tax.

12.2 General sales & use tax - Revenue received from dedicated or shared taxes imposed upon the sale or consumption of goods and/or services.

12.3 Other local revenue - Revenue received from local government in the form of grants or grants in aid, local shared revenue, and local payments in lieu of taxes. Include also penalties and interest on delinquent taxes and other miscellaneous taxes that cannot be classified in either of the above. Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donations.

12.4 TOTAL Local Revenue - Totals are automatically calculated.

STATE REVENUE

All funds distributed to public libraries by the state, except for federal money distributed by the state.

12.5 State revenue sharing - Revenue levied by state government but shared on a predetermined basis with local government. Homestead exemption replacement.

12.6 State aid - State funds appropriated to the State Library for the annual program of supplemental grants to public libraries for the purchase of books, technology enhancements, and other specifically designated purposes. **The State Library is providing this figure. This field is locked.**

12.7 Other state revenue - All other state revenue, including such as Division of the Arts grants.

12.8 TOTAL State Revenue - Totals are automatically calculated.

FEDERAL REVENUE

All federal funds distributed to public libraries, including federal monies distributed by the state.

12.9 Federal grants - Include such as LSTA grants.

12.10 Other federal revenue - All other revenue received from federal sources such as federal shared revenue, payments in lieu of taxes, entitlements, etc.

12.11 TOTAL Federal Revenue - Totals are automatically calculated.

OTHER REVENUE

All other operating revenue not reported in the preceding categories, including fees, fines, interest earnings, and monetary gifts and donations.

12.12 Fees & fines - Revenue from all fees, charges, and commissions for services and activities, including nonresident and temporary borrower fees, loan charges for certain library materials, etc. Include also revenue received from fines and penalties for overdue, lost, or damaged materials.

12.13 Use of money and property - Revenue derived from the investment of money (interest earnings), from the use (rent/lease income) or from the sale of land or other fixed assets.

12.14 Gift & donations - Monetary gifts and donations from private sources— individuals, groups, and Friends. Include also corporate giving and foundation grants, as from the Gates Library Foundation.

12.15 Other financing sources - Proceeds from general long term loans or bonds; proceeds from sale of assets; compensation for loss or damage to assets (insurance recovery); proceeds from sale of investments; refunds of expenditures; expendable trust receipts, and other revenue not properly classified in any of the preceding categories.

12.16 TOTAL Other Revenue - Totals are automatically calculated.

12.17 TOTAL OPERATING REVENUE - Totals are automatically calculated.

12.18 FUND BALANCE/RESERVE FUNDS - This should include all funds which are in an account dedicated for Library use. It should have the excess from all prior year operations reduced by any operating deficits.

Part XIII FINANCIAL REPORT - OPERATING EXPENDITURES

Operating expenditures are the current and recurrent costs necessary to support the annual provision of library service. Report only actual expenditures supported by documentation such as invoices, contracts, payroll records, etc. Do not include capital expenditures in this category.

STAFF EXPENDITURES

Salaries, wages, and employee benefits paid from the library budget for the fiscal year for all staff including plant operations, security, and maintenance staff. Report salaries and wages before deductions (i.e. withholdings).

13.1 Director's salary - Salary of the library administrator.

13.2 All other salary & wages - Salaries and wages for all other library employees.

13.4 Employee benefits - Benefits outside of salaries and wages paid and accruing to employees. Report only the portion of employee benefits paid from the library budget. Include Social Security, retirement, medical and life insurance, guaranteed disability income protection, unemployment and workmen's compensation, tuition, and housing benefits.

13.5 TOTAL Staff Expenditures - Totals are automatically calculated.

COLLECTION EXPENDITURES

Report annual, recurring expenditures from the operating budget for library materials in print, microform, electronic, and other formats, which are considered part of the collection, whether purchased, leased, or licensed.

13.6 Books & other print material - Expenditures for the following print materials: books, paperbacks, government documents, and any other print acquisitions. Include here the cost of any books leased.

13.7 Serials in print - Expenditures for current serial subscriptions and serial back files in print format.

13.9 Electronic materials - Expenditures for electronic (digital) materials such as for the following: e-books, e-serials, e-journals, e-government documents, databases (including locally mounted databases), e-reference tools, and any electronic or digitized files, scores, maps, or pictures including materials digitized by the library. Electronic materials can be distributed on magnetic tape, diskettes, computer software, CD ROM, or other portable digital carrier, and can be accessed via a) a computer, b) the Internet, or c) an e-book reader. Include expenditures for materials held locally and for remote electronic materials for which permanent or temporary access rights have been acquired. Include expenditures for database licenses. (Note: Based on ISO 2789 definition).

13.10 Audiovisual materials - Expenditures for audio, video, DVD, compact disks, films and any other such format. Include here the cost of any AV materials leased.

13.11 Other library materials expenditures - Expenditures for microforms, art prints, etc.

13.13 TOTAL Collection Expenditures - Totals are automatically calculated.

OTHER OPERATING EXPENDITURES

Report all other annual, recurring operating expenditures, excluding expenditures for staff and collection.

13.14 Utilities - Expenditures for telephone, electricity, gas, water, waste disposal, Internet services, and other public utility services.

13.15 Contractual maintenance services - Expenditures for custodial, janitorial, security, and other services procured independently by contract or agreement with persons, firms, corporations, or other governmental units.

13.16 Professional services - Expenditures for legal, accounting, engineering, architectural, or library consultant services, etc.

13.17 Insurance & surety bonds - Expenditures for fire, theft, casualty, general, professional liability, and motor vehicle coverage, etc.

13.18 Training, education & travel - Expenditures for transportation, mileage, lodging, meals, and registration fees for continuing education programs and conferences and other similar expenditures incurred while on official government businesses.

13.19 Furniture, machinery & equipment - Expenditures for library, office, building, grounds, furniture machinery, and equipment for existing facilities. Include such items as shelving, tables, chairs, photocopiers, desks, microfilm readers, lawnmowers, etc. Exclude such expenditures for new or greatly expanded outlets—reported as Capital Expenditures.

13.20 Electronic access - Expenditures for electronic access equipment and ongoing costs related to electronic access for existing facilities. Include maintenance contracts, staff software, anti-virus and filtering software, “replacement” computers and peripherals such as printers, modems, and scanners. Exclude capital expenditures such as for new automation systems and other electronic access expenditures for new or greatly expanded facilities reported in the “Capital Expenditure” category. Exclude also database licensing reported in the “Collection Expenditures” category under “Electronic Materials Expenditures”.

13.21 Statutory payments & contributions to retirement systems - Expenditures for payments to sheriff and assessor mandated by various Louisiana statutes. Include deductions from revenue for tax collection costs.

13.22 Bookkeeping, accounting, & auditing - Expenditures for bookkeeping, accounting, and auditing services are listed here. These charges may be from parish or municipal governments or from a service provider hired directly by the library.

13.23 Grants - Expenditures for contributions made to another governmental unit. Include payments to Bayouland, Green Gold, Trail Blazer, and Libraries Southwest.

13.24 Tax election - Expenditures for costs of tax election paid from library’s budget.

13.25 All other operating expenditures - All other expenditures not specified in any of the preceding expenditures categories. Include expenditures for the following: membership dues, messenger and delivery service, advertising, printing, duplication, binding, postage, building rentals, maintenance of property and equipment, minor repairs, materials and supplies (stationery, forms, paper including computer paper, ribbons, disks, library processing materials), motor vehicle supplies (oil, antifreeze, etc.), small tools (rakes, shovels, weed eaters, hand tools, etc.), debt service, etc.

13.26 TOTAL Other Operating Expenditures - Totals are automatically calculated.

13.27 TOTAL OPERATING EXPENDITURES - Totals are automatically calculated.

Part XIV Capital Revenue

Please provide all sources of revenue during the current year for what your governing unit calls “Capital” items. Capital is defined by your local governing authority.

14.1 Local capital revenue - List all capital revenue from local sources including directly from the parish jury or the proceeds from an election.

14.2 State capital revenue - List all capital revenue from the State of Louisiana or any state agency.

14.3 Federal capital revenue - List all capital revenue from federal sources including directly from any federal government agency.

14.4 Other capital revenue - List all capital revenue from all other sources not listed.

14.5 TOTAL CAPITAL REVENUE – Totals are automatically calculated.

Part XV Capital Expenditures

Please provide all expenditures during the current year for what your local governing unit calls “Capital” items.

15.1 Land

15.2 Buildings

15.3 Motor vehicles

15.4 Furniture, machinery & equipment

15.5 Electronic access

15.6 Collection

15.7 Major repairs

15.8 Professional services

15.9 Construction in progress

15.10 All other capital expenditures

TOTAL CAPITAL EXPENDITURES – Totals are automatically calculated.

Hope this helps.

Michael Golrick (LA)

Hi-

I forgot to mention that revenue and expenses do not need to match. Indeed, I would be suspicious if they did.

For my libraries, there is often no capital revenue at all, and the capital expenditures come out of the accumulated reserves, which builds by having more revenue than expenses.

Kathy Sheppard (SC)

South Carolina libraries are county-based, and all comparisons and calculations are based on county tax dollars per capita, so it’s important for us to break out municipal funding.

Note that the PLS definition of “capital” covers collection and equipment for new buildings only, not for ongoing/annual expenditures. Some jurisdictions may think of the overall library collection as “capital” for insurance purposes, but annual expenditures for materials and most equipment belong in operating, not in capital.

Revenue will never match expenditures although a very small library on a very tight budget might be able to account for every penny. Local governments have oddball funding, non-recurring funding, varying rules about carryover, and weird auditing practices. We don’t have time, staff, or a state mandate to monitor libraries that closely, and (thank goodness!) states are not required to balance funds in the PLS.

Hope this helps—

Colleen Hamer (MT)

Thank you all very much.

There is a good deal to think about for these money items. I appreciate all the information and clarifications.-

Rob Geiszler (VT)

Hi Colleen,

I'd like to address your question #3:

I was having a lot of trouble making sense of our libraries' reporting. They'd have tremendous expenses and no income to support them, or in a few very rare cases, there was income that didn't seem to be supporting any expenses. Several years ago, I added a few new sections to our report. I added this section to our revenue side:

Transfers:

D10 Record here funds transferred from the principal or interest of any trust or endowment fund or investment or savings account which were 1) owned by the Library or Library Board, or over which the Library or Library Board had exclusive control and 2) disbursed into the general operating fund and expended on normal operating expenses or expended directly for normal library operations. Do not include: 1) any interest or other earnings which were retained in the trust, endowment, investment or savings account to accumulate; 2) any interest or other earnings which were retained, although earmarked for future use and not expended in the current fiscal year for normal library operations; 3) funds that have been transferred for capital improvements; 4) income from regular bequests, funds or trusts of which the library is a beneficiary, but over which the Library has no control. (These regular bequests or trust funds received as a beneficiary should be recorded above in "Other Local Income" (line D08)

Help For Question D10

This section is included to allow libraries to account for funds which the library owned or over which the library had control and which were moved from one account to another to be expended on normal operating expenses or which were simply expended on normal operating expenses. That is, this is NOT new money raised or contributed in the last fiscal year and spent on normal operating expenses, but "old" money raised in prior years which has been tapped this year for these normal operating expenses. This may help to explain disparities in expenses and revenues. If there were no transfers, enter "0".

The point here is that we know that some of our libraries are drawing from income sources that are not necessarily hit each year and that we don't want reported as "ordinary" income. Alternatively they may have dipped into savings, or may have raided endowment because of a peculiar expense, but not necessarily a capital expenditure. The way I try to explain this to librarians is that if they've tapped "old" money, there's no other place to report this. Now, I've given them that place.

Then when I get to the end of the expenses report, which is basically the end of all the financial information, I have this section:

Reconciliation:

F15 The amount shown on Line D11 has been entered here (Total Operating Revenues, above):

F16 The amount shown on Line F11 has been entered here (Total Operating Expenses, above):

F17 Subtracting line F15 from line F16 above leaves:

F18 The percentage of line F15 that Line F17 constitutes has been calculated here:

The above sections do not constitute a balance sheet. Nonetheless, Total Income should be approximately equal to Total Operating Expenses. There may be unusual circumstances that have influenced your finances. If the absolute value of the percentage on line F18 is greater than 15%, what factors would explain this difference? Were there unusual revenues? Did you have unusual expenses? If the absolute value of the percentage on line F18 is greater than 15%, please give an explanation in the State Edit Check for this question. (See the help for this question for further information)

Help For Question F18

This report is not a balance sheet, so the total expenses and total revenues may not be exactly equal. As indicated, however, your expenses and revenues should come somewhat close to balancing. If your income and expenses do not seem to align, please explain any peculiar circumstances which might explain the inconsistencies. For example, you might have begun the year with a sizeable balance left from your last fiscal year for which there isn't any accounting in this report. Or, perhaps you had expenses which came due at the end of the fiscal year for which you will account in your next fiscal year. If there is an inconsistency that is not clear to you, consider reviewing your entries for possible entry mistakes. If the entries you have made are accurate, but out of range, you will need to add an explanation in the State Edit Check. If you have questions please contact Rob Geiszler at (802) 786-3839 or rob.geiszler@state.vt.us.

This gives the libraries an opportunity to review what they've submitted, but if there are strange circumstances, they can report that to me in the survey, rather than having some sort of follow-up phone call.

This doesn't necessarily go into the Federal reporting, which doesn't seem to include any worry about these inconsistencies, but on the state level, I'm a lot more comfortable in making sense of where these libraries stand.

I'm not delighted with my verbiage, but I've spent enough time with our librarians, that they understand what I'm after. This has smoothed out a lot of the disparities, over the years.

Jamie McCanless (WI)

Colleen,

Operating Revenue. In Wisconsin, we collect:

1. Local Municipal Appropriations for Library Service
2. County
 - a. Home County Appropriation for Library Service
 - b. Other County Payments for Library Service
3. State Funds
 - a. Public Library System State Funds *
 - b. Funds Carried Forward from Previous Year
 - c. Other State Funded Program
4. Federal Funds
5. Contract Income (form other governmental units, libraries, agencies, library systems, etc.)
6. Funds Carried Forward (not including state aid)
7. All Other Operating Income

* In Wisconsin, state aid is distributed to our regional public library systems.

We track municipal and county funding individually because we have: an elaborate system of county payments for nonresident use; and municipal, joint municipal, city-county, and county libraries. Even if we didn't, the distinction lets us look at trends in municipal and county funding.

Capital revenue and expenditures. We defer to the municipalities' requirements/practices. Our instructions read:

1. Capital Income and Expenditures by Source of Income

Enter capital revenues and capital expenditures by source of revenue for the year just ended. Report all revenue to be used for major capital expenditures and all capital expenditures. Include funds received for:

- Site acquisition
- New buildings
- Additions to or renovation of library buildings
- Furnishings, equipment, and initial collection (print, non-print, and electronic) for new buildings, building additions, or building renovations
- Computer hardware and software used to support library operations; to link to networks, or to run information products
- New vehicles
- Other one-time major projects

Exclude funds received for:

- Replacement and repair of existing furnishings and equipment
- Regular purchase of library materials
- Investments for capital appreciation
- Capital projects in the previous year but unspent in 2014

Income vs. expenditures. I do ask about very large differences between operating revenue and expenditures to check for data entry errors, but otherwise only ensure that reported total operating expenditures are not greater than total operating revenue.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov.

Sam Shaw (NE)

Hi Colleen:

Nebraska:

Local Government Revenue

- City/Village
- Township
- County
- Other Local Government Revenue
- Total

State Government Revenue

- State Aid
- Grants
- Total

Federal Government Revenue

- Federal Library Improvement Grant (LSTA)
- Other
- Total

Other Revenue

Capital Revenue

- Local
- State
- Federal
- Other
- Total

Yes, like most others there are sometimes differences in capital revenue/expenditures that you mention in your number 2 below. Generally, when the surveys are reviewed before locking, those fields are looked at and then the library director is asked what the expenditure was for. Sometimes, they report capital revenue but not expenditures, but more often a capital expenditure but not revenue.

"Debt Service" and Annual Statistical Report

August 17, 2015

Question

Kristen Stehel (UT)

Hi all,

Does anyone have experience with libraries reporting "debt service?" Or on the state level, do any of you include a line item for this in your annual survey/report?

Any assistance would be appreciated.

SDC Comments

Jamie McCanless (WI)

Hi, Kristen

In Wisconsin we have a state-level item for debt retirement in the section for capital revenue/expenditures. (Generally, calculations exclude expenditures from federal funds, capital expenditures and debt retirement/service from total operating expenditures.) Unfortunately, the source of funds used for debt retirement can be difficult to identify from our data. County funds, municipal funds, or a combination of the two can be used, which makes checking reported revenue against local and county appropriations very approximate.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov

Jay Bank (KY)

Kristen –

Kentucky has debt service as an item in our report. It is standalone – not added to expenditure totals.

Defined as “The cash used in the repayment of interest and principal on a debt. This includes outstanding loans or outstanding interest on bonds or the principal of maturing bonds that count towards the library's debt service.”

Robert Keith (NJ)

Greetings,

New Jersey libraries are not allowed to pay debt service, therefore we do not ask that question on our survey.

Michael Golrick (LA)

Hi-

Louisiana would categorize it as "Other Capital Expenses." The Kentucky definition is what I have told folks. That being said, only one or two libraries have ever financed in that way. Most pay for capital expenditures from the "Fund Balance." One of our really large libraries recently paid for its new main library from the fund balance. In Louisiana one critical item is the way that the ballot question for the tax is phrased. Some libraries have separate taxes for building buildings and maintaining them, while others have a single tax for both operations and maintenance.

Circ staff??

August 20, 2015

Question

Joy Garretson (MS)

Hey all! I just had a lively debate (translation: uncontrolled!) about who counts as librarians and who counts as "others" when looking at staff members. Our main contention was with paraprofessional circulation staff. How do you classify them? In a state with very high numbers of paraprofessional staff, I want to be careful how I tread here.

I also have a question about Freading: my librarians are telling me that downloads have a 2-week circulation period. Previously, I'd been counting this as a database, but now I feel like the patron-driven acquisitions could be reported under E-Books (though the cost difference between an e-book from overdrive and an ebook from Freading is a problem). I had been reporting patron-driven acquisitions in a special category under databases, but I'm not sure that this works anymore. I know we've been discussing this for ages, but I could really use a super laserbeam definition now. Help!

SDC Comments

Michael Golrick (LA)

Here is how I ask the questions:

All ALA/MLS degreed staff: Librarians with master's degrees from programs of library and information studies accredited by the American Library Association.

Other professional level staff: Staff who perform work that requires professional training and skill in the theoretical or scientific aspects of library work, as distinct from its mechanical or clerical aspects. Include the director without the MLS and others who hold the title of librarian, such as library associates.

All other paid staff: All other staff paid from the library budget including plant operations, security, and maintenance staff.

That is also how they are reported in the report I do for the state data. For each of those categories, I ask for the number of staff, and for the total number of hours worked by all staff in that category in a given week. (I then do the FTE calculations for submission.)

I can't think about #2 right now...I am about to try to shove stuff back into a can of worms opened by a clarification about e-book circulation. (Some libraries in a consortium reporting use very high, others low....)

Cathy Van Hoy (OK)

Hi All,

In Oklahoma I use the same definition but not everyone interprets the same way. So in small libraries I say, if the person helps the public in any way or copy catalogs, count them as a librarian. In larger libraries where staff have "distinct" titles, I let them decide but if pressed I say if they spend over 50% of their time helping the public, etc. they are librarian - if it only happens when short staffed or filling in, no. Normally shelvers & circ staff are not librarians (though they help people all the time - ha!)

Cecilie Maynor

Hi Joy

This is how we count them:

Librarians with Master's Degree (MLS/MLIS)

Librarians with Master's Degree (ALA accredited MLS or MLIS) from ALA accredited program of library and information studies.

Other employees holding the title of Librarian

Other employees holding the title of Librarian who do work that required professional training and skill in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. This would include, but is not limited to, graduates of the state sponsored Public Library Management Institute and any others who hold the title of Librarian, Manager, Director, Administrator, Head Librarian.

Other paid library staff (except plant operations, security, custodial, and maintenance)

Other paid library staff (except plant operations, security, custodial, and maintenance). This could include circulation clerks, library assistants, etc.

Not sure about your Freading question. I am holding our annual Survey Review Webinar tomorrow and I am hoping to avoid intricate questions like that...

Good luck!

Sam Shaw (NE)

Hi Joy:

I think Cecilie's definition below is word for word the [federal definition](#) (251), so if the person doesn't have "librarian" in their title, it might depend on whether or not they are required to have "professional training and skill in the theoretical or scientific aspects of library work". Now you can debate *that* word salad.

As for number 2, it seems like under the new definition of eBooks, since these have a circulation period they get counted as eBook holdings **and** eBook circulations. If you count one, you count the other under the new definition. See Laura Stone's ([attached](#)) cheat sheet. A number of posters have previously pointed out the difficulty in calculating these numbers for holdings, since the library doesn't specifically select them like other eBook vendors. The method I know of is to count each downloaded eBook both as circulation and as a holding, when selected by the patron. (e.g. patrons select 1,000 eBooks to checkout--count 1,000 for holdings (element #451) and 1,000 for circulation (element #552). Or, to put it another way, 1 download=1 use and 1 holding.

FYI the **old definition** included "Report only items the library has selected as part of the collection."

Terry Blauvelt (MO)

Missouri is counting Freading the way Sam outlines it below (1 circ. Equals 1 holding).

As far as the librarians, we count librarians, ALA-MLS Librarians, and Total Librarians.

Joy Garretson (MS)

Thanks for all of the help, guys (and gals)! As far as the circulation staff issue goes, so many of our paraprofessional staff members have titles like "library assistant," "circulation assistant," etc., but these people are not only doing basic level search/retrieval of materials and checking in and out of materials, they're also giving customer service, answering ready reference questions, etc. I like Cathy's suggestion that if over 50% of their time involves helping the public, they're a librarian. I'm going to ruminate on it a little more. I gave my library directors the definitions you all listed that you use (we use them too), but the contention came from a contentious contentor (ha) whose goal yesterday ***might*** have been to stump the presenter.

I'm not debating any word salads, but I am definitely stealing that phrase for my lexicon!

As for the E-book thing, for now, I am going to leave my state's question about number of items accessed under databases, even though those items now technically circulate. Here's my reasoning: They pay maybe \$.50 per item (as opposed to much higher prices for other e-books), they don't have much to do with the collection of the items, and the items—though accessible to all of them by searching on Freading—aren't to me directly comparable to a book collected by a collection developer. However, instead of wording these as "E-Book Downloads," I'm going to call them patron-driven acquisitions and let that be the category they live in (somewhere between a permanent part of the collection and a database item).

Most days, I love technology, but yesterday and today, I kindof hate it.

I am happy to report, though, that after yesterday's workshop, there was a literary pub crawl in honor of the upcoming Mississippi Book Festival (First annual! Speakers include MS authors John Grisham and Ellen Gilchrist among others!), and I was able to wash all of my statistical woes away while sipping on

July 19, 2016

bourbon and playing trivia games that involved guessing what famous authors liked to drink. Who knew that Larry Brown was so into peppermint schnapps??

~fin.

Question about Data Element 450

September 2, 2015

Question

Kristen Stehel (UT)

Definition 450 says, "Books are non-serial printed publications (including music and maps) . . ."

About that definition the following is written, "This section of the survey (450-460 collects data on selected types of materials. It does not cover all materials (i.e., microform, scores, maps, and pictures) for which expenditures are reported under Print Materials Expenditures, Electronic Materials Expenditures, and Other Materials Expenditures (data elements#353, #354, #355).

My question is: Are bound scores of music included under Print Materials and non-bound scores included in Other Materials?

Let me rephrase my question:

Since there isn't an "Other Materials" data element within the collections section (450-455), where would non-bound scores be reported?

SDC Comments

Michael Golrick (LA)

Non-bound scores are not counted and reported on a national level.

Now, that does not mean that you can't count them in your state. My collection are (with the instructions *I* give):

Part VIII COLLECTION

Report total items (physical volumes or electronic units) held in all outlets in each category as of year's end, including duplicate items. Report all items that have been acquired as part of the collection and catalogued, whether the items were purchased, leased, licensed, or donated as gifts. Items packaged together as a unit (e.g., a multi volume set) and are checked out as a unit should be counted as one unit. For smaller libraries, when volume data are not available, title information may be substituted.

8.1 Adult books & other printed items – Report adult and young adult books and other printed publications (e.g., music, maps, non-serial government documents, etc.) that are bound in hard or soft covers or in loose-leaf format.

8.2 Juvenile books - Report juvenile printed non-serial publications of any length.

8.3 Serial volumes in print - Report serial back files in print held in all outlets, including duplicates. Count unbound serials as a volume when the library has at least half of the issues in a publisher's volume. Serials are publications issued in successive parts, usually at regular intervals that are intended to be continued indefinitely. Serials include periodicals (magazines), newspapers, annuals (reports, yearbooks, etc.), journals, memoirs, proceedings, and society transactions, numbered monographic series, and government documents and reference tools that are issued as serials.

8.5 Electronic books (e-books) - Report digital documents (including those digitized by the library) that are a) analogous to printed books, b) are listed in the library's catalog, and c) are loaned to patrons on e-book readers or via transmission to a patron's personal computer. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired. Report for all outlets. Include duplicates.

8.6 Audio materials - These are materials on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically, electronically, or both. Include, records, audiocassettes, audio cartridges, audio discs (including both compact disks and audio-DC-ROMs), audio reels, talking books, and other sound recordings such as web-based or downloadable audiobooks and MP3 files. Report the number of units, including duplicates. Items packaged together as one unit (e.g., two or more audiocassettes for one book) and checked out as a unit are counted as one unit. For electronic units report only the items the library has selected as part of the collection and are made accessible through the library's Online Public Access Catalog (OPAC).

This year the question is divided into number of physical units and number of downloadable units.

8.7 Video materials - These are materials on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver or monitor. Video formats may include tape DVD, CD-ROM, web based or downloadable files, etc. Report the number of units, including duplicates. Items packaged together as one unit (e.g., two or more video cassettes for one movie) and checked out as a unit are counted as one unit. For electronic units report only the items the library has selected as part of the collection and are made accessible through the library's Online Public Access Catalog (OPAC).

This year the question is divided into number of physical units and number of downloadable units.

8.8 Electronic databases - Report databases, locally mounted or remote, full-text or not, for which temporary or permanent access rights have been acquired. A database (usually related to a defined topic or intent) is a collection of electronically stored data or unit records, (facts, bibliographic data, abstracts, texts) with a common user interface and software for retrieving and manipulating the data. A database may be issued by direct method such as on CD ROM or diskette, or as a computer file accessed via the Internet or a dial-up method. Report number of database licenses (subscriptions or one-time purchases). Count each licensed database

individually even if several databases are accessed through one interface. Totals are automatically calculated.

8.8a Databases provided by the State Library - [This items is locked. You cannot change it].

8.8b Databases provided by parish library - Report databases, locally mounted or remote, full-text or not, for which temporary or permanent access rights have been acquired. A database (usually related to a defined topic or intent) is a collection of electronically stored data or unit records, (facts, bibliographic data, abstracts, texts) with a common user interface and software for retrieving and manipulating the data. A database may be issued by direct method such as on CD ROM or diskette, or as a computer file accessed via the Internet or a dial-up method. Report number of database licenses (subscriptions or one-time purchases). Count each licensed database individually even if several databases are accessed through one interface. Include databases provided by the State Library. Include only databases not provided by the State Library.

8.9 All other library materials - Report all other items not properly categorized previously but which are considered part of the collection and are made available through the library catalog. Include serial volumes on microfilm, all other microforms, films, etc.

8.10 TOTAL COLLECTION - Totals are automatically calculated.

8.11 Total items added to the collection during the reporting year, all formats

8.12 Total items withdrawn from the collection during the reporting year, all formats

My vendor then does a mapping from the specific items to the data elements reported to the feds. So for my libraries, they can count scores in 8.9, but those are not reported to Census/IMLS.

In a recent conversation I had, someone (maybe Scott from Iowa) said, and I like this quote: "Part of why we ask questions is 'to give the library credit, and those libraries really want that credit.'"

Maybe that helps? Remember that there are some things you may want to count for the state that you won't report to the feds. (I also collect circ by main library, branches, and bookmobile. I collect program numbers for bookmobiles also.)

Kathy Sheppard (SC)

This is so weirdly coincidental. I had very much the same question today from a library but our problem is with a contradiction in the survey instructions – these need revision, I think, if we are getting questions about it.

COLLECTION EXPENDITURES on p. 47 of the WePLUS Version 1.9 Manual covers "...all materials in print...and other formats considered part of the collection..." So it's clear that a library can purchase any print form of music and include that expenditure in 353. Under the COLLECTION EXPENDITURES heading, 353 Print Materials Expenditures includes expenditures for "any other print acquisitions."

Music is not mentioned specifically anywhere in Sections 353 through 358 but it is later mentioned in the LIBRARY COLLECTION section heading as an expenditure to be reported in 353.

LIBRARY COLLECTION on p. 49 of the Manual instructs to report data on “selected types of materials” but not ALL materials (“i.e. microform, scores, ...”) That is, scores are eliminated from eligibility to be counted as a “selected type of material” in 450-460.

And here’s the contradiction: Under that same heading, 450 Print Materials instructs to include in the reported figure “...music...that [is] bound in hard or soft covers or in loose-leaf format.”

Restating that contradiction, “scores” are specifically mentioned in the LIBRARY COLLECTION heading paragraph as NOT to be included, while “music” in various bindings SHOULD be included in 450.

Is there a difference between a printed score and bound music? I don’t know why this hasn’t come up before. Maybe it’s clear to everyone else? What am I missing?

In any case it would be helpful to revise this language. Either we remove “music” as an eligible collection under 450, or we remove the statement in the paragraph heading that makes it an ineligible collection. Or we define clearly what is meant by “music” and by “score” that requires different counting practices for each. I’m not sure if there are additional considerations – maybe some of our folks with extensive music collections can weigh in on this?

Michael Golrick (LA)

I think that the distinction about music was more important in the past than currently. Some of us are old enough to remember “sheet music” which was (is?) the arrangement of a musical composition (song, most often) which was sold as a separate item. It was usually 4 to 10/12 pages. It was often printed like a newsletter. A “score” was more often bound or in those awful spiral bindings. It would be for all the music in a musical (for example), or a complete symphonic work. It was “substantial.” Back in the day, there would be public libraries which would have collections of sheet music for folks to check out (often as vertical file material – remember that?). So they were allowed to count the cost of purchasing, but not “inflate” the size of the collection by counting each sheet music song as an item. That is what I suspect is going on.

This *is* the time of year when we can fix that kind of thing.

Kathy Sheppard (SC)

That’s what I thought.

I have submitted a proposed revision to LIBRARY COLLECTION/450 Print Materials on the wiki.

COUNTER - Counting Online Usage of Networked Electronic Resources

September 4, 2015

Question

Cathy Van Hoy (OK)

I've just briefly looked at this but has anyone else dived into this in detail? Would this be helpful to us in any way?

COUNTER - Counting Online Usage of Networked Electronic Resources

<http://www.projectcounter.org/>

Standardized Usage Statistics Harvesting Initiative

<http://www.niso.org/workrooms/sushi/>

SDC Comments

Laura Stone (AZ)

Cathy,

Yes, I think this is very helpful. As we work on revising electronic definitions, we need to look at COUNTER compliance, and other standards.

Joe Manion (MN)

Hello Colleagues,

I agree. It would be helpful to have a list of vendors that are Counter or SUSHI compliant. We could compare vendors and learn more about usage patterns. Standards are good.

Stacey Malek (TX)

I believe NISO also has definitions around electronic measures. I think they are aimed more at academic libraries, but could be helpful, as well.

Data element 456-458: Databases/Electronic Collections question

September 29, 2015

Question

Kristen Stehel (UT)

Hi all,

I had the following question come through in regards to the statistical annual report:

Is EbscoHost one unit since it has integrated searching (MasterFile, ERIC, Agricola,etc)?

Has anyone encountered any other questionable databases as far as whether they are counted as multiple or single units?

Any help with this would be greatly appreciated.

SDC Comments

Laura Stone (AZ)

Kristen,

Yes, I think this is a big issue, and a primary reason that we're proposing eliminating the count of databases. For now, I would advise the library to count what is presented to the public on the library's website as a database/electronic resource – so if the library's electronic resource page lists only EbscoHost, just count one. If the library lists multiple products, count those.

This is an issue for a number of the commercial database products, including Ancestry and Reference USA as well.

Cathy Van Hoy (OK)

Yes I agree. Oklahoma libraries don't care how many databases they have per se but they want the use of the databases counted – how is still an issue. But I refuse to count it as "circulation" – really? Ha!

Jamie McCanless (WI)

I know this question generates a lot of discussion but if you're using the current PLS definitions, the definition of the number of licensed databases reads, in part:

"Each database is counted individually even if access to several databases is supported through the same vendor interface."

Sam Shaw (NE)

Hi Kristen:

I'm wondering -- isn't EbscoHost just a federated search tool (that allows the user to search multiple databases at once)? I'm thinking that the library filling out the report would be aware of what specific databases are searched via EbscoHost. We have Explora (which I think is similar to EbscoHost). When I click on the ? next to the Explora link, I get this:

Contents:

- Explora Public allows users to simultaneously search or browse the following databases via a colorful, student-friendly interface:
 - Biography Reference Center
 - Consumer Health Complete
 - GreenFILE
 - Legal Information Reference Center
 - MasterFILE Complete
 - Primary Search
 - Topic Overviews Public Libraries

So in this example, I would probably count that as 7 databases.

Sam Shaw (NE)

Cathy/Laura:

I was thinking about this thread of e-mails and am wondering out loud if counting the number of databases....er, I mean, *electronic collections*, in addition to use does a better job of putting things in perspective. Example: library A reports 1,000,000 database uses and library B reports 1,000. However, library A subscribes to 30 databases and library B subscribes to 2. On an even more relevant level (state level), libraries can be accredited by our state our library commission (it's a requirement for them to receive state aid) and that accreditation process uses peer library comparisons (usually libraries within 15% of the LSA). So, if I'm a director for library A, I most likely would want to know what specific databases my peers are subscribing to and how many times those databases are used. One big total number doesn't do much for me. That specific data becomes more relevant, as library A can analyze the reported data (the name of the database, if available, and the number of uses). If, for instance one of my peer libraries subscribes to Zinio (and I also do), but they have 1,000,000 uses and we have 100,000, then I guess I'd be asking myself what are they doing differently than us. I think this type of data is relevant to them even if libraries aren't accredited.

Just my thoughts on this subject (at least today---that may change of course).

Data Element #652 (Wireless Sessions – Annually)

November 6, 2015

Question

Kristen Stehel (UT)

Here is the issue I received from a large library system, Salt Lake City Public Library:

"I have been trying to determine a number for the survey for # 652 Number of times (sessions) patrons used the wireless network.

I do wish they would be more specific. We have two wireless networks for patrons. The don't login they connect. They could be on for 1 minute or 12 hours. I was going to use our 3 months count of how many people were counted all locations using a non-library device. This is an hour count not a session count. Do you have any clue what the intent of this question is? For example how many hours of use your WIFI got or simply connections. There is a huge difference in reporting these figures. If I am looking at hours I am going to give you 293.750 hours. If I am giving you a snap shot on connects to WIFI it will be it will be about 45% percent of that number."

SDC Comments

Laura Stone (AZ)

Hi Kristen,

While I agree that this definition is not detailed, it does say "wireless sessions provided by the library." I think this includes both sessions that a patron must login for, and sessions that are connections into the wifi.

I would read/review 652 in parallel with 651, Numbers of Uses (Sessions) of Public Internet Computers Per Year. I think the intent is that a session will equate to a visit, but we all know that sessions are of different time lengths, and libraries manage them differently. Without asking for a spreadsheet of metrics, it at least gives us a snapshot.

Scott Dermont (IA)

Also, my understanding was that this count includes staff use of wireless. This is total wireless use, not just use by patrons.

Technology Lending question

November 10, 2015

Question

Amanda Johnson (NC)

In NC we have a question about technology lending that reads:

Technology lending is a service by which libraries lend technology (laptops, tablets, Playaways, cameras, MP3 players, etc.) to patrons for either in-house or out of library use.

146. Technology lending circulation

Circulation -- including in-house circulation and renewals -- of technology lent by the library to patrons (not to staff). Do not count circulation of non-technology items (such as gardening tools) here.

I have a library that is counting technology that is used as part of programming and I'm unsure if that should count. It is the patrons using the technology not staff, and per the definition in-house use can be counted but this still seems to be a bit of a grey area. Do any other states have a similar question or do you track technology that is used during programming?

SDC Comments

Bob Wetherall (DE)

Amanda,

I am not familiar with Data Element 146 (Technology Lending Circulation). I don't see it in the IMLS definitions for the PLS. What am I doing wrong?

Sam Shaw (NE)

Robert:

You are correct that there is no technology lending circ. national element. Amanda can verify but it sounds like the 146 she is referring to is something they collect at the state level.

Now for Amanda's original question. No, we don't have a similar question, we just collect the total circulation of non-electronic items. This would include only technology that is checked out and leaves the library and (using Amanda's definition below) things like garden tools that also leave the library. The federal element for this is 550 (total circulation). See below.

Seems to me that if the technology is just checked out for in-library use, that wouldn't count or meet the definition of a program; but some of it might be countable under 650/651/642 (Number of internet computers used by the GP/Number of uses (sessions) of public internet computers per year/Wireless sessions) depending on the situation.

550	Total Circulation	The total annual circulation of all library materials of all types, including renewals.
		Note: Count all materials in all formats that are charged out for use outside the library. Interlibrary loan transactions included are only items borrowed for users. Do not include items checked out to another library.

Flipster: Database or Magic Flying Unicorn?

November 10, 2015

Question

Joy Garretson (MS)

I just got this question:

1.) In 2015, our library began subscribing to several Flipster/digital magazines through Ebsco. We had a total of 43 print subscriptions and 52 digital magazine subscriptions, total subscriptions – 95. The annual report asks for the number of print subscription only. Should I report total print subscriptions is 43 and include a note that we have 52 digital magazines subscriptions? Where do I count the digital magazines?

My initial thought was to count Flipster as a database, but she told me that after patrons download the digital magazines, they can only view them for a limited amount of time. I don't have a spot for E-Magazines in my circulating collection numbers, and my E-Collections would count this out on the basis of non-permanent downloads.

What say you all?

(Laura Stone's handy list doesn't include Flipster. Perhaps further evidence that it should be classified as a magic flying unicorn!)

Other operating revenue and expenditures

November 17, 2015

Question

Kristen Stehel (UT)

Hi all,

What I have been experiencing as a new SDC is this:

Some libraries are reporting x amount of other operating revenue, then proceeding to report x in local operating expenditures (instead of other operating expenditures) because x revenue folds back into the city budget for the next year.

Is this okay for reporting purposes?

SDC Comments

Bob Wetherall (DE)

Amanda,

I am not familiar with Data Element 146 (Technology Lending Circulation). I don't see it in the IMLS definitions for the PLS. What am I doing wrong?

Laura Stone (AZ)

Hi Kristen,

Am I understanding that the libraries are reporting revenue that is really going to the city?

I think expenditures and revenue are tricky, and there's lots of grey area (I have a library that has its utilities paid directly by their Friends.) I would always go back to the definitions and review when trying to figure these out.

At the core, I work with the library to report revenue and expenditures that reflect what it costs to run the library that year. These numbers usually don't match exactly, but if they're not darned close, I want to understand why. In addition, AZ has a number of county library systems that provide cash and/or goods to municipal libraries located in the county, and I work with these libraries so that funds are only reported once – usually by the institution that actually drives the purchasing.

If the libraries are reporting the same funds twice, that means that their per capita revenue numbers will not be comparable to other libraries. It will look like they have more revenue than they really do. I would discourage the libraries from doing this.

What do others think?

Jamie McCanless (WI)

Kristen,

This would be a big issue in Wisconsin because our statutes require that public libraries have exclusive control over their funds. I understand, though, that some (many?) states don't have this protection.

If the libraries you describe are routinely returning municipal funding, those are not legitimate operating expenditures. They're not spending the money on anything. Surely an auditor would challenge the practice. On the revenue side, it would most certainly increase calculated per capita support artificially.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov

Katrice Stewart (FL)

Hi, Kristen!

I have to agree with Jamie on this one, particularly if they are indeed returning funds. Sounds like they are fluffing up their local operating expenditures likely to bolster state support. My guess is that they're trying to make sure all of their reports are matching yet getting the most bang for their literal buck. I would try, as Laura said, to work closely with them to resolve and have them use the proper categories ☺

Kristen Stehel (UT)

When I say the money goes back to the city, I mean it goes back to the library budget that is controlled by the city. I hope that makes sense.

Kathy Sheppard (SC)

So the money is reported as "other" operating revenue in FY14.

And some portion of it is reported as local expenditure in FY14?

Then if there is some left over in "other" operating revenue, that chunk rolls over into FY15?

And the library is reporting the rolled-over, previously "other" FY14 funds, as local operating revenue in FY15?

If that's the case, it is a problem for how they are reporting operating revenue, as carryover is not allowed per definition (see p. 45, OPERATING REVENUE, just above #300).

It sounds like they figure because it rolls over to the city and the city gives it back to the library, it is transformed into local funding. It is the carryover that is the problem.

Or am I missing something?

Jamie McCanless (WI)

Kathy,

I have to disagree about carryover. True, libraries mustn't report funds that were not spent in the previous year as operating revenue in the current year but that doesn't prohibit carryover – just reporting it in a subsequent year as "new" revenue.

My concern is that an amount is being reported as an operating expenditure that isn't an operating expenditure; it's an amount that's lapsing back to the municipality.

Kristen Stehel (UT)

From looking at past reports, many libraries have been reporting the same value in "other operating revenue" (303) as in "other operating expenditure" (304.4). Others have reported zero in both. Now there is this issue surfacing (as mentioned above) where x amount is reported in "other operating revenue" (303) and zero is reported in "other operating expenditure" (304.4). Because the other revenue is funneled back to the city for the upcoming library year budget, one library has said they will report the previous year's other operating revenue in the next year's other operating expenditure. I would imagine this has been an issue for a while though.

Kristen Stehel (UT)

Since seeing zero reported for both 303 and 304.4 for several libraries, I have begun questioning said libraries as to why they don't report things like library fines under 303, 304.3. One library who used to report zero in both fields has now reported around 27,000 in 303 and 304.4. That's a chuck of change. Their local operating revenue and expenditure just decreased from about 243,000 to about 205,000.

Jamie Mott (IL)

Kristen,

As a new SDC myself, I am finding several issues like yours. In my instances, I am finding that a differently worded question or definition really helps libraries figure out what to put where. We had a question worded "Local Government" under the heading "Operating Revenue by Source." Some libraries did not realize this meant their tax levy money and instead thought they should only put extra money they got each year from their local government.

Michael Golrick (LA)

Hi-

I saw this message the other day – I was at the IMLS Focus event, and almost asked the other data folks there what they thought, but decided to wait. I am glad I did.

I think that, among other issues, there is a confusion that revenue has to exactly match. First of all, we ask about where the money comes from, and where it goes. Most of my libraries are separate taxing entities, and therefore, when money is left over it goes into the "Fund Balance" or "Reserve fund" or, if you will, a roll over account. Not all money has to be spent in the year it was received – unless it is a grant, and that grant requires it.

What I am looking for (and sort of expect from the national stats), is sources of revenue by type and, on the other side, expenditures by category. Each of us has our own unique set of local quirks to the laws. Some, like Wisconsin's (for which I was once grateful), protect library funds from being used elsewhere. Others have more flexibility.

The basic rule that I know is: report it only once. As someone noted in the conversation, if you spend from your fund balance, that is not revenue in the year you spent it because you already reported it as revenue in the year you received it.

Maybe that helps? If it is not a pressing issue, it is a great topic for discussion when we meet in person in a few weeks.

Electronic magazines?

December 14, 2015

Question

Janet Eklund (NH)

NH State Library provides access to digital magazines through its downloadable books package with Overdrive. Should the total magazines and usage be reported and if so, where in the PLS?

The magazines don't "circulate" as they don't get returned after download, but they do get "checked out."

Thanks for input from the collective brain.

SDC Comments

Michael Golrick (LA)

I would count the use as database use, just like for articles from EBSCO ... the newly approved data element will capture that use.

Amy Heebner (NY)

I got the same question about Overdrive magazines last week. So as the survey stands now the library would just count Overdrive as a collection and nothing more (ie no circ, no individual titles)?

Just to clarify, if they were Overdrive books we would count them as e-books and count their circulation, correct?

Hoopla

December 15, 2015

Question

Thomas Ivie (WY)

I saw on the wiki a discussion from last year regarding Hoopla. I am as confused as ever on this one (database vs collection). Can anyone clarify for me? We have ask for "locally licensed electronic books." I want to say that if they can differentiate between movies, music, and e-books, then why not show count them. But the other side of my brain wonders if I should leave it alone because "database." Help

SDC Comments

Katrice Stewart (FL)

I'd say that if you can implement the new elements and folks can parse apart, then let 'em show it

2016

Guidance on Counting WiFi Uses, Again

January 7, 2016

Question

Sam Shaw (NE)

Hi SDC's:

I'm getting more and more questions about how to accurately count WiFi sessions/uses. I'd venture to say most libraries are using observation estimates based on a "typical day", which ultimately is resulting in low and inaccurate numbers. Most libraries don't have the resources or technology know-how to use higher end products or create splash pages. Last year I had a few libraries that successfully used the then free WhoisonmyWiFi (I think it's now \$15/month), but that allowed for only real time monitoring for the free version. A number of the routers in our libraries are lower end and (assuming the local staff have the capabilities) only offer (I think) real-time monitoring.

So my question is this: Are any of you aware (or can you garner some ideas from your IT department) about an easy method to accurately capture this data? It seems to me that there would be a low-cost or free downloadable tool that could be used to monitor and report numbers, without the need for someone to monitor things in real time.

Any help/suggestions/input much appreciated. Thanks.

SDC Comments

Michael Golrick (LA)

Hi-

This fell to the back burner for me. However, I did check with the IT folks here at the State Library. Here is what they said:

Several libraries have had success with a wireless solution from Meraki a Cisco owned company. Meraki provides management of wireless access points, statistics collections, splash pages etc. See link below.

<https://meraki.cisco.com/products/wireless>

Since I also am responsible for collecting our internal data, I can tell you that I get a nice email on the first of each month with the data for the prior month. That is what I use to populate the spreadsheet(s) which I need to update.

Electronic Materials

January 11 2016

Question

Amy Heebner (NY)

Under the current definition of electronic collections would a library's own digital collections count as collections under 456 (and if so, would it be one collection or could it count as multiple collections if they had multiple collections, ie city directories, scrapbooks, etc.)? The general instructions for electronic collections say that they should not count items freely available without monetary exchange, but the instructions for 456-458 say, "An electronic collection may be organized, curated and electronically shared by the library, or rights may be provided by a third party vendor. An electronic collection may be funded by the library, or provided through cooperative agreement with other libraries, or through the State Library."

SDC Comments

Jamie Mott (IL)

I think that the monetary exchange part is the key. If it is freely available and there is no monetary exchange involved, I don't think it counts regardless of what it is.

Mobile Hotspots

January 13 2016

Question

Lisa Hickle (OH)

A question I received is:



how to count the mobile hotspots that many libraries are circulating now. This Verizon Jetpack is an example:. Do the stats from these count in the wireless category? If not, how should these be counted?

Are you asking your libraries to include these and if so how/where?
Thanks!

SDC Comments

Terry Blauvelt (MO)

A hotspot is essentially a wireless router (to clarify: a router without a connection via cable), so I would count them towards annual wireless sessions.

Megan Schulz (KS)

In Kansas, we partnered with a NYPL project (and others) for a pilot project dealing with MiFi Router. Verizon Hotspots are circulated to patrons.

These are cataloged/barcoded like books and "Circulation of Electronic Materials" would capture this usage in the survey.

I am not aware that these are also be counted within the wireless question in our state since the checkout period is for a few weeks and the circulation report would only show one. It is my understanding that usage statistics is not available through the provider because of the way we have the system setup for the pilot.

However, that pilot is now/has now come to an end and libraries may opt to continue but paying for their own payment plans and therefor obtain more statistics on usage.

Are people putting these counts as an answer for both questions? Circulation of electronic materials (like checked out ereaders) and also wireless sessions?

Scott Dermont (IA)

I would count this as an equipment checkout. Like a laptop or tablet checked out for home use. Once the device leaves the building, it becomes circulation rather than Internet use. I think the wireless sessions works the same way. We are looking for the use of the library's wireless service "in-house." Once they take the router home, I think it becomes a different kind of count - circulation.

I think it is useful information to know that a library is checking these devices out. But I don't think it is useful to know how much the patron uses it at home. I think this is comparable to checking out physical materials such as a DVD. We want to know how many times it checks out, not how many times the patron uses it once they get home.

Michael Golrick (LA)

Hi-

I was waiting to chime in as I catch up from the holidays and having been at ALA Midwinter. I had a nagging feeling as I saw the initial responses, but had not been able to figure out why. I think that Scott put into words what I was trying to figure out.

Counting the checking out of the device is the service we provide. Just like with books, DVDs, anything else, we don't count how many or how it is used. (Parents and grandparents can identify with reading a book over and over again.)

If I library can, and wants to count, the hotspot/data use, that is fine. I don't think that it is comparable enough to be added to the wireless use we seek to count.

Hope the year has begun well for all.

Terry Blauvelt (MO)

The PLS doesn't collect equipment checkouts.

Scott Dermont (IA)

I would normally count that in as part of element 550. We don't break things down by category on the PLS. As that definition is pretty broad, we break it out into a few big categories on my state survey. I have an "other" category that I would use to count equipment. But you are right Terry, that it all gets totaled up into 550.

Sam Shaw (NE)

And I wonder if those would be captured under the new proposal for “physical item circulation”. The only issue I have with “if you want to count them, OK, if not, OK also” is that this is a national element. Therefore, you might have state A that captures and reports the use and state B that doesn’t, and thus comparing the two might be difficult, if not pointless. And (that’s 2 sentences started with And in case you are counting) then we have to ask why are we capturing it at all.

Michael Golrick (LA)

Hi-

Not explicitly. For my state it is included in 550, I think I include it in “Other” for when I ask libraries to report more detail to me.

Scott Dermont (IA)

The definition for total circulation is very short and very broad. Pretty much anything checked out for use outside the library is counted. This doesn’t just cover equipment. I have libraries that also checkout cake pans and art prints, amongst other things. As far as I know, we’ve always counted that stuff as circulation. I agree that all states should be consistent with this. To be honest though, I’m not sure why other states wouldn’t count it. I think for physical items it doesn’t make a difference if it is a book, CD, Blu-Ray, or screwdriver. If the library checks it out for use outside the library, it is circulation.

Terry Blauvelt (MO)

We probably need to either add a category or amend the definition of 550. Missouri collects four categories of electronic equipment checkouts, but we don’t consider them a library material to include in 550. If each state is collecting and counting these differently, the numbers become inaccurate and thereby unusable with any confidence level. The way I am seeing the definition of 550 interpreted, I should be including the circulation of fishing poles and seeds in addition to the aforementioned equipment.

Sam Shaw (NE)

Thanks, Scott. We also have always counted the circulations of cake pans, tools, puppets, tablet computers, light sabers, etc. We lump those into 550.

I should clarify – I meant to point out differences in counting or not counting WiFi uses from the circulated mobile hot spots. I agree with your original post on not counting (uses that is).

Scott Dermont (IA)

OK, sorry Sam, I think I misunderstood your original post. I'd hate to discourage you from agreeing with me! ☹

Scott Dermont (IA)

I'd agree with the fishing poles. Seeds on the other hand... What are you actually counting? Usually the idea of circulation is that the item is returned. Maybe the person checking out seeds brings in new ones, but maybe not. I don't think I'd count it. I normally don't count free giveaways of items as circ.

Telephone Calls

January 15, 2016

Question

Terry Blauvelt (MO)

Hello all,

I have a library that would like me to add a question or two at the state level concerning telephone calls as a type of reference transaction, but also as a type of visit (think like virtual visit). I have some concerns about content parameters, duplication with reference transactions, and burden of reporting. Does anyone collect any data on phone calls?

Happy Friday to a three day weekend!

SDC Comments

Scott Dermont (IA)

I would count phone calls as reference questions. Or not, depending on the content. If I was going to add a question like this to my state survey, I would to know what it was going to be used for. We already count it in the reference transactions count. Do we need to count it again as something else as well. I would tend to say no to that.

Katrice Stewart (FL)

Robert:

Hi, Terry.

I agree with Scott on this one. In Florida, we do NOT specifically pull out telephone calls but do promote adding to the tally for reference questions, if and when appropriate.

Terry Blauvelt (MO)

To clarify, we already count reference related questions via telephone in the reference transactions tally. The library is wanting to separate out the phone calls as a separate type of reference transaction.

Jamie McCanless (WI)

I agree that if the question is a reference transaction, receiving it by phone doesn't exclude it from the count. It's still a use of library staff service. On the other hand, counting it as a virtual visit strikes me as quite a stretch. In my head, virtual visits don't involve direct interaction with staff.

Scott Dermont (IA)

I would want to know how that data would be used at the state level. I guess if you wanted to know how reference was being delivered you could break it out into categories. I would probably break out more than just phone service in that case. But are you really using it, or is it just nice to know? I'd need a really good case before I make the reference question even more complicated to report. I find it hard enough to count as it is.

Robbie DeBuff (NV)

Hey all!

I would think that counting the phone calls, if reference in nature, as a reference call would be more in line with what we've done for year, years, and years. We need to remember that we never even thought of the "virtual visit" until the internet, why would necessarily we go back and rethink how we count phone calls?

Just my thoughts... :-/

Clarification/guidance needed – Paid Staff, Public Access Computers, and Revenue

January 25, 2016

Question

Megan Schulz (KS)

I am currently in my second round of collecting surveys since taking over this position and have received a few questions that I would like to see what the consensus is as far as the answers.

- A technology person at a library does not hold the title of which involves “librarian” but they do have an MLS. This person does answer patron technology questions and also staff questions. Where should they be listed within the paid staff area? The library wants to be able to show that they have this extra MLS on staff, even though the position does not require it. My first thought was to put in “Other Paid Employees” and not within the ALA/MLS question. But I can see both sides. Also, the questions they answer for patrons should be counted within the reference transactions but not the tech questions they help co-workers with, yes or no?
- Computer lab laptops which are only available to patrons during classes, do these get counted within the total for public access computers available? I would think not since not always available to the patrons and only during scheduled classes. I believe the classes and attendance would be counted with the programming sessions and not usage of public access computers. Right?
- Some of our libraries receive the Summer Food Service program grant which is administered in our state by the Dept of Ed but is really money from the USDA. Here is the program- <http://www.fns.usda.gov/sfsp/summer-food-service-program-sfsp> Does this money get listed in Federal Government Revenue? Or within Other Revenue.

Thanks in advance,

SDC Comments

Jamie McCanless (WI)

The PLS doesn’t collect the number of staff who have an MLS but are not librarians. That staff would be included in 252 All Other Paid Staff. That said, we rarely question whether a Wisconsin public library position is technically a librarian except in very obvious cases; e.g., pages are not librarians.

The questions that the technology person answers internally (asked by library staff, not the general public) would not be included in 502 Reference Transactions.

Because the definition of 650 Number of Internet Computers Used by General Public reads “used by the general public in the library” I would reluctantly exclude class-only computer lab laptops from 650. As a result, I would include the computer classes and attendance in 600 Total Number of Library Programs and 603 Total Attendance of Library Programs but not in 651 Number of Uses of Public Internet Computers per Year. If the class(es) were primarily for children or young adults, the numbers would be included in the corresponding program data elements.

SLAs administer the IMLS Grants to States program and pass through grant funds to libraries, which are reported as federal revenue. In the same way, I would list the Summer Food Service funds passed through to libraries from the USDA by the state’s Department of Education as federal revenue.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov.

Megan Schulz (KS)

Thanks!

Your explanation helped me to see that the way we have been asking this question “forever” and before my time, changes the order around and makes it not really possible to show an MLS on staff without a librarian title. We ask for librarian hours and then say something like “of those listed above, how many have an MLS”. I will change this in future years as I hadn’t noticed the need for it to be a different way before now.

Agree with all of the rest and appreciate everyone else helping also!

Hoopla stats

February 1, 2016

Question

Megan Schulz (KS)

My brain is already fried (and only 9am on Monday) and wondered if someone could help.

Hoopla is a database, right? That means, the collection size count does not get reported but the expenditure would be counted and also counted towards the local database number. Where would the circulation figures be shown, if at all?

I was just given these below counts. You can ignore the numbering as that is state specific but they point to the collection size counts and not circulations.

9.2a (Other) - Audio (Music and Audiobooks) - 296909

9.3a (Other) - Video (Movie and TV) - 22866

9.4 (Other) - Ebooks (Ebooks and Comics) - 8665

Thanks in advance,

SDC Comments

Scott Dermont (IA)

I would count phone calls as reference questions. Or not, depending on the content. If I was going to add a question like this to my state survey, I would to know what it was going to be used for. We already count it in the reference transactions count. Do we need to count it again as something else as well. I would tend to say no to that.

Michael Golrick (LA)

Hi-

If it is a database, then there are not any circulation stats, there are database use stats. (And we have been collecting those in Louisiana for years.)

And thanks for the reminder that I need to fill in the statewide stats on that for my libraries....

Linda Hofschire (CO)

There was a discussion about this in December that I've pasted in below – indicating that Hoopla can be counted in the collection.

Katrice Stewart (FL)

Hi Thomas!

I'd say that if you can implement the new elements and folks can parse apart, then let 'em show it ☺

Thomas Ivie (WY)

I saw on the wiki a discussion from last year regarding Hoopla. I am as confused as ever on this one (database vs collection). Can anyone clarify for me? We have ask for "locally licensed electronic books." I want to say that if they can differentiate between movies, music, and e-books, then why not show count them. But the other side of my brain wonders if I should leave it alone because "database." Help

Megan Schulz (KS)

I do remember a conversation in December about this but don't believe there was a general consensus as to the answer. Even the responses to my query are not consistent.

The problem I have currently is, my survey runs Jan 1-Feb 10, 2016 for calendar year 2015 stats for all 331 public libraries. On Friday one of our 7 Regional Library Systems (not part of the State Library) sent out stats for Hoopla to their member libraries. Already 40% of libraries in the state have completed the survey so am trying to determine how to handle. So far only 1 libraries asked me to unlock but when more start flooding in...

Even on my instructions I give Hoopla as an example of a database and not an ebook collection. Maybe I just unlock for libraries who request and let the chips fall where they may.

Sam Shaw (NE)

Hi Megan:

Might confuse you even more, but there was a discussion before the one Linda mentioned. See this link:

<http://plsc.pbworks.com/w/page/96601431/Changed%20data%20element%20definitions%20%28FY2015%29>

About halfway down is where Hoopla enters the picture. Might want to CTRL-F IT and go from there.

Scott Dermont (IA)

Yes, I count Hoopla as a database, and do not count its circulation or collection size.

Jamie Mott (IL)

I have already had some VERY angry libraries starting to complain about not being able to count Hoopla as more than one database. I have been telling them all that they can only enter Hoopla as a database and not count circulation, etc. They are angry July 21, 2008 because they are spending quite a bit on it and feel like it is not accurately representing the service they provide their patrons. I think the "Use of electronic collections" data element may help next year, but I'm just bracing myself for angry librarians from now through Sept. 1. At least your survey period is short.

Scott Dermont (IA)

I had similar concerns last year, especially after the data element for database use didn't pass. So, I created a state question that covered database use. I think it went pretty well and it got them thinking about counting it. You may find that fewer libraries are counting it than you think. That was my experience. I ended up getting a lot more questions about how to count it then I did complaints about not counting it in previous years.

Roku Sticks

February 5, 2016

Question

Amy Heebner (NY)

I have some libraries that circulate Roku Streaming Sticks that provide access to streaming videos. Would they count the individual videos as video-downloadable units, and then count the circulation of the stick as physical (not electronic) circulation?

SDC Comments

Jamie Mott (IL)

I would count the Roku stick as physical circulation. As for how to count the streaming media, I guess it depends on how that media is available. Is the stick providing access to a set of videos purchased by the library? If so, those videos should be counted as video-downloadables. If it is just to access content freely available or available through a subscription service, I would think that it wouldn't count (akin to the Hoopla database situation).

Michael Bodily (ID)

I second counting the Roku as a physical circ. The "streaming videos" that it provides access to are all Netflix and Hulu services that I'm assuming the library isn't paying for subscriptions for. As far as where to count the Roku in the collection, I don't know where that would go. Question 454 maybe, but that's up to interpretation. To me, it's similar to counting laptops or e-readers that the libraries check out to their patrons.

Scott Dermont (IA)

I would probably count it as one physical circulation. IT doesn't contain any data, just provides access to Internet services. I wouldn't count the downloadable stuff unless it actually gets used. So checking out a Roku that provides access to 100 videos is not 101 circulations. Besides, I doubt they could track usage on the Roku. If they are trying to count downloadable stuff, I would want more information before allowing it.

Amy Heebner (NY)

I found out that the library purchased the videos but they do not have a circulation period, so I think that means they can count video downloadables under collections and the circulation of the stick.

IndieFlix

February 10, 2016

Question

Thomas Ivie (WY)

Does anyone have experience with any of your libraries using IndieFlix? I'm not familiar with it and I have a library that included it in their e-circ. My first inclination is "no" but I thought I would throw it to our group since I didn't see it in the PLSC.

SDC Comments

Patrick Bodily (ID)

I responded to the IndieFlix question the same way it sounds like you are thinking about doing. To me it fits the definition of an "Electronic Collection" so, currently, we don't track that usage/circulation. We'll see how the ballot turns out 😊

Online Training Videos

February 25, 2016

Question

Jamie Mott (IL)

I just had a library fill out our survey and state that their video downloadable collection grew by 4,000+ titles due to a subscription to Lynda.com (online training tutorial videos). At first glance, I would say this looks like a database, but has anyone else dealt with Lynda.com?

SDC Comments

Scott Dermont (IA)

I would agree. Database.

Michael Golrick (LA)

I agree with Scott. They keep trying to sell me their product for my library (my budget for all purchases last FY = \$300; this year it dropped to \$0).

Folks can watch the videos online, nothing is downloaded. I just used one of my multiple library cards and logged in to one of the libraries to look at it. It is very much just a database.

Definition of Library Staff for Reference Counts

March 17, 2016

Question

Lisa Dale (CA)

Hello fellow SDC's,

I am the new State Data Coordinator for California and have been asked if Reference assistance provided by volunteers can/should be counted. In particular, we have a number of libraries that use volunteers to provide assistance with the use of technology.

I'd appreciate your feedback.

SDC Comments

Scott Dermont (IA)

The definition says "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..." I believe that the intent here was that using the term "library staff" means paid library staff. Volunteers are not counted as staff for survey purposes otherwise, so I would count them here either.

See also: [Help on stats question: how to track reference questions answered by trained volunteers](#)

Percentage of collection expenditures spent on electronic materials/digital units

March 29, 2016

Question

Kristen Stehel (UT)

Hi all,

Based on your most current state library data, what percentage of collection expenditures do your libraries spend on electronic materials/digital units?

In Utah, 2015 data shows 17% of collection expenditures spent on electronic materials/digital units.

- 17% on e-materials/ digital units
- 23% on other materials
- 60% on print materials

I would really appreciate anyone that could contribute to support my case study.

Thanks!

SDC Comments

Patrick Bodily (ID)

Kristen,

Based on our 2015 data, Idaho spent:

66.5% on Print materials

22% on Electronic Materials

11.5% on other Materials

Hope that helps,

Kristen Stehel (UT)

Here is a more accurate count:

- 17.2% on e-materials/ digital units
 - 23.5% on other materials
 - 60.3% on print materials
-

Stacey Malek (TX)

The most recent year I have available for Texas is 2014.

60% Print
 23% Electronic
 17% Other Materials

Nelson Worley VA)

Stats for Virginia

	FY 2013	FY 2014	FY 2015
Books	57%	55%	54%
E-Materials	20%	22%	24%
All Others	23%	23%	22%

Justin Maga (AS)

American Samoa Stats

FY13	FY14	
48%	46%	Books
38%	37%	E-Materials
14%	17%	Others
FY15 Not available		

Kristen Stehel (UT)

Thanks to all that contributed. Here are the average numbers showing how Collection Expenditures are divided:

60% spent on Print Collections
 20% on Other Materials
 20% on E-materials

Bob Wetherall (DE)

When trying to compare these averages against Delaware averages, we were wondering if the national averages included state expenditures for eMedia. Delaware is somewhat different in that all eBooks and

most databases are purchased by the state and made available to all residents who have a public library card. If the averages don't include state expenditures, then it's hard to compare them to our situation.

I would appreciate it if those who contributed to the national averages could let me know if you are including state expenditures.

Cathy Van Hoy (OK)

Oklahoma does not include state expenditures for databases and ebooks. The amount spent is what the library spends only.

Patrick Bodily (ID)

Idaho is the same as Oklahoma. We only included what the library spent.

Jay Bank (KY)

KY too

Thomas Ivie (WY)

Ditto

Jamie Mott (IL)

Same for Illinois.

Jamie McCanless (WI)

Robert,

Wisconsin libraries also report only their own expenditures for electronic content. The libraries are not paying for the actual licenses, though. They contribute an amount toward the contract for a shared collection available throughout the state.

Bob Wetherall (DE)

Thank you.

Amy Heebner NY)

NY does not include state expenditures, or regional system expenditures.

Joy Garretson (MS)

We do not include state expenditures on databases and e-materials.

Core public library services

March 30, 2016

Question

Jaime Ball (AZ)

Hi, all,

I have a general background question: Do you know of a federal definition for “core public library services”? I see the FSCS definition of a public library, but it doesn’t describe essential or fundamental library services. I think borrowing privileges and computer use are two such services, but what about programs?

Thanks for your insights.

SDC Comments

Stacey Malek (TX)

Hi Jaime,

In Texas, we accredit public libraries and there is a public library service criterion in our agency’s administrative code. It’s not really a definition, but does include what libraries must provide free of charge to residents living within the political subdivisions that provide revenue to the library, mostly cities and counties.

(a) Library services for the general public must be provided without charge or deposit to all persons residing in the local political subdivisions which provide monetary support to the library. These library services include the dissemination of materials or information by the library to the general public during the hours of operations of all library facilities. In this context, library services include the circulation of any type of materials, reference services, use of computers to access information sources, databases, or other similar services, and admissions to the facility or any programs sponsored or conducted by the library.

(b) The following charges are permitted at the discretion of the library's governing authority: reserving library materials; use of facilities; replacement of lost borrower cards; fines for overdue, lost, or damaged materials in accordance with local library policies; postage; in-depth reference services on a contractual basis; photocopying; printing; telefacsimile services; library parking; service to nonresidents; sale of publications; rental and deposits on equipment; and charges for the use of materials and machine-readable data bases not owned by the library for which the vendor or supplier has charged a borrowing fee.

(c) Fees may not be charged for library services on the library premises by individuals or organizations other than the library unless the charges are permitted by subsection (b) of this section.

I hope this helps.

Kathy Sheppard (SC)

Jaime, I don't think there's a federal statement of public library core services.

IMLS' intro to the annual survey report ("Public Libraries in the United States Survey") has a lot to say about services. Actually just the list of topics covered in the annual survey could be considered a sort of de facto set of core services, or expectations for what libraries are supposed to do:

- Visitation (providing a facility to house staff and collections, as stated in the definition of a library)
- Circulation of Materials
- Program Attendance (indicating that it's normal and maybe expected that libraries offer programs)
- Public Access Computer Usage
- Reference Transactions

Our consultant Scott Murphy poked around and found the list of **Public Library Service Responses** defined by June Garcia and Sandra Nelson for PLA, in the [attached publication](#). Take a look at page 3 to see the list of 18 service areas. The titles for these service areas are a bit whimsical but it's a comprehensive list. But, this is nine years old and things change.

I think it kind of depends on what you need to do with this set of core services. You could use them in your statewide library standards as a kind of checklist for libraries or a "library report card," something we have considered doing.

It's an interesting question!

Jamie McCanless (WI)

Jaime,

I don't know of a federal definition, either. Wisconsin state statutes are less specific than Texas, only referring to an Attorney General opinion:

A library can charge user fees for any services that fall outside of a library's inherent information-providing functions; core "library services" must be provided free of charge to the inhabitants of the municipality.

Reporting federal and state funds: The most tedious affair

April 6, 2016

Question

Joy Garretson (MS)

Hi everyone,

After a couple of years of struggling with this mathematical situation, I thought I'd put it to you! In Mississippi, we funnel federal funds to our libraries through LSTA grants, and then we give them state funds via personnel incentive grants, health insurance, and life insurance. We have all of the official payment information for both federal and state payments, but we ask each library system to report their numbers to us on their annual surveys. Last year, the numbers looked wonky to me, and some research showed me that many library systems were incorrectly reporting these numbers—sometimes by a few dollars, and sometimes by many thousands of dollars. For instance, the system I'm currently looking at didn't include roughly \$100,000 in state funds that they received from us last year. I think they didn't include that money because the two payments totaling that amount were supposed to go towards their previous fiscal year expenses, but they didn't file for the payments in time, etc., etc., etc.

Having gone through the tedious process of checking their numbers, finding differences, checking our numbers, and then emailing the library directors about these issues, I wonder if there might not be an easier way for me to go about this, such as making State aid (and maybe LSTA funds, though they're better at reporting those correctly) a field that I populate for them on the report, using official records. What are your thoughts? What do you do in your states?

Thanks!

SDC Comments

Michael Golrick (LA)

Hi-

I always prefill and lock "State Aid." It is so much more accurate. Of course, this cycle it is Zero.

I try not to let them put in numbers that I know I have access to, and more accurately. That includes population and use of state databases. And never, never, let them add it up for you!

Megan Schulz (KS)

In Kansas, the only state money which a local library receives is State Aid. I prepopulate that answer and lock it from changes for every library in the state.

We also provide LSTA subgrants to libraries and I prepopulate that answer also within the Federal Government Revenue answer though I did not lock this answer as libraries may have received additional Federal Government Revenue (though unlikely from what I have discovered). Next year I am going to lock this answer that I will prepopulate for all libraries receiving any LSTA subgrant. The ability to edit will need to come through me so I can determine if it really is Federal money. I started prepopulating the Fed Govt Rev question last year, which was my first year, and discovered that libraries were under-reporting this funding and not putting it anywhere on the survey.

I also have worked with our Regional Library Systems to gather the total dollar figure which a library received from them and prepopulated on the libraries behalf. I think I had 4 out of the 7 Regionals able to provide this information. At least 1 Regional thanked me for requesting this of them as it made for a better report for their own usage, though it was work to figure out how to track things differently on their end.

Hope that helps,

Amanda Johnson (NC)

I've been struggling with exactly the same issue! We also give LSTA grants and State Aid payments. We have a separate spot for LSTA grant funds and State Aid on our survey and libraries have always been asked to self-report. I found large discrepancies in both fields this past year but especially with the LSTA funds. Many libraries reported the awarded grant amount not the actual reimbursed amount or reported money that had been received in a different fiscal year. Since we have records for all of these payments, I will be prefilling both fields and locking them this year. I've already notified the libraries of this change and so far there has been no push back.

Jamie Mott (IL)

In Illinois I was told to leave the fields open and unlocked for the library to enter. The reasoning is that the state runs so far behind on issuing payments that even though we may award them a certain amount in FY16, they may only receive partial payment (or no payment) prior to the end of the year. This is especially true with our construction project grants where they get multiple checks released at different benchmarks of the project.

That said, I agree that they have no idea how and where to count things, so if you can do it yourself, do it.

Joy Garretson (MS)

Thanks, y'all! I am glad to hear that entering this data myself isn't a crazy idea. Our grants department typically doesn't run behind on these payments, so I think I'd be safe in entering them and having them be accurate.

Scott Dermont (IA)

“And never, never, let them add it up for you!”

That is the best piece of advice that I have ever heard!

Jamie McCanless (WI)

Joy,

In Wisconsin we only provide state aid to our regional public library systems, so it's simpler to verify state aid payments in those 17 reports. In general, though, where funds go libraries—for example LSTA grant awards and state aid distributed by the regional systems—I track and validate the annual report amounts from first recipient to last expenditure. Necessary but time consuming. It's also unavoidable when I compile the year's Wisconsin Public Library Service Data so that revenue and expenditure amounts are not included multiple times in state and regional system level financial data.

Question about Friends and income

April 11, 2016

Question

Scott Dermont (IA)

Hi All,

I have a question about how to report income from Friends group. If the group gives the money directly, there is no problem. But how would you report it if the library makes the request to the Friends, and the Friends cut the check directly for the item? I think if it was any other group, I would not count it as income as it seems like we would be counting the value of a gift. But I know Friends are handled a bit differently because their sole purpose is supporting the library. What do you think?

Thank you!

SDC Comments

Stacey Malek (TX)

If the Friends purchase on behalf of the library, then neither the expenditure nor the revenue is reported. We do not treat the Friends any differently from any other outside organization. We tell the library that the revenue must hit their budget, in order to be reported.

Hope that helps.

Lisa Dale (CA)

In California, we have asked jurisdictions to report expenditures that Friends pay for directly to support library operations (such as utilities, etc).

Terry Blauvelt (MO)

Missouri treats gifts in kind the same way Texas does.

Jamie McCanless (WI)

If the friends group buys a requested item and gives it to the library, I think that's a gift and the value of it cannot be reported as either income or expenditure. If the friends group cuts a check for an item at the library's request and gives the check to the library, that is a monetary gift/donation that our libraries

would include in All Other Operating Income and as an operating expenditure (or, potentially, a capital expenditure).

Wisconsin public libraries can report municipal expenditures made “on behalf of” the library, such as utility payments or staff benefits, but I would hesitate to stretch that to friends groups.

Challenged Materials

April 11, 2016

Question

Linda Hofschire (CO)

Hello,
For years Colorado has tracked challenges to materials as part of its PLS data collection. Does anyone else collect this information?
Thanks,

SDC Comments

Lisa Dale (CA)

No.

Stacey Malek (TX)

Texas does not.

Jamie McCanless (WI)

Linda,

Wisconsin does not, but that's interesting. What do you collect? Number of challenges? Titles challenged?

Linda Hofschire (CO)

Hi Jamie,
We collect number of challenges, format (computer, video, book, etc.), intended audience, reason for challenge, and how the challenge was resolved. Here is an infographic summarizing our 2014 results:
<http://www.lrs.org/fast-facts-reports/challenged-materials-in-colorado-public-libraries-2014/>

I received an inquiry from ALA's Office for Intellectual Freedom regarding whether other states collect this information.

Thanks!

Whitney Payne (GA)

Georgia does not.

Amy Heebner (NY)

New York does not collect that information.

Robbie DeBuff (NV)

Nevada does not.

Joe Manion (MN)

Minnesota does not. But, I will propose to our public libraries as an added element for 2016.

Lisa Hickle (OH)

Ohio does not.

Susan Hoskins (WV)

WV does not.

Nelson Worley (VA)

Virginia does not.

Patrick Bodily (ID)

Idaho doesn't either.

Carole Suzui (HI)

Hawaii does not.

Lauren Plews (RI)

Rhode Island does not.

Jenny Melvin (ME)

Maine does not collect this data.

Megan Schulz (KS)

Kansas does not.

Robert Keith (NJ)

New Jersey does not track this.

Jaime Ball (AZ)

Arizona does not.

Joy Garretson (MS)

Mississippi doesn't report this on the PLS, but we have started counting and keeping track of them (as much as possible) here: <http://mlc.lib.ms.us/ms-libraries/mcbi/>. You'll notice that we haven't listed any for 2016, but we're hoping to track this closely and get our libraries more accustomed to reporting challenges.

Jeremiah Kellogg (VT)

The Vermont Dept of Libraries does not track this, but the Vermont Library Association has just implemented a form that Vermont Libraries can fill out to report challenged materials: <http://www.vermontlibraries.org/report/>.

Cathy Van Hoy (OK)

The Oklahoma Library Association has a database of challenged forms but it isn't open to the public. Here's the form.

Intellectual Freedom Committee
<https://oklibs.site-ym.com/?page=IFC>

Thomas Ivie (WY)

Wyoming does not track

Jamie Mott (IL)

Illinois does not track.

Linda Hofschire (CO)

Hi all,

Thanks very much for answering my question about challenges. Jamie LaRue, who is the new Office for Intellectual Freedom director, has requested that any future challenges data be sent directly to him at jarue@ala.org. Jay – I passed on your spreadsheet to him.

Reference questions vs. one-on-one tutorials

April 20, 2016

Question

Jamie Mott (IL)

I had a question come through about reference vs. one-on-one tutorials:

“We have always counted one-on-one tutorials as Reference questions because we are teaching them something, as opposed to directional questions [...] Generally in these sessions, the staff is helping someone use either our information resources or equipment or software. If they are teaching them to use Word, it is because they are using our computer. If we are teaching them to use their Kindle, it is because they want to download our e-books. Or we may be teaching them to find the information they need on one of our databases. Shouldn't these all count as Reference? We do distinguish directional questions and do not count them as Reference questions.”

Looking at the definition for the data element, I'm not quite sure how I want to respond. The definition does allow for computer instruction to count. One-on-one tutorials are excluded from programs, but I can think of instances which I would not consider reference transactions.

How are other states differentiating for reference vs. one-on-one tutorials?

SDC Comments

Amy Heebner (NY)

I had a similar question and I explained that a one-on-one tutorial is more like a program (but shouldn't be counted as a program!). In most cases a one-on-one tutorial would be scheduled via an appointment. If it is not scheduled then I see it as a reference question.

Scott Dermont (IA)

I believe that the original intent was for unscheduled one-on-one sessions would be counted as reference, where scheduled events would not.

New data element--successful retrieval of electronic information

April 27, 2016

Question

Amy Heebner (NY)

I wanted to verify that we are including use of statewide databases in the new data element, successful retrieval of electronic information. For some regions in NY this will be possible while for others it will only be available at the regional level, not at the individual library level. I'm not sure what to do for the areas that cannot provide it at the library level (and I'm sure they will ask me!).

SDC Comments

Amy Heebner (NY)

I had a similar question and I explained that a one-on-one tutorial is more like a program (but shouldn't be counted as a program!). In most cases a one-on-one tutorial would be scheduled via an appointment. If it is not scheduled then I see it as a reference question.

Scott Dermont (IA)

Normally I would say that if they can't get the information, they shouldn't report it. I expect the first couple of years of data to be of limited value. But it is a good way for them to start thinking about how to gather the data.

Jamie McCanless (WI)

So, Amy, I think the answer is yes, uses of statewide databases are included in the new Successful Retrieval of Electronic Information.

Colleen Hamer (MT)

Is it worth mentioning, whenever data is not available it should be represented as -1 (Not -0- zero) correct?

Excerpt from PLS Web Portal User's Guide:

-1 "-1" means that the appropriate figure is unavailable.

Amy Heebner (NY)

If they have data for all of their other databases but not the statewide ones should they enter that it isn't available, rather than enter partial data?

Jamie McCanless (WI)

Amy and Colleen,

That's what I would do; i.e., if the library's number of uses is known to be incomplete, enter -1.

If you have any questions, please feel free to contact me at (608) 266-3939 or jamie.mccanless@dpi.wi.gov.

Amy Heebner (NY)

If we could get regional system usage could we/should we split it up among the individual libraries in that system?

Colleen Hamer (MT)

I'd call that a good number.

Katrice Stewart (FL)

I would indeed, Amy, divide it up in some appropriate manner – so based on something they all have in common.

Agreed, Colleen 😊

Jamie McCanless (WI)

Amy,

We have regional library systems in Wisconsin, too, but if I can only get Successful Retrieval of Electronic Information at our system level, I won't be dividing the data among member libraries. It would have no accuracy.

Katrice Stewart (FL)

So, Jamie, you'll be reporting -1s in many places?

Jamie McCanless (WI)

For FY2016, it's possible but too soon to tell.

Jamie Mott (IL)

I agree with Jamie. If the software can't give a report of how many times it was accessed by an individual library, separating it by some other means would not be giving a real number. I know that some of the e-resource services that some of our library consortia use have this capability, so the libraries report on the total number of items available to them through the consortium, but only their library's circulation numbers.

I actually think this is a problem all around for electronic items. It really doesn't paint an accurate picture to be double counting all these services. I know every state is set up differently, but there has to be a better way to count what a library is actually purchasing on its own and then what the systems/consortia/state are providing.

Sam Shaw (NE)

It seems as though there might be some inconsistencies here that should be discussed. The original post suggests that databases, er, I mean electronic collections that are paid for by a consortium (e.g. either by a regional library system or – in our case, by the state) should have their use reported in a divided fashion (how, I don't know). I think this would be OK, if your reports actually allowed for those to be parsed out that way so that you knew what the actual use was for each individual library. But we know from experience that in these consortia-subscribed to databases that that really isn't possible. What we do have is the use figure for overall state use, or the total, so we could report it for the entire state, but not each individual library. And so the individual libraries would report only the use for databases that they subscribe to locally, and as Jamie suggests, a -1 for the databases reported under 457, or under 456 as "other cooperative agreements."

I can't think of a method where you could apportion or parse out that large use number for statewide databases in a way that would accurately reflect the actual use of the individual library. And in some cases/states that use geo-location services (Michigan? Kansas?), it's completely impossible.

I worry about these inconsistencies. I know there was some discussion about a library only reporting use if it was a database that they paid for – that would certainly make things a bit more uniform. But I don't see anything to that effect in the definition that was passed.

Michael Golrick (LA)

Good morning-

This is data which Louisiana has been collecting for years. Every vendor of a state-paid database can give us relatively decent numbers of library use by individual library. Now, admittedly there are only 68 library systems in Louisiana – and most of them are parish (county) systems. But they collect info by IP address, so it is possible. The question is are they willing to do it. I We have used the same vendor for our state report data collection (I am in the middle of it) since 2004. We have data on library-by-library use of state-paid databases from at least that time. (I am too lazy – at the moment – to go upstairs and dig through the paper files to see when we started.)

It is a matter of our (the state, the customer, the one who pays the bills) asking for the data in a format we can use. I am telling you that the vendors can do it, because they have been doing it of Louisiana for more than a decade.

Tell the vendor that you *must have* that data.

Hope you all have a great weekend ... mine starts in a mere 9 hours ...

Michael Golrick (LA)

Hi-

Let me just add a note since this arrived while I was busily typing my earlier note: we have used geo-location for at least a year, and still have pretty reliable data.

I contend that all we need to do is ask. If we (the state agency) are paying the bill, we get to determine what meaningful data is, and should expect it!!

Megan Schulz (KS)

Yes, in Kansas we have statewide databases which the individual libraries do not contribute to the cost. Kansas residents have access to the databases by clicking a link on our website, if their IP shows as a Kansas address, they are not asked for login information. If they are on the border, out of state on vacation, etc. it asks for login information. We have a Kansas Library eCard which any type of library in the state can issue to any KS resident.

That means, we do not have individual library data for “their” patrons. We have done a lot to eliminate barriers to the patrons like login requirements. It is my understanding, at this time, that if we wanted individual library information each library would need to set up their own link on their own website. That would be better for libraries (I guess at least because then they could answer this question easier) but not better for the patron.

We are still uncertain how we are going to handle this with the new questions. I will speak to our Statewide Services Division again about some of what Michael has mentioned about vendors having this information. Though, I am not certain if we had the IP addresses for everyone who used the databases, how are we to know what library that is attributed to? We use a service called Quova for our IP authentication so obviously they know what is Kansas but an individual library? We have 331 public libraries in KS and very few with branches or district libraries.

Amy Heebner (NY)

I was just thinking of splitting it up evenly so that the stats would be counted (although that is not ideal). My concern is that those who don't have individual library data for the statewide databases will have to report no data even if they have the data for their other electronic resources.

Regarding Michael's messages, we are using geolocation and the geolinks include a code for the individual library, but in some regional systems the system manages the databases so they use their system code. I will inquire of the vendors about stats for that situation but I'm not sure that I want to get into collecting/recording the stats for the individual libraries (although I'd be happy to share a statewide number).

Katrice Stewart (FL)

I've had some extensive talks with folks from Gale (I know they're not the only game in town...) but they're working to lead a charge to make this data available to us the way we need it. I've provided them with the newly adopted definitions (immediately after the final voting had concluded).

In most cases, even if a person doesn't actually have to login and are just authenticated by IP address, vendors CAN associate IP addresses with the library in their area. Gale does that for the statewide electronic resources we have and has been doing so all along. So, even though we've are just now asking for this information from the field, the technical infrastructure is there – we, as SDCs and maybe even the local libraries, may not know it is there.

Gale is coming here next week to talk more about this very issue. I'll make it a point to talk with them about this conversation on the national front. They told me previously that they're leading a cohort of industry folks to synthesize electronic report. I'll share to this group what I learn. 😊

Joe Hamlin (MI)

Do we have a list of the states that provide statewide library databases that all residents of the state can access to regardless of their local public library? In Michigan, residents or anyone who is currently within our borders has access to the Michigan Electronic Resources (MeL) and do not have to access these through any participation with a public library. It seems that to get an accurate count of the use of materials provided in this way would be to record it in the State Characteristics section on the PLS or add it to the SLAA.

Megan Schulz (KS)

Kansas is the same as Michigan in this respect.

We have the mindset that we are serving Kansas residents, not Kansas local/school/etc. library patrons.

Patrick Bodily (ID)

Ditto for Idaho.

Katrice Stewart (KS)

I don't think anyone has the mindset that local residents are the ones served rather than the state. My point is that even though patrons are not logging in per se, there is still an authentication process happening. Otherwise how would your e-resources portal know that a Kansas person can use the Kansas resources. So, somehow there is an association of a location with an IP address.

Florida is just the same – we have statewide e-resources that can be accessed by anyone with the borders of Florida. When a person accesses the site, there is an authentication process that happens in the background. If they are close to the state's border, they may have to use their library card # if their IP addresses is not "registered" in the IP address ranges Gale has set up. There is no reason the vendor can't group those IP addresses regionally or by whatever assignment to be able to allocate or associate them with the library that is closest to them.

Katrice Stewart (KS)

I saw that after I sent this that Patrick echoed Megan and Joseph. This just goes to support my suggestions even more. All of our states function close to the same. Making this a bit more allocable may take some work on your e-resources person and the vendor but it CAN be done.

Terry Blauvelt (MO)

If I am not mistaken, there is a geocache program that collaborates with the IP address that is able to pinpoint locations to within a few inches. This is attached to a shape file that identifies the borders of a given state. In the case of Kansas and Michigan, once authenticated any person within the borders of said state has access. The citizens/residents/visitors have immediate access without the consideration of any library. The system is designed to serve the residents directly.

Megan Schulz (KS)

Right, we got through a vendor called Quova to do the geo-location authentication process for us. "They" know what IP address is associated with Kansas.

However, I am not aware, unless we gave them the library boundaries (which in many cases are not just city limits but some townships, etc.), that we have the ability to run a report and learn where in the state that person authenticated at and then attribute that usage to that particular local library.

If we could figure that out, we could prepopulate that answer ourselves to each library. I think what the difference is that our patrons use the same link to start the authentication process. The link can be on our website, their own website, etc. but really is the "state" link.

If a library goes through extra legwork they can get "their own" link for their own website which will provide statistics but also adds an extra hurdle for patrons as usually that means they have to sign in with their local library card.

I may be missing something through and would like to figure it out if so!

Katrice Stewart (FL)

Terry, I'm digging your explanation.

Our process is like yours, Megan. It's really all the same general link. The libraries can add something to the link to customize it making it crystal clear how someone gets to the same place.

When I'm with Gale next week, I'll ask them to explain very specifically how the process works. I'll make a note of Quova to see if Gale has any insight to help us understand and will report back 😊.

Terry Blauvelt (MO)

While not meaning to complicate things for Kansas and Michigan, it would be as simple (not really that simple) as creating GIS shape files for each library for your statewide system. The Missouri Geographic Resource Center (a member of the Missouri Census Data Center) created ours to expedite map production and track populations in library districts.

With this in mind, would the library count the uses if the access is not going through their system (even if they are in the district boundaries)?

Joe Hamlin (MI)

So, Terry's last sentence is the one I'm thinking of here. If I have a Michigan resident who lives just down the street from ABC public library but is not using that public library's resources in any way to access MeL, (and may not even be a registered borrower of ABC) why would I want ABC library to count that use of MeL as a resource that ABC Library provides? Who cares whether or not they live in a library's service area, that library isn't providing that service, the state is.

Counting Downloads vs. Streaming

May 6, 2016

Question

Joy Garretson (MS)

Hey everyone!

I received a question this morning regarding how to count streaming services from Freegal. I want to give the director advice using the new definitions. I am expecting that I will tell her to count streaming sessions under the new item 554 (see below):

The number of full-content units or descriptive records examined, downloaded, or otherwise supplied to user, from online library resources that require user authentication but do not have a circulation period. Examining documents is defined as having the full text of a digital document or electronic resource downloaded or fully displayed. Some electronic services do not require downloading as simply viewing documents is normally sufficient for user needs.

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

My reasoning is that a streaming session needs authentication but doesn't have a circulation period and streaming allows users to "examine" a document (When I listen to the Bangles Greatest Hits album, am I not examining every song for some tidbit of my misguided youth? Yes!). I feel fairly confident in this explanation but wanted to make sure I'm on the same page as everyone before I put together my training materials (which will definitely include references to the Bangles).

Thanks!

SDC Comments

Jamie McCanless (WI)

Hi, Joy

This sounds well-reasoned to me. I'd only suggest mentioning to directors how/why this is not the same as e-video downloadable content. (I anticipate some confusion in Wisconsin about the differences between downloadable content and electronic collections.)

Internet computers used by general public

May 26, 2016

Question

Amanda Johnson (NC)

We have a number of libraries that have mobile laptop labs that they use for library programs and the laptops are available for check-out to use within the library when programs are not going on. Should these laptops be counted in 650: Internet computers used by general public?

In a prior [discussion](#) on the wiki in 2009, computer labs were determined not to be included because they were not fully available to the general public at all times. This would apply to these mobile labs but since the full availability part is not part of the definition I wondered if the thinking on this element has changed?

Thanks!

SDC Comments

Jamie McCanless (WI)

Hi, Amanda

If the mobile lab laptops were not available to the general public when not in use for programs, I would still say don't count.

But, because these laptops are available to the general public outside of programs I think they can be counted in 650.

Colleen Hamer (MT)

There was a listserv [discussion](#) in the 1/14/2016 range that touched on this... and the idea that these device checkouts are counted in circulation... does/should that exclude them from 'Number of Internet Computers used by General Public'.

E-book Consortium Counts

July 1, 2016

Question

Megan Schulz (KS)

Hopefully, my suggestion is how other states handle this situation as your question has been my question, in the past.

In Kansas, we have a statewide downloadable collection and every library in the state reports (actually I pre-populate part of the answer on their behalf) the same total number available, regardless if they contributed to the cost or not. There is also a separate consortium that some libraries have chosen to join and all of those libraries report the same number also, though not every library contributes the same amount towards the collection.

Basically, I think especially with recent clarifications to the definition, the number reported is “what patrons have access to” and not what the library purchased for the greater good.

Thanks,

SDC Comments

Terry Blauvelt (MO)

I report “what patrons have access to” like Megan. I had to request the data this year (2016 PLS) as OverDrive took the collection report off of my dashboard.

Amy Heebner (NY)

We do the same in NY.

Kristen Stehel (UT)

In Utah, we also do what Terry and Megan do. Each individual library is encouraged to add their own purchased e-materials to the total.

Scott Dermont (IA)

We have a large e-book/downloadable audio consortium in Iowa and I have them count what they have access to. So, if there are 10,000 e-books in the collection, they each count 10,000. I do ask that they also count anything that they pay for above and beyond the consortium.

Megan Schulz (KS)

Also, IMLS (and hopefully no one else) doesn't total up all of the totals for this question for the libraries in your state and use that figure anywhere to "show" the total number of ebooks available in your state. So that helps because otherwise it would be totally incorrect and misleading.

Hope that makes sense.

Jamie Mott (IL)

Illinois allows them to count anything they license, including consortially licensed content.

Regarding e-resources, I am mid survey and after our discussions have told libraries that they can count the items they purchased through Hoopla, but not all of Hoopla. It's almost as much arguing as when we told them not to count it at all. I just had to tell the last one that if she couldn't give numbers per the definition, I'd mark them all as "unknown." I swear by the time they all put in what they want or what they think the definition includes, the numbers mean almost nothing.

End of rant.

Terry Blauvelt (MO)

We count Ebrary, Freading, and Hoopla as one use=one collection. I think I got that from Sam in Nebraska. We break down e-books into three questions.

7.14a Library Held E-Books

7.14b Consortia Held E-Books

7.14c Non-library Held E-books (Ebrary, Freading, and Hoopla)

These are added together for IMLS reporting, but the only real number is 7.14a. The other two are used to meet the definition, but generate unusable numbers.

Vive and Oculus

July 13, 2016

Question

Joy Garretson (MS)

Hey all!

I just got a question from one of my libraries re: how to count his Vive and Oculus usages. I'd never heard of either of these things until today—they're Virtual Reality sets that have streaming content available as part of the user experience. Do any of you have experience counting these, and would you consider counting the streaming videos that users have access to (with the hardware) under our new Electronic Content question?

SDC Comments

Jamie Mott (IL)

The Illinois State Library has an Oculus. It does not circulate and is usually only brought out as part of a tech petting zoo at events. My understanding from trying the Oculus and reading about Vive is that they are basically computer or video game accessories. They cannot function on their own. They also, in and of themselves, do not have content. What they allow users to do is access content through the computer/internet, so they are basically the same as a Kindle, etc. So I would count the Vive or Oculus in physical item circulation numbers. If the library has to purchase access to the game content that goes with them, then I suppose they can count the use of each game in electronic content, but if it is stuff that is freely available online, it wouldn't meet the definition. Either way, I don't think that the content is "streaming" yet. I think they usually have to purchase and/or download each game/program.

That's my take anyway.

Scott Dermont (IA)

I would say to count it like any other piece of hardware. Count it when it checks out. It is basically a controller for virtual reality games. You would still need a PC or gaming console to be able to use it. Treat it like a mouse or keyboard. I don't know if the library is also checking out the software for it. If so, I would count it like any other software use. If they are checking the Oculus out with software, I'd probably count it as a single use. But if they start checking out Oculus games as well, I'd count it like any other kind of game disc check out.