



**Annual Report for Public & Association Libraries 2015  
Outline of Major Changes**

LIBRARY DATA REPORT

**Following are changes to the 2015 Public & Association Library Annual Report – Questions and Instructions**

**NOTES:**

- Please expect a minimal amount of re-numbering due to questions added or re-ordered since the 2014 Annual Report. Not all instances of re-numbering are noted in this outline.
- Please see updates in instructions and rewording in questions and instructions. Not all changes are noted in this outline.
- Instructions intended for more than one question are marked as such.
- Responses to new questions may be estimated for the first year.

**2015 Changes to Part 1: General Library Information**

**1.43 Rewording of Question 1.43 – Public Funding**

“Was all or part of the library's funding subject to a public vote(s) held during Calendar Year 2015? (Please respond even if the vote was unsuccessful). Enter Y for Yes, N for No. If Yes, complete one record for the public vote from each funding source. If no, go to question 1.44.”

NOTE: Repeating group questions ask for more detail including the type of public vote (school district ballot proposition, municipal ballot proposition, budget vote for school district public library, or budget vote for special legislative district public library), most recent prior year approved appropriation and proposed increase in appropriation for calendar year 2015.

**1.44 New Question – Public Funding**

Previous question 1.44 (percentage of local public funding subject to a public vote) has been deleted. It is being replaced with another question about public funding.

“Did the library receive funding from an appropriation which was approved by public vote in a prior year? (Prior to Calendar Year 2015) Enter Y for Yes, N for No. If Yes, complete one record for the vote from each funding source. If No, go to question 1.45”

NOTE: Repeating group questions ask for more detail including the type of public vote (school district ballot proposition, municipal ballot proposition, budget vote for school district public library, or budget vote for special legislative district public library) and the total dollar amount of the appropriation from tax dollars resulting from the last successful vote.

**2015 Changes to Part 2: Library Collection**

**Additional Instructions at the Beginning of Part 2**

This section of the survey (2.1-2.22) 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 (questions 12.6, 12.7 and 12.8). Under this category report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.

**2.13 Change in Instructions – Electronic Books**

“E-books are digital documents (including those digitized by the library), licensed or not, where searchable text is prevalent, and which can be seen in analogy to a printed book (monograph). ~~Include non-serial government documents.~~ E-books are loaned to users on portable devices (e-book readers) or by transmitting the contents to the user’s personal computer for a limited time. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired. Report the number of ~~physical or~~ electronic units, including duplicates, ~~for all outlets~~ at the administrative entity level; do not duplicate unit count for each branch. ~~For smaller libraries, if volume data are not available, the number of titles may be counted.~~ E-books packaged together as a unit (e.g., multiple titles on a single ebook reader) and checked out as a unit are counted as one unit.

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

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

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



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

### 2.14 – 2.15 Change in Instructions – Electronic Materials

~~“Report the number of licensed databases electronic collections. (including locally mounted or remote, full-text or not) for which temporary or permanent access rights and/or the platform have been acquired through payment by the library (directly or through a cooperative agreement within the state or region), or acquired by formal agreement with the State Library.”~~

An electronic collection ~~database~~ is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts, photographs, music, video, etc.) with a common user interface and software for the retrieval and ~~manipulation~~ use of the data. An electronic collection may be organized, curated and electronically shared by the library, or rights may be provided by a third party vendor. An electronic collection may be funded by the library, or provided through cooperative agreement with other libraries, or through the State Library. Do not include electronic collections that are provided by third parties and freely linked to on the web.

Report the number of electronic collection licenses (subscription or one-time purchases). Each licensed electronic collection is counted individually even if access to several licensed electronic collections is supported through the same interface ( e.g. , ProQuest, OCLC FirstSearch).

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 electronic collection is counted individually even if access to several databases electronic collections is supported through the same vendor.~~ Include such services as EBSCO and OCLC FirstSearch, but do not include other electronic serial collections ( e.g. , Project MUSE, OCLC ECO Project). The following are considered electronic collections: Zinio, Freading, Freegal, TumbleBooks, IndieFlix.”

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

### 2.14 Change in Question and Instructions – All Other Materials

"Local Electronic Collections"

“Report the number of electronic collections obtained through the library funds or through other cooperative agreements.”

### 2.15 Change in Question – All Other Materials

“NOVELNY Electronic Collections”

## 2.16 Change in Question – All Other Materials

“Total Electronic Collections (Total questions 2.14 and 2.15)”

## 2.17 Change in Instructions – Audio-Downloadable Units

“These are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced (played back) electronically. Audio – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include Audio – Downloadable Units held locally and remote Audio – Downloadable Units for which permanent or temporary access rights have been acquired.

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

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

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

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

Include audio-downloadable electronic files held locally and remote audio-downloadable electronic files for which permanent or temporary access rights have been acquired by the library or by the library's Public Library System.

Report the number of electronic files acquired as part of the collection even if they are not purchased by the library.

Exclude public domain/uncopyrighted audio-downloadable electronic files that have unlimited access.”

## 2.18 Change in Instructions – Video-Downloadable Units



“These are downloadable electronic files on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver, computer monitor or video-enabled mobile device. Video – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include Video – Downloadable Units held locally and remote Video – Downloadable Units for which permanent or temporary access rights have been acquired.

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

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

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

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

Include video-downloadable electronic files held locally and remote video-downloadable electronic files for which permanent or temporary access rights have been acquired by the library or by the library’s Public Library System.

Report the number of electronic files acquired as part of the collection even if they are not purchased by the library.

Exclude public domain/uncopyrighted video-downloadable electronic files that have unlimited access.”

NOTE: These are federal changes. Text highlighted in yellow is new text; crossed out text has been deleted.

### **2015 Changes to Part 3: Library Programs, Policies, and Services**

#### **New Questions after 3.11 - Accessibility**

“Does the library have assistive technology for the blind and visually impaired?” This will be a Yes/No

dropdown.

“If so, what do you have?” List four choices with check boxes:

- screen reader, such as JAWS or Windoweyes
- refreshable Braille keyboard
- screen magnification software, such as Zoomtext
- electronic scanning and reading software, such as OpenBook
- other

“Does the library have large print books?” This will be a Yes/No dropdown.

**New Questions – One-on-One Programs**

New questions have been added for one-on-one program sessions and one-on-one program attendance under Library Programs, Adult Literacy, Programs for English Speakers of Other Languages and Digital Literacy.

**2015 Changes to Part 4: Library Transactions**

**4.10 Change in Instructions – Circulation of Electronic Materials**

“Electronic Materials are materials that are distributed digitally and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Types of electronic materials include e-books and downloadable electronic video and audio files. Electronic Materials packaged together as a unit and checked out as a unit are counted as one unit. **Include circulation only for items counted under Electronic Books (E-Books), Audio-Downloadable Units and Video-Downloadable Units in the LIBRARY COLLECTION questions 2.13, 2.17 and 2.18. Do not include items not specified under those definitions.**”

Note: This is a federal change. Text highlighted in yellow is new text.

**2015 Changes to Part 10: Officers and Board Members**

**Change in Instructions above 10.6**

“List Officers and Board Members as of February 1, 2016.”

**2015 Changes to Part 12: Operating Fund Disbursements**

**12.23 Change in Instructions - Equipment**

“Record costs of such items as photocopiers, fax machines, computers, printers, scanners, etc. Also include expenses for office equipment repairs, office equipment maintenance contracts and rentals/leases of equipment. **Related technology expenses, such as software and web server services should be included in Other Miscellaneous (12.24).** If any expense exceeds \$10,000 or 5% of the library's budget, whichever is higher, indicate in a state note how the funds were spent.”

Note: Text highlighted in yellow is new text.



**2015 Changes to Part 15: Central Libraries**

**15.1.6 Change – Cash Balance at the Opening of the Current Fiscal Year**

Answer will be pre-filled with data from previous year’s report.

**15.1.7 and 15.2.16 Change in Question Wording – CBA and CLDA Allocation**

“Total Allocation Received from the System”

**15.1.8 and 15.2.17 Change – CBA and CLDA Ending Cash Balances**

Fields will be calculated.

NOTE: This part is for Central Libraries only and will not appear on other libraries’ reports.

1/5/2016