

## State Library of North Carolina

# Public Library Statistical Report Instructions and Data Definitions July 1, 2002 -June 30, 2003

The statistics collected on this form are used to compile the annual Statistics and Directory of North Carolina Public Libraries. Selected data are also reported to the Federal-State Cooperative System for Public Library Data (FSCS) to be used in the creation of a composite report on public libraries in the United States by the National Center for Education Statistics. Definitions ensure comparability of data from different libraries and different states.

Unless otherwise indicated, report data for the year beginning July 1, 2002 and ending June 30, 2003.

Do not mail your statistical report form to the State Library!

### Questions?

Call the State Library at (919) 733-2570 and ask to speak with:

- your library's liaison consultant,
- Timothy Owens, State Data Coordinator, or
- Jeanne Crisp, Chief of Library Development Services.

Thank you for your cooperation!

# LIBRARY PROFILE

## Service Outlets

### 20. Central library

A single outlet library, or the service outlet which is the operational center of a multiple-outlet library. Usually all processing is centralized here and the principal collections are housed here. Synonymous with the main library.

*This data element is reported to FSCS.*

Note: Administrative centers are counted separately, i. e., offices that are separate from the direct service outlets and do not provide direct library services, but may provide staff, materials, and services to other libraries.

### 21. Branch libraries

An auxiliary unit which has all of the following: (1) separate quarters; (2) an organized collection of library materials; (3) paid staff; and (4) regularly scheduled hours for being open to the public. County libraries of a regional system are listed here. Report all branches including those housed in the same building as the regional library.

*This data element is reported to FSCS.*

### 22. Bookmobiles

A traveling branch library which has all of the following: 1) a truck or van that carries an organized collection of library materials; 2) paid staff; and 3) regularly scheduled hours (bookmobile stops) for being open to the public. Count the number of vehicles in use, not the number of stops the vehicle makes.

*This data element is reported to FSCS.*

### 23. Other mobile units

Other vehicles or vans used for library programming (e. g., service to daycare centers) that do not meet the definition of "bookmobile" above.

## Service Hours

24. Total hours open to public per year (all locations)

This is the sum of annual public service hours for all outlets. Include the hours open for public service for the central library, branches, bookmobiles, and books-by-mail only. Do not include hours for deposit collections or other similar service outlets. For each bookmobile, count only the hours during which the bookmobile is open to the public. For administrative entities that offer ONLY books-by-mail service, count the hours that the outlet is staffed for service. Minor variations in scheduled public service hours need not be included; however, extensive hours closed to the public due to natural disasters or other events should be excluded even if the staff is scheduled to work.

*This data element is reported to FSCS.*

Example: The central library and 3 branch libraries are each open 60 hours per week:  $4 \times 60 = 240$  hours per week. Then multiply that number times the number of weeks in a year:  $240 \times 52 = 12,480$ .

## LIBRARY STAFF

Report all personnel figures in FTEs as of June 30, 2003. Include all positions funded in the library's budget whether those positions are filled or not. Include unfilled but budgeted positions. To ensure comparable data, 40 hours per week has been set as the measure of full-time employment (FTE). To compute full-time equivalents of employees in any category, take the number of hours worked per week by all employees in that category and divide it by 40.

Example: Two employees working 38 hours per week would be considered 1.9 FTE. ( $2 \times 38 / 40 = 1.9$ )

25. FTE Librarians with MLS accredited by ALA

Paid librarians with a master's degree from programs of library and information studies accredited by ALA. Graduates whose library schools received accreditation within five years after their graduation should be included in this count ("grandfathered in"). *This data element is reported to FSCS.*

26. FTE Librarians with MLS not accredited by ALA  
Paid librarians with a master's degree from programs of library and information studies not accredited by ALA but having North Carolina Public Librarian Certification.

*This data element is reported to FSCS.*

28. FTE all other paid staff  
Includes all other employees paid from the reporting unit budget including plant operations, security, and maintenance staff.

*This data element is reported to FSCS.*

## **Salaries**

30. Director's salary  
Salary as of July 1, 2003.

**\*\*New Data Element\*\***

31. Salary Range of Library Director Position  
The minimum salary and maximum salary of this position as of July 1, 2003

**\*\*New Data Element\*\***

32. Year of Appointment of Library Director  
Year in which the library director was employed in that position.

33. Minimum MLS librarian salary  
Minimum salary paid to a beginning MLS librarian as of July 1, 2002.

**\*\*New Data Element\*\***

34. Minimum paraprofessional hourly rate - with high school diploma  
Minimum hourly rate paid to a beginning paraprofessional position requiring listed educational level.

**\*\*New Data Element\*\***

35. Minimum paraprofessional hourly rate - with 2 years of college  
Minimum hourly rate paid to a beginning paraprofessional position requiring listed educational level.

**\*\*New Data Element\*\***

36. Minimum paraprofessional hourly rate - with 4 year degree  
Minimum hourly rate paid to a beginning paraprofessional position requiring listed educational level.

# OPERATING INCOME

Report income used for operating expenditures as defined below. Include federal, state, or other grants. Do not include income for capital expenditures, contributions to endowments, income passed through to another agency (e. g., fines), or funds not spent in the previous fiscal year.

## **Local Government Funds**

*The total of these data elements is reported to FSCS.*

### 37. Municipal funds

Includes all tax and non-tax receipts designated by municipalities and available for expenditure by the public library.

### 38. County funds

County funds Includes all tax and non-tax receipts designated by counties and available for expenditure by the public library.

## **State Funds**

*The total of these data elements is reported to FSCS.*

### 40. Aid to Public Libraries grant

Report total amount received in State Aid from the Aid to Public Libraries Fund.

### 41. Other state funding

Grants from the state of North Carolina other than those allocated by the formula from the Aid to Public Libraries Fund. Includes all other funds distributed to public libraries by State government for expenditure by the public libraries, except for federal money distributed by the State.

## **Federal Funds**

*The total of these data elements is reported to FSCS.*

### 43. LSTA funds

Report all LSTA grants distributed by the State Library to the public library for expenditure.

### 44. Other federal funds

Enter federal grants distributed directly to the public library. Include LSCA Title VI Literacy grants, National Endowment for the Humanities (NEH) grants, Higher Education Act (HEA) grants, or other federal funds.

## Other Funds

46. All other funds All operating income other than that reported as local, state and federal funds in lines #34-42. Include only those items that were added to the library's operating budget. Include, for example, monetary gifts and donations received in the current year, interest, library fines, and fees for library services. Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donations.

*This data element is reported to FSCS.*

## Operating Expenditures

### Personnel

48. Salaries and wages The salary and wages for all library staff (including plant operations, security, and maintenance staff). Include salaries and wages before deductions but exclude employee benefits.

*This data element is reported to FSCS.*

49. Employee benefits Benefits outside of salary and wages paid and accruing to employees (including plant operations, security, and maintenance staff), regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts spent by the library for direct, paid employee benefits including Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, workmen's compensation, tuition, and housing benefits. Only that portion of any employee benefits paid out of the library's budget should be reported.

*This data element is reported to FSCS.*

## Collection Expenditures

51. Collection expenditures, total for **ALL** formats

Include all expenditures for materials purchased or leased for use by the public. Include print materials, microforms, machine-readable materials, audiovisual materials, etc. Include processing costs if they are billed with the materials.

*This data element is reported to FSCS.*

Note: The amount reported here should include the collection-related portion of the amounts reported under Operating expenditures for library materials in electronic format (# 102) and Operating expenditures for electronic access (# 103).

## Other Expenditures

52. Other operating expenditures

Include all expenditures not covered in the sections for personnel and collections. Include expenses such as binding, supplies, repair or replacement of existing furnishings and equipment, and costs incurred in the operation and maintenance of physical facilities.

*This data element is reported to FSCS.*

Note: The amount reported here should include the non-collection-related portion of the amounts reported under Operating expenditures for library materials in electronic format (# 102) and Operating expenditures for electronic access (# 103).

## Capital Outlay

54. Total capital expenditures

A capital expenditure is a payment for any cost, which is not part of the ongoing, day-to-day operational expense of running the library and paying salaries. Usually capital expenditures pay for building expansion, renovation, or other major, one-time projects. Automation projects are sometimes treated as capital expenditures.

*This data element is reported to FSCS.*

Note: Local accounting practices shall determine whether a specific item is a capital expense or an operating expense regardless of the examples in the definition.

## Unencumbered Operational

## Balance

55. Total unencumbered operational balance      Report operational funds that are unencumbered as of June 30, 2003.

## Library Collections

Count the total library collection, not just items added during FY 2002 -2003. Report physical units for items #56-68, and #109 which are defined as volumes, items or pieces. Items that are packaged together as a unit (e. g., two compact discs, two films, or two videocassettes) and are generally checked out as a unit, should be counted as one physical unit.

### Print

56-62. Books      Books are non-periodical printed publications bound in hard or soft covers, or in loose-leaf format, of at least 49 pages, exclusive of the cover pages; or juvenile non-periodical publications of any length bound in hard or soft covers.

*This data element is reported to FSCS.*

63. Serial volumes      Serials are publications issued in successive parts, usually at regular intervals, and as a rule intended to be continued indefinitely. Serials include periodicals (magazines), newspapers, annuals (reports, yearbooks etc.), memoirs, proceedings, and transactions of societies. Except for the current volume, count unbound serials as a volume when the library has at least half the issues in a publisher's volume.

*This data element is reported to FSCS.*

Non-Print Materials      Report here any non-print materials that are not designed to be processed by a computer.

65. Audio      These are materials on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically or electronically, or both. Included are records, audiocassettes, audio cartridges, audiodiscs, audioreels, talking books, and other sound recordings.

*This data element is reported to FSCS.*

66. Video These are materials on which pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver or monitor.

*This data element is reported to FSCS.*

67. Total subscriptions This refers to arrangements by which, in return for a sum paid in advance, periodicals, newspapers, or other serials are provided for a specified number of issues. Include print and microfilm subscriptions only; do not count electronic or digital subscriptions.

*This data element is reported to FSCS.*

Note: Count subscriptions purchased from the library's budget and those donated to the library as gifts. Count titles, including duplicates, not individual issues. Include the total number of subscriptions for all outlets. For example, if the library has four subscriptions to Time, then count four subscriptions.

**\*\*New Data Element\*\***

68. Discarded Materials Number of cataloged items that the library removed from the collection during the reporting year.

## **Service Measures: Circulation**

69-85. Annual circulation of all library materials of all types, including renewals. Count all materials in all formats that are charged out for use outside the library. Interlibrary loans checked out to users should be counted. Do not count intra-library loans (i. e. materials borrowed between branches) or items checked out to another library.

*The total of these data elements is reported to FSCS. Total circulation of juvenile materials is also reported to FSCS.*

# Other Service Measures

## Registered Users

86. Adults                      Number of adults in the community served who have registered as borrowers.
87. Juveniles                      Number of juveniles in the community served who have registered as borrowers.

## Attendance in Library

89. Number of persons entering library during the year                      Report the total number of persons entering the library for whatever purpose during the year. Include persons attending activities, meetings, and those persons requiring no staff services.

*This data element is reported to FSCS.*

## Programs

A program is any planned event which introduces those attending to any of the broad range of library services or activities, or which directly provides information through the presentation of talks, films, dramas, etc. Programs need not take place in the library, but the library must be the primary contributor of time, money, or people in the planning or presentation. Book talks, library tours, and presentations to classes in the schools are all examples of library programs. However, activities such as ongoing exhibits, contests run by the library, handouts, parades, or library booths at fairs would not be considered programs.

*The total attendance at juvenile programs is reported to FSCS.*

90. Adult programs - in library                      The number of programs for which the primary intended audience is persons age 15 and older AND which are held within a library building or on library grounds.
91. Adult programs - outside library                      The number of programs for which the primary intended audience is persons age 15 and older AND which are held outside a library building or grounds.
92. Juvenile programs - in library                      The number of programs for which the primary intended audience is persons age 14 and under AND which are held within a library building or on library grounds.

93. Juvenile programs - outside library	The number of programs for which the primary intended audience is persons age 14 and older AND which are held outside a library building or grounds.
95. Adult program attendance - in library	Attendance by ALL ages at programs for which the primary intended audience is persons age 15 and older AND which are held within a library building or on library grounds.
96. Adult program attendance - outside library	Attendance by ALL ages at programs for which the primary intended audience is persons age 15 and older AND which are held outside a library building or grounds.
97. Juvenile program attendance - in library	Attendance by ALL ages at programs for which the primary intended audience is persons age 14 and under AND which are held within a library building or on library grounds. Includes adults who attend programs intended primarily for children.
98. Juvenile program attendance - outside library	Attendance by ALL ages at programs for which the primary intended audience is persons age 14 and under AND which are held outside a library building or grounds. Includes adults who attend programs intended primarily for children.
101. Meeting Room Use (Non-library)	Number of events held in library meeting rooms for functions not sponsored, organized or initiated by the library.
102. Meeting Room Attendance (Non-library)	Attendance at events held in library meeting rooms for functions not sponsored, organized or initiated by the library.

**Reference & Information Transactions**

103. Reference questions	A reference transaction is an information contact that 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, or by phone, fax, mail or electronic mail from an adult, a young adult or a child.

*This data element is reported to FSCS.*

## **Interlibrary Loans**

Library materials, or copies of the materials, provided by one library to another upon request. The libraries involved in interlibrary loans are not under the same library administration; do not count "branch to branch" loans as interlibrary loans.

104. Items loaned  
(items provided to)

The annual count of library materials, or copies of materials, provided by one library to another upon request.

*This data element is reported to FSCS.*

105. Items borrowed  
(items received from)

The annual count of library materials, or copies of materials, received by one library from another upon request.

*This data element is reported to FSCS.*

# **Electronic Technology**

## **Operating Expenditures**

106. Operating expenditures for library materials in electronic format

Report operating expenditures for materials considered part of the collection, whether purchased or leased, such as CD-ROMs, magnetic tapes, and magnetic discs that are designed to be processed by a computer or similar machine. Examples are U. S. Census data tapes, locally mounted databases, serials, and reference tools. Include operating expenditures for equipment when the cost is inseparably bundled into the price of the information service product. Exclude operating expenditures for library system software and microcomputer software used only by the library staff.

*This data element is reported to FSCS.*

Note: These expenditures should also be included in Total collection expenditures (# 51) or Other operating expenditures (# 52).

107. Operating expenditures for electronic access

Report all operating expenditures from the library budget associated with the access to electronic materials and services. Include computer hardware and software used to support library operations, whether purchased or leased, and whether for a mainframe or microcomputer. Include expenditures for maintenance. Include expenditures for equipment used to run information service products when that expenditure can be separated from the price of the product. Report expenditure for services provided by national, regional, and local bibliographic utilities, networks, consortia, and commercial services. Report all fees and usage costs associated with such services as OCLC FirstSearch, or electronic document delivery. Do not report capital expenditures for items in this category.

*This data element is reported to FSCS.*

Note: Report only operating expenditures. These expenditures should also be included in Total collection expenditures (# 51) or Other operating expenditures (# 52).

## **Collection**

109. Materials in electronic format

Report the number of physical units such as CD-ROMs, magnetic tapes and magnetic disks that are designed to be processed by a computer. Examples are U. S. Census data tapes, locally mounted databases, reference tools, and serials on CD-ROM, tape, or floppy disk. Exclude bibliographic records used to manage the collection, library system software, and microcomputer software used only by the library staff.

*This data element is reported to FSCS.*

## **Services**

111. Internet terminals used by staff only

Report the number of computer terminals (PC, 'dumb terminal, ' etc.) that are used to connect to the Internet (graphical, text only, etc.) Report here terminals used by staff only. If both the public and staff use a terminal, count it as a public terminal.

*This data element is reported to FSCS.*

112. Internet terminals

Report the number of computer terminals (PC, 'dumb

used by general public terminal, ' etc.) that are used to connect to the Internet (graphical, text only, etc.) Report here terminals used by the general public, or by staff and public.

*This data element is reported to FSCS.*

## **Users**

113. Users of electronic resources in a typical week  
Count the number of users using electronic resources in the library in a typical week. Electronic resources include, but are not limited to Internet (WWW, email, telnet, other), online indexes, CD-ROM reference sources, software, and the online catalog. Do not include staff use of these resources.

*This data element is reported to FSCS.*

Note: The number of users may be counted manually, using registration logs. Count each user that uses electronic resources, regardless of the amount of time spent on the computer. A person who uses the library's electronic resources three times a week would count as three users. Software such as "Historian" can also be used to track the number of users at each public terminal.

**\*\*New Data Element\*\***

114. Remote OPAC Sessions  
A session is defined as a successful request of the library's online catalog from outside the library facilities (e.g., home, school, office). It is one cycle of user activities that typically starts when a user connects to the OPAC and ends by terminating activity in the OPAC that is either explicit (by leaving the database through log-out or exit) or implicit (timeout due to user inactivity).

**\*\*New Data Element\*\***

115. Virtual Visits  
A user's request of the library web site from outside the library premises regardless of the number of pages or elements viewed. Excludes web site visits from within the library.

# BRANCH INFORMATION

Several of the following items will be pre-filled in the online form, using data from last year's Directory of North Carolina Public Libraries. Answer this section for each service outlet, including central library, branches and bookmobiles.

116. Name of branch      Name of the branch library or outlet.  
*This data element is reported to FSCS.*
- 117.–120. Mailing address      The address for mail delivery via US Postal Service.
121. Street address      The complete street address of the branch or outlet.  
Note: **Do not report a post office box address.** For a bookmobile that operates from a central office or branch, report the address of the office or branch.  
*This data element is reported to FSCS.*
122. City      City or town in which the branch or outlet is located.  
*This data element is reported to FSCS.*
123. Zip code      The standard five-digit postal zip code for the street address of the branch.  
*This data element is reported to FSCS.*
124. Zip code extension      The four-digit postal zip code extension for the street address of the branch.  
*This data element is reported to FSCS.*
125. County      County in which the branch or outlet is located.  
*This data element is reported to FSCS.*
126. Phone number      The telephone number of the branch, including area code. Report telephone number without spacing or punctuation.  
*This data element is reported to FSCS.*

127. Fax number                      The fax phone number of the branch (if available), including area code. Report fax number without spacing or punctuation.
- This data element is reported to FSCS.*
128. Name of librarian or branch head                      The name of the person responsible for on-site management of the branch. The person who fills this role may not have the title "branch head" or "librarian". Report the name of the person who oversees staff and facilities at the branch, regardless of his or her job title.
129. Email address                      The complete email address of the person named above as branch head above, or the email address for the branch itself. If neither the branch nor the branch head has an email address, leave this field blank or "N/A".
130. Building square feet                      Provide the area, in square feet, of the public library outlet (main library or branch). Report the total area in square feet for each library outlet (main library or branch) separately. This is the area on all floors enclosed by the outer walls of the library outlet. Include all area occupied by the library outlet, including those areas off-limits to the public. Include any areas shared with another agency or agencies if the outlet has use of that area.
- This data element is reported to FSCS.*
131. FTE staff                      Total full-time equivalents of staff assigned to this outlet. Include all positions assigned to the outlet, whether those positions are filled or not. To compute FTE, take the number of hours worked per week by all employees and divide it by 40. Example: four employees working 12 hours per week would be considered 1.2 FTE ( $4 \times 12 / 40 = 1.2$ )
132. Hours open                      Enter the library's regular weekly schedule here. You may also include summer or other special hours. Examples: M-F: 8: 00 a. m. -5: 00 p. m. or T-Th: 2-8 pm; F: noon-5 pm; Sat: 9 am-noon; Sun: 2-5 pm (Labor Day -Memorial Day)
133. FSCS ID                      Identification code assigned by NCES to the administrative entity, with a unique suffix added to distinguish each branch. Note: LIBRARY STAFF SHOULD NOT EDIT THIS FIELD.

134. LIB ID State-assigned identification code for the branch.  
Note: LIBRARY STAFF SHOULD NOT EDIT THIS FIELD.
135. Outlet type code An outlet is a unit of an Administrative Entity that provides direct public library service. Select one of the following: CE = Central Library, BR = Branch Library, BS = Bookmobile( s).  
  
*This data element is reported to FSCS.*
136. Number of bookmobiles The number of bookmobiles in the bookmobile outlet record. Note: A bookmobile outlet record may include one or more bookmobiles. Complete this data element only if Outlet Type Code (# 131) is BS -Bookmobile( s). A bookmobile is defined as a traveling branch library. It consists of at least all of the following: 1) a truck or van that carries an organized collection of library materials; 2) a paid staff; and 3) regular scheduled hours (bookmobile stops) for being open to the public. Count the number of vehicles in use, not the number of stops the vehicle makes.  
  
*This data element is reported to FSCS.*  
  
Notes: If the library has more than one bookmobile, you may create a separate outlet record for each bookmobile or create one bookmobile outlet record and enter the total number of bookmobiles in this data element. Do not count other mobile units used for library programming that do not meet the definition of bookmobile above.
137. Metropolitan status code Select one of the following: CC = Within the city limits of the central city of a Metropolitan Area; NC = Metropolitan Area, but not within central city limits; NO = Not in a Metropolitan Area; UK = Unknown.  
  
*This data element is reported to FSCS.*  
  
Note: The State Data Center's map of NC Metropolitan Areas is available at [www.ospl.state.nc.us/demog/msaloc.html](http://www.ospl.state.nc.us/demog/msaloc.html). For bookmobiles, report the code which best describes their primary service area.

## FSCS CODES

Items #138-148 are used to identify various characteristics of the administrative entity (library system) for comparative analysis. These values will not usually change from year to year. Item #148 is supplied by the State Library and should not be changed. Note: Library staff should ignore this page of the worksheet; if changes are needed, consult the definitions on the online form and add an explanatory note using the STATE tab.