Ministry of Tourism, Culture and Sport

Annual Survey of
Public Libraries

Definitions

2019 Collection

Version 1.0
January
2020

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Purpose of this guide

This guide is a resource to help you complete your Annual Survey of Public Libraries and help you use the Library Statistics (LibStats) application. The guide provides definitions for all fields in the Annual Survey.

If you have questions or need help completing the survey, there are four Ontario Library Service consultants available to help. Please contact the Ontario Library Service office in your area.

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The Annual Survey of Public Libraries (and Ontario Public Library Statistics) is administered by the Ministry's Culture Services Unit.

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For any questions related to problems using Go Secure contact:
Go Secure 'Help' desk
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Introduction

The LibStats application compiles information from annual surveys of public libraries and organizations that contract with neighbouring public library boards for library service. Once compiled, statistical library data is used by the public library community and by the province of Ontario for library planning, program and policy development.

The Annual Survey of Public Libraries provides important data on library services in Ontario. **It is one of the requirements for receiving the Public Library Operating, Pay Equity, and First Nation Salary Supplement grants, and must be completed by public libraries, and organizations that contract for public library service.** We appreciate your co-operation in collecting and compiling accurate statistics for this survey.

Target Dates

To help ensure you receive your operating grant in calendar year **2020-2021**, please submit all requirements no later than the 2020 deadline. Submission of accurate and timely surveys helps enable the Ministry to publish 2019 Ontario Public Library Statistics in a timely fashion. Libraries are encouraged to submit their Annual Surveys well before the deadline to enable the Ministry to clarify data and publish the Ontario Public Library Statistics sooner.

General notes

Please refer to the following definitions in completing the **Annual Survey of Public Libraries**. Sections in this document correspond to sections in the survey form and the **One Week Survey of Library Use** (the 'typical week' survey). **In the Financial Section, please round all dollar amounts to the nearest dollar. Do not include cents.** Please answer all questions.

***Please note**: The Annual Survey of Public Libraries contains new questions and sections.

Comment Boxes

At the end of each section of this survey are blank comment boxes. Please use these boxes to elaborate on, or further explain the data that has been entered for that particular section. For example, if there is a large variance in a number compared with the previous year, use this box to briefly explain the reason for that variance. Each box has space for 1,000 characters.

Certification and Sign-off

Once a Public Library or First Nation Public Library signs-off on its submission, the submitting library can no longer make changes or corrections to the data, except by request to the Ministry.

Saving Data

Users should ensure that they save data frequently and before moving on to the next section. If you need to leave your computer, ensure that you save data before leaving. Please note that the LibStats will timeout after fifteen minutes of no activity.

Errors and Warnings

Error and warning messages, if there are any, will appear at the top of each section after saving. If there is a problem with the data in a particular section, this will be identified by a red exclamation mark ⚠ next to the field in question. Please review error messages by hovering over the ⚠ icon.

Delete Buttons (Red 'X')

Beside fields where you have selected programs etc. you will see Red Xs which indicate that you have entered data. These Xs can be clicked to delete that particular line of data.

Printing

You can print your entire survey as a report by clicking the 'Print Survey' button in Section I – Certification. This can be done for completed or blank reports.

What's new for the 2019 Collection?

A small number of changes were made to the 2019 Annual Survey of Public Libraries and its LibStats application for data collection during 2020. These are summarized below and incorporated into the guide.

Timelines

The Annual Survey will launch at the end of January with a final deadline of May 31st, 2020.

The public library sector has asked for its statistics to be published sooner. These new time-lines will help the Ministry to do that. To that end, when the survey launches at the end of January, the Ministry requests that libraries aim to submit surveys as soon as possible to enable the Ministry to meet requests for earlier public library sector statistics and text information collected in the survey.

No need to await a municipality, board or Band audit

Please note: you do not need to have your municipal or board or First Nation Band audit to fill out the Annual Survey's Financial section. You can use your best available financial or pre-audit financial information.

New Fields

A few new fields have also been added to the Annual Survey, based on annual consultation and input from the library sector.

For the 2019 Annual Survey you complete in 2020, you will see:
- A new E4.0 field for Facility Rentals and Bookings
- A new, E5.0 field for 'Pop-up' Libraries
- A new E6.0 field for Extended Services and Facilities
- A new H1.7.3 write-in field for Government Services Partnerships
- A new H1.9.3 write-in field for Business and Economic Sector Partnerships

Accessing LibStats

Connecting to the LibStats Application

A secure access registration form must be completed and submitted to the Ministry to enable best access to the LibStats database.

Logging on will result in:
- o A secure connection between your computer and the LibStats application via the Internet through the government's Go Secure security system.

o Access to specific LibStats functions (and menus) based on the role you have been assigned, e.g., library CEO, library contact.

You must register for a Go Secure account before completing the registration forms. You must use a valid email address associated with your institution for your Go Secure account. You must choose a password and remember to save it in a safe place.

*Note: Go Secure is completely separate from Transfer Payment Ontario (formerly Grants Ontario). You will have a different username and password for each system

** Please refer to the separate Go Secure User Guide **

*****Please also refer to the separate Visual Guide for filling out your
Annual Survey of Public Libraries*****

If you have to leave your computer or interrupt your data entry, be sure to save before doing so.

Note: Errors and warnings – the system will allow you to save if there are 'warnings' but if there are 'errors' you will <u>not</u> be allowed to save until they are corrected. Errors must be corrected before proceeding.

You should pay attention to both errors and warnings to ensure that data is correct.

This guide includes definitions for all fields in the Annual Survey of Public Libraries.

Notes:
1) Data will be validated upon entry and cannot be saved unless it conforms to the field requirements. Errors will be displayed in red. This is a sample error message:

2) Data for each form must be saved. If a change is made to the form and the "Save" button is not clicked, the following warning will be displayed:

   Click "**No**" to save the data.

3) Users will encounter these symbols on certain fields.

✖	Delete the row.
⊕	Add a new row.

The Annual Survey of Public Libraries

Section A – General Information

If you need to modify name, contact or address information in Section A, enter the information in the Comments box at the bottom of Section A and Ministry staff will update your contact or address information.

A1.14 Number of Active Cardholders (please state the number of library cardholders who have used their library card in the past two years).

Important: by entering your number of active cardholders in field A1.14 and saving it, you are then enabled to enter survey data and save it in subsequent sections.

A2.0 Current Library CEO (The Public Libraries Act requires public libraries to have a Chief Executive Officer. Library address and CEO contact information is pre-populated in the survey. Please ensure the CEO's first and last name, telephone number, fax number and e-mail address and library website are accurate. . If the CEO or other contact information has changed, please make a note of it in the Comments box at the bottom of the page)

A3.0 Contact Person (Please state the name, telephone number, fax and e-mail address of the person to contact if the Ministry has any questions about information provided on the survey, if the library CEO is not the contact person.)

Comment Box

Please use this box to highlight changes to mailing address, physical address of library, website URL or other important pieces of information for this section.

Section B – Financial Information

Note: You must round all amounts to the nearest dollar. Do <u>not</u> enter cents. For fields in Section B where there is not financial information applicable, please leave the field blank.

B1.0 Net Balance Brought Forward from Previous Year

B1.1: Report, as in standard accounting audit procedures. Check the appropriate box to indicate whether the amount you are reporting is a surplus, deficit, or nil. If there is neither a surplus
nor a deficit, you must click 'nil' and enter zero.

Examples

Surplus: Click Surplus and enter dollar
amount Deficit: Click Deficit and enter dollar
amount Nil: Click nil and enter 0 (zero).

Important Note: For fields from B2.0 to B4.10, leave the field blank if there is no financial data to enter. Do not enter "0". If you encounter problems saving, look for and remove "0"s.

B2.0 Operating Revenues
B2.1 Provincial Operating Funding:
- **B2.1.1** Public Library Operating Grant (PLOG)
- **B2.1.2** Pay Equity Grant
- **B2.1.3** First Nation Salary Supplement
- **B2.1.4** Total Provincial Operating Funding (automatically adds previous three fields) This is the annual library operating grant (B2.1.1) and pay equity funding (B2.1.2) that the library,
  First Nation Band Council or Local Services Board receives from the Ministry of Tourism, Culture and Sport. First Nation Salary Supplement should be reported in field B2.1.3). Do not include provincial Project Funds including Summer Experience funding in this field. Project Funds are reported in B 2.4.

B2.2 Local Operating Funding (e.g. Municipality or First Nation Band local operating funding) This is the amount of funding the library receives from the Local Municipal Council, First Nation Band or Local Services Board for library operations. If the municipality, county, First Nation Band or Local Services Board pays library related facility/utility costs and salary and benefit costs, the amount of those payments must be included in the Local Operating Grant (to reflect local support); and in the facilities/utilities expenditure line (B4.4) (to ensure that all library related facility/utility expenditures are captured).

B2.3 Contract Revenue
Some library boards have contracts with local services boards, municipalities and First Nation Bands to provide their residents with library services. If your library has such a contract, report revenue received here. Specify the names of the contracting municipalities, local services boards, or First Nation Bands and give the amounts you receive from each organization.

B2.4 Project Grants: This is targeted funding received from government or other organizations through an application process or as year-end capacity support to undertake projects. Examples of project funding include Trillium Foundation funding, special funding programs to hire summer students, ServiceOntario, and Young Canada Works. Choose all that apply from the drop- down menu. Specify any Project Grants not included above in the "Other Project Grant" write- in fields.

B2.5 Donations: Please state the amount of money donated as a gift to the library by individuals, Trust Funds or such organizations as Friends Groups or Public Service Clubs. Do not report value of "in kind" donation.

B2.6 Self-generated Revenue:
This is the amount of funding generated by the library from fees, non-resident fees, fines, room rentals, photocopy or fax services, sales/fundraising, café revenue, program and events, revenues etc.

B2.7 Debt Services and Reserve Fund
Revenues: Please report the total amount of
the following:

- debt services: receipts from the municipality/municipalities for which the library was established; and,
- transfers from reserve funds: revenues received from reserve funds (special or restricted accounts). For the purposes of this report, the balance brought forward from the previous year is not a reserve fund and should not be reported here.

B2.8 Other: Report funding under the "other" category only if it does not fall under any of the previous categories (e.g., Connectivity, interest, contracts for service with school boards).
***The reporting library should list other funding, including the amount. Report year end funding or capacity building funding support for Ontario public libraries, and credits administered by Ontario Library Service organizations, in B2.4 Project Grants above.

B2.9 Total Operating Revenue:
This is the combined total of all revenues in Section **B2.**

B3.0 Capital Revenue

B3.1, B3.2, B3.3: Capital Revenue is funding that the library has received for land, building construction/renovation or furniture or new automation systems. Report the amount received from Provincial, Federal or Local Governments (e.g. funds from development charges) in the spaces provided.
- **B3.4** Other revenue - If the library has received capital revenue from a non-government source (e.g. capital funding from a friends group), please report that capital revenue (including the name of the source) under the 'other' category). Report library portion if known for multi-use buildings otherwise report full multi-use building amount. If reporting full multi-use, put in the 'Comments' box.

B3.5 Total Capital Revenues - This is the total of B3.1 – B3.4 inclusive.

B4.0 Operating Expenditures

Note: The Survey uses "**cash accounting**" focusing on actual expenditures for items purchased

and does not use "accrual accounting".   Do not subtract a depreciation or amortization amount from actual expenditures figures. Do not report amortization and depreciation including in B4.10 Other Expenditures or B6.0 Total Capital Expenditures.

B4.1 Materials Expenditures fall into two categories:
- **B4.1.1** <u>General</u>: Report the total amount spent on the purchase of physical items for use by the public, in all formats except subscriptions to computer readable materials. Do <u>not</u> count payments for acquisition, cataloguing, processing, or binding services on this line, as it is included under 'other'.
- **B4.1.2** <u>Electronic</u>: Report the amount spent for subscriptions to electronic materials including such items as CDs and DVDs, electronic subscriptions and other databases, and e-resources. Include Overdrive in your totals for this field.

B4.2 Staffing: Total amount spent on all staff (full-time, part-time, casual/occasional/relief and seasonal staff) employed by the library in the reporting year, including all employer contributions to benefits and pensions.

B4.3 Staff Training: Report all funds spent on staff training through courses, workshops and conferences, whether electronic or in person. Include related travel and accommodation expenditures.

B4.4 Facilities/Utilities: State the total amount spent on library facilities during the reporting year, including rent, heat, electricity, equipment contracts/rental (e.g. photocopier), maintenance, repairs, mortgage payments and insurance. Include here any contracts for janitorial, landscaping or security guard services. Include payments for furniture and equipment only if the purchases were made as a part of the library's operating budget (e.g. replacement of broken chairs).   Do not report telecommunications costs here, as they are collected under telecommunications costs. If the municipality, First Nation Band or county pays library related facility/utility costs, the amount of this payment should be included in the overall facilities/utilities expenditure. The amount is also captured on the local operating grant line (B2.2) to reflect local support in the revenues subsection of the survey.

B4.5 Telecommunication Costs
- **B4.5.1** <u>Phone and Fax</u>: state the costs incurred for library telephone and FAX services
    (exclude costs for dial-up telephone lines that are reported below).
- **B4.5.2** <u>Dedicated Internet Connectivity Costs</u> and/or dial-up lines used exclusively
                                    to
    connect to an ISP: report here such costs as the amount spent for ISDN dedicated lines, wireless communications services, cable or satellite costs for Internet services, and dial-up telephone lines used exclusively to connect to an ISP. If it is not possible to separate out your dial-up lines from your telephone lines, report this cost on the line B4.51 for Phone and Fax.

B4.6 Computer Services: Report the total amount spent on automated system upgrades, computer equipment and software, including equipment purchased through such programs as Community Access Program (CAP). Do not report telecommunications costs related to computer services here, as they are collected under B4.5 telecommunication costs.

B4.7 Debt Charges and Transfers to Reserve Funds: Report the payment on principal and the payment of interest on the principal (debt charges). For transfers to reserve funds, report those funds which have been moved to a reserve fund account.

B4.8 Funds Returned to Government Sources: If your library board is required to return any surplus operating funding to the governing municipality or band, report such returns here. Include funds that have been returned to the Federal and/or Provincial government(s).

B4.9 Contract payments made to library boards for library service: if your organization provides library service by contracting with a library board or boards, give the name of the library board(s) and the amount paid to each.

B4.10 Other: Please review all of section B4, before reporting any expenditure under B4.10. Report other expenditures not cited above. Include such items as contracts for consulting, legal and audit services, payments for acquisitions, cataloguing, maintenance contracts, processing, binding, repairs to things other than equipment, postage or shipping related to acquiring library materials or programming costs such as speaker and performers costs, television costs, and advertising and promotional costs.

*As indicated by the pop-up information bubble on B4.10, please **DO NOT report any Amortization expenditures**.

Comments – Provide any relevant comments.

B5.0 – Total Operating Expenditures
  Provide the total for all operating expenditures in Section B.

B6.0 – Total Capital Expenditures
  • Report the total amount spent for land, building construction, renovations (e.g. new roof), new furniture, new automated systems and funds expended for the initial collection of circulating and reference materials for a new library or library branch. For multi-use buildings report library portion and, if no, otherwise report full costs and indicate in Comments Box the library percentage of square footage. Do not report funds expended to repair or replace worn or broken furniture in an existing library facility as a capital expenditure. Expenditures to replace worn and broken furnishing are reported as Operating Expenditures B4.4 Facilities Utilities.

Comments - Use this comment box to highlight significant changes or variations in financial

data from previous years or to elaborate on other items related to project funding. Describe any major new expenditure such as capital etc.

Click **Save** to save all the data in Section B.
Click **Next** to go to the next form.

Section C – Library System Holdings

C1.0, C2.0, C3.0: The Library System Holdings Chart collects information on all library holdings. The chart requires libraries to categorize their holdings into one of three categories: Circulating and Reference, Periodicals, Databases and Downloadable items, and Streaming and Downloading services and subscriptions. The holdings chart also collects data on language, titles held and volumes held, and include a special area in each category for reporting on electronic resources. **Please Note**: Volumes and copies will always be greater than, or equal to your number of titles.

- Do not count a title, volume or electronic resource in more than one category (e.g. if you count a title in the circulating and *reference* category, you cannot count it again in the periodicals etc. category).
- Exclude materials that the library accesses through a "pool" (e.g. OLS pool, regional pool) as these items are not a part of the library's collection.
- Count music in the language in which it was catalogued, published or issued (i.e. if a recording was catalogued in French, it is counted as part of the library's French holdings)
- Count a multi-media kit based on its primary component. For example, a multimedia kit, whose primary component is a CD should be counted as a CD.
- For bilingual materials, count titles based on how they are catalogued (e.g. if a library catalogues a bilingual publication in both languages, it counts the document once in English and once in French).

Definitions (these categories are used in Sections C1, C2, C3 and C4)

Titles Held: A title is a unique catalogue entry, and includes books, tapes, videos, multi-media sets etc. Multiple copies of a single title count as one title.

Volumes Held: A volume is a physical unit. For example, a print encyclopedia has one title and is normally composed of many volumes.

Special Collections: A special collection is any collection of materials that is unique to your library and that is not captured in the regular catalogue system of holdings. (e.g. A local history collection that includes original photographs, pamphlets or other locally relevant items or; another example could be a special Theatre Collection that includes books, plays, original scripts etc.)

If a special collection is already captured in the regular holdings of a library, please indicate the name of your collection in the Comment Box at the bottom of the section.

Electronic resources: All materials owned or licensed by the library that are only accessible in computer readable format and / or other electronic devices are electronic resources. The Electronic Resources category includes subscriptions to commercial databases, CDs and DVDs, E-books, Audio- books, gaming software, downloadable media, and non- commercial locally

created databases, e.g. local history collections in digital form.

When counting electronic resources count each database subscription as one subscription.

For CDs and DVDs, and E-books, report both the number of titles, as well as the number of copies of each CD or DVD title, and E-book title held.

Please note: DVD titles should only be counted once, even though multiple languages may be available on the same disc.

For electronic periodicals (i.e. periodicals that are electronic resources) report the following: the number of periodical database subscriptions, and the total number of individual electronic periodicals titles. For example, a library with electronic subscriptions to Electric Library and CPI.Q would report two electronic subscriptions, and the total number of individual periodical titles available through them.

Note: SOLS compiles a summary data chart of electronic holdings (e.g. databases and e-periodicals) supported by SOLS purchasing. Please use the chart to include electronic holdings relevant to your library. Data is available on the SOLS site and also on the Help tab in the EDCS / LibStats database.

Circulating and Reference Holdings

Beginning with the 2016 Survey collected in 2017, Circulating and Reference holdings are combined.   C.0.1, C0.2, C0.3.1, C0.3.2, C0.3.3 and C0.3.4 enable a library to report on its circulating and reference collections together including all formats e.g. books, CDs and DVDs, e-books and e-audio.

C0.4 and C0.5 Special Collections: 'Original' items the item in original formats (e.g. an original photograph or pamphlet). 'Digital' items include digitized copies of original items (e.g. a digital version of an original photograph). Note: every photograph, or other record or piece of information in a collection counts as 1 item.
C3.1 Print Periodical Titles: Print Magazines, newspapers and other publications issued in instalments. Exclude standing orders (e.g. annual almanacs and directories that in print format are recorded in C0.1 and C0.2 above).

C3.2.0 Databases and Database Subscriptions: Report locally created databases such as for archive, municipal records, newspaper, local history, special collections and genealogy records, and databases subscribed to whether by the library or through consortia purchasing such as by SOLS.

C3.2.4 Report number of Individual Electronic Periodicals Titles included as part of database subscriptions.

Additional Electronic Resources definitions

Gaming software: Electronic software title which is typically packaged in DVD Rom format and is played through a platform (a.k.a. system) and viewed or played on a monitor or television device by the participants. I.e. platform = Nintendo Wii Gaming software title = Donkey Kong Country Returns.

Playaway: A standalone pre-loaded audio book device requiring battery power and head phones which contains one audio title. The Playaway device is typically loaned out to library patrons in the same fashion as normal print material from the library collection.

Downloadable Media: Formatted electronic files (media) that can be downloaded or transferred from an existing database, repository or file sharing system and freely used, stored or transferred by the patron for personal use onto another electronic device including but not limited to, mp3 players or other proprietary audio playback devices, proprietary electronic reading devices, usb storage devices, cellular phones, personal computers or other types of personal media players. Downloadable media often will appear in proprietary file formats which will only play on defined devices. Mainly downloadable media appears in more common or universal or open source formats such as mp3, pdf.

C4.1, C4.2, C4.3 Downloading and Streaming Services:
A downloading and streaming service is a service that enables users to "borrow" or have temporary access to, eBooks, audio books, comics, movies, music, and television shows online, through various platforms (i.e. Freegal, Freeding, Hoopla, RB Digital, IndieFlix, Flipster, Naxos)

Count each downloading and streaming subscription service provider **as one service** and enter in a numeric value.
Please select from the drop down menu the service providers your library subscribed to in the survey year. Please enter in any not listed in the drop- down menu, under "Other".

Comments – Provide any relevant comments

Click **Save** to save all the data in Section
C. Click **Next** to go to the next form.

C5.0 E-Learning Services

C5.1 – In the field provided, please indicate the number of e-learning services offered by your library (e.g. Lynda.com, Gale Courses, Learning express, Mango etc.) These can be any learning courses for any subject area, so long as they are available via the internet.

C5.1.1 – Using the drop-down menu, please select <u>all</u> of the E-Learning services you provide access to at your public library. If a particular service is not on the menu, select 'Other' and write-in the name of the service. You may select 'Other' more than once.

C5.2 – In the field provided, please indicate how many individual library cardholders took e-learning courses offered by your library. You may count the same cardholder more than once if they have taken more than one e-learning course from different vendors.

C5.3 – In the field provided, please indicate the total number of e-learning courses that were taken by all cardholders at your library. (e.g. 5 different courses taken by 1 cardholder would count as 5)

C6.0 Non-traditional Collections that circulate

C6.1 – In the write-in field below, please list all of the non-traditional, circulating library collections available at your library (e.g. fishing gear, snow shoes, musical instruments, seed gardens etc. that your library circulates to the public). Please list all non-traditional collections which you circulate to the public.

Section D – Library System Staffing

This section asks for information on full time and part time library staff and volunteers organized by job class. Assign staff to job classes based on the qualifications for the job class. As many library employees work somewhat different hours in the summer months, do not use summer hours as a basis for staffing reports. Report staffing based on hours worked in a typical week in the calendar year.

- **D1.1** <u>Full Time</u>: A full time job class is one where an individual works at least 35 hours per week or full time equivalent. Count workers in job classes working fewer than 35 hours per week or full time equivalent as part-time.* **If your library does not have any job classes that work 35 hours or more or full time equivalent per week do not report any full time employees.**
- **D1.2** <u>Part Time</u>: A part time job class is one where an individual works fewer than 35 hours or full time equivalent hours per week.

D1.0 <u>Full-time position</u>: State how many hours per-week constitutes a full time position in your library. Please note that question D1.0 must be completed with a number of 35 or more, unless your library qualifies for the exemption* indicated below, as that is the figure employed by the annual survey system to calculate full-time equivalents.

* Libraries that recognize fewer than 35 hours as a full-time equivalent position (e.g. some libraries recognize 32.5 hours in their collective agreements) can enter that number.

If your library does not have any job classes that work 35 hours or more per week, please complete D1.0 stating how many hours a full-time position would be if your library had full time staff, report that you have no full time job class staff in section D1.1, and report all job classes as part-time in D1.2.

If your library does not have any full time job classes that work 35 hours or more per week, and you do not know how many hours a full time position would be if your library had full time staff, please complete question D1.0 using the number 35, as that is the figure employed by the annual survey system to calculate full time equivalents. Then report that you have no full time job class staff in section D1.1, and report all job classes as part-time in D1.2.

D1.1 - Full Time Staff Table
State the number of people that work in the library in the following job classes:
- Librarians: The number of full time staff holding a degree in library/information science from an accredited school e.g. MLS, MIS, MLIS with the qualification recognized in the job class.
- Library Technicians: The number of full time staff holding a diploma in library techniques from a community college with the qualification recognized in the job class.
- EXCEL Graduates: The number of full time staff holding an EXCEL certificate
- Other Specialized Professional Staff: The number of full time staff holding a non-library degree, diploma, certificate or equivalent qualification from a recognized school or program (e.g. accountant, information technology professional, human resource professional, fund-raiser) with the specialized or professional qualification recognized as a requirement in the job or job class. If a job requires a general non-library degree such as a Bachelor degree, report these staff under Other Staff.
- Other Staff: All other full time staff not included above
- Volunteers: The number of full-time library volunteers - including volunteers involved in such activities as literacy programs, book sales, story hours, shelving, book mending etc. Do not count hours that library board members spend on official duties (e.g. board meetings).

D1.2 Part Time Staff Table

State the number of people that work in the library in the following part time job classes and the total number of hours worked per week for each job class. Calculate the total hours worked per week for each job class by adding the total weekly hours or the total weekly hours worked for all people in the job class.

Fixed Hours Example:
If a library had three part time staff in the Librarian job class, and each person worked 20 hours per week, the library would report a total of 60 hours per week for that job class. If a library had four Library Technicians, one working five hours per week, one working 10 hours per week, one working 15 hours per week, and one working 17 hours per week, the library would report a total

of 47 hours per week for the Library Technician job class.

Varied Hours Example:
If the hours worked by people in a job class vary, report the total average weekly hours worked. (e.g. if there are 2 people in the librarian job class, and one normally works 8 hours per week, and the other works 10 or 12 hours per week, report 2 people in the job class working a total of 19 hours per week.)

- Librarians: Part time staff holding a degree in library/information science from an accredited school e.g. MLS, MIS, MLIS with the qualification recognized in the job class.
- Library Technicians: Part time staff holding a diploma in library techniques from a community college with this qualification recognized in the job class.
- EXCEL Graduates: Part time staff holding an EXCEL certificate
- Other Specialized Professional Staff: Part time staff holding a non-library degree, diploma, certificate or equivalent qualification from a recognized school or program (e.g. accountant, information technology professional, human resource professional, fund- raiser) with the qualification recognized as a requirement in the job or job class.
- Other Staff: All other part time staff not included above. Count hours worked during the reporting year by staff who are called in for shifts not regularly scheduled here.
- Volunteers: Part time library volunteers, including people involved in literacy programs, book sales, story hours, shelving, student community service, book mending etc. Do not count hours that library board members spend on official duties (e.g. board meetings).

D1.3 Students, Co-op Students, and paid Interns hired for a specific length of time

D1.3.1 – In the space provided, please indicate the total number of students, co-op students, and paid interns that your library hired for a specific, shorter length of time (e.g. summer, term, two or three months or semester etc.). These are temporary staff to who do not readily fall under regular 'full' or 'part time' status.

Do not count library pages who work part-time throughout all or much of the year and who (coincidentally) are also students. They are included under part-time staff.

Comment Box
Please use this box to elaborate on major staffing level changes or to further elaborate if your library has full-time equivalent staffing hours less than 35 hours per week etc. (e.g. different from the norm).

Click **Save** to save all the data in Section D.
Click **Next** to go to the next form.

Section E – Library System Facilities

E1.0 Public Access Workstations
This section asks libraries for information on public access workstations. Public access workstations are computer workstations used by the public.   Exclude workstations that are designated for staff use (e.g. workstations used by staff located on the information/reference desk).

E1.1.1, E1.1.2 Public Access Workstation Table:
State the total number of public access workstations located in the library and indicate how many provide Internet access, and OPAC or ILS access.
E1.1.4 Laptops, Netbooks and Tablets (e.g. iPads)
State the total number of Laptops, Netbooks and Tablets the library has available for in library use or loan.

E1.2 E-Readers
State the total number of E-readers the library has available for in-library use or loan.

E2.0 Library Automation and Connectivity

E2.1, E2.2: Indicate whether the library has an Integrated Library System (ILS) or automated catalogue of holdings. If an ILS or automated catalogue of all holdings in the library system exists, specify the system used.

E2.3: Indicate whether or not the library provides a wireless Internet connection.

E2.4, E2.5: Indicate whether or not the library provides / has a 3-D Printer.

A 3-D Printer is considered to be a machine allowing the creation of a physical object from a three-dimensional digital model, typically by laying down many thin layers of a material in succession" This can include additive technologies that print objects by using a variety of techniques to layer on materials. This can include a 3-D printer that is a resin printer.

If the library has one or more 3-D Printers, enter a numerical value to report how many 3-D Printers the library has.

E2.6, E2.7: Indicate whether or not the library provides a Maker Space, mobile Maker Space, Digital Media Lab, Digital Learning Centre, Self-Publishing Centre, Recording Studio etc. If the library does provide these services, indicate how many are provided.

E2.6, E2.7: Indicate whether or not the library provides a Maker Space, mobile Maker Space, Digital Media Lab, Digital Learning Centre, Self-Publishing Centre, Recording Studio etc. If the library does provide these services, indicate how many are provided. Please count each space as one service. For example, if you have one lab that includes a 3-D printer and a green room in the

same defined space such as a room or a single defined area of the library, please consider that as one space and count it as one service. If you have one Maker Space and in a distinctively separate part of the library you have a Self-Publishing Centre, count that as two spaces and therefore, two services for the purpose of this data field.

Note: Different terminology is used among the Library community to identify or name these services. Please interpret the naming definition(s) of these services liberally. Please include services you have implemented whether at your library facility or mobile or both. Do not count a computer training centre if its use focuses exclusively on public access computer training and basic Internet skills.

E2.8 – Wireless Hot Spots

E2.8 – In the space provided please indicate the number of circulating wireless hot spot devices your library has. These are also known as 'pocket Wi-Fi' devices. This is separate from Wi-Fi hotspot areas located within your library building.

E3.0 Facilities and Hours of Operation (all service points)

E3.1, E3.2, E3.3, E3.4, E3.5, E3.6: Provide information on the number of library service points and the total weekly hours of public operation for each. Base your report on winter hours or hours open during a typical week.
To be considered a service point, an outlet must meet the following criteria:
- offer library service directly to the public,
- be open at regularly scheduled times,
- have a permanent collection, and
- be staffed by library personnel.

There are five types of library service points, they are: the main library, branches open 12 hours per week or more, branches open less than 12 hours per week, bookmobile stop locations, and deposit stations and kiosks.

To be a service point, a deposit station or kiosk must have ongoing collection management through staff visits or collection rotation managed by library staff. An example would be a deposit collection in a nursing home that is rotated quarterly by public library staff or a kiosk dedicated to or providing public library services in a community centre.

This section also asks for two types of information related to bookmobiles: the number of bookmobile stop locations and the number of bookmobiles owned by the library (e.g. a library could own one bookmobile with stops in four locations). For bookmobile stops, report the number of unique locations where a bookmobile stops, not the number of times a bookmobile stops at a specific location – e.g. If a bookmobile stops at 4 locations 5 times a week, it reports 4 bookmobile stops)

Comment Box - Please use this box to advise of new branch openings, branch closures, the acquisition of new library systems etc.

Click **Save** to save all the data in Section E.
Click **Next** to go to the next form.

E4.0 Facility Rentals and Bookings

E4.1 Facility rentals and room bookings can include a meeting or program room, or other library space (indoor or outdoor) that is paid for, or used free of charge, by a third-party individual or organization for an event that is not part of the library's regular programming. This can include seminars, discussion groups, celebrations etc. These rentals or bookings must be arranged ahead of time. Do not include regular walk-in use of library facilities.

E5.0 Pop-up Libraries

E5.1 A 'pop-up' library could be a moveable kiosk, folding table, trailer or other portable public library access point that helps the library provide outreach services. It is a staffed service point. It may travel to different locations such as to community centres, malls, fairs etc. on a regular or occasional basis. For this question, give the number of times the individual 'pop-up' library access point appeared in the community. Do not include bookmobiles, kiosks, deposit stations, or 'Little Free Libraries'.

E6.0 Extended Services and Facilities

E6.1 Extended services and facilities include any location or activity that is open or takes place beyond or complements regular public library opening hours. An example could be a 'pop-up' library trailer that is out before or after regular branch hours, a remote location or study hall that is open after hours, hold lockers or other service points that extend beyond public library hours of operation.

Section F – Library System Activities

F1.0 Total Annual Circulation (Actual Annual Direct Circulation)

Report the total number of items charged out from your library's collections for use outside the library. Include circulation of all print material, physical CDs and DVDs, physical audio-books, downloadable e-books, downloadable audio as well as non-traditional materials from your collection.

- Count one for each item charged out, and one for each item renewal.
- Include in your circulation total, the circulation of items borrowed from other libraries and then provided to your library users.

- Include the circulation of rotating (such as a pool of large print) or bulk loan collections that were provided to your library users.

Note: If your library does not have a full year circulation count to enter in F1.0, take your Typical Week number for G1.1.1 circulation of all library materials except E-books and downloadable resources and multiply it by 50, take your Typical Week number for   G1.1.2 circulation for e-books, downloadable audio books, music and video and multiply it by 52, add the two and enter the result in F1.0.

F2.0 Annual Programs

F2.1 Number of programs held annually, and **F2.2** Annual Program Attendance will be populated automatically when you fill out your program details in **F2.3 (see below)**.

A program is a presentation given at a scheduled time by library staff or another resource person to a group of library users. Include children's story hour, class visits, scheduled tours of the library and talks given to classes or groups that introduce users to library materials or services.

Programs can take place outside the library (e.g. book talks in a classroom). **A program can be a planned presentation. It can also be passive programming.**   To avoid double counting, only the library in the jurisdiction where the programs are presented should report the program and its attendance.

- Include co-sponsored programs if library staff are involved in planning, implementing or presenting the programs,
- If each session requires specific preparation and covers a different topic, count each session as a separate program. (e.g. If a library had a summer reading program and each
  session covered a different topic requiring different preparation, then those would count as separate programs.)
- Exclude activities such as exhibits, contests, parades, or library booths at fairs,
- Exclude the use of library meeting rooms by groups other than the library itself.

F2.3 Program types: Please list all that apply in the list below and provide total numbers (programs and attendees) for each.

Clarification: **If a program matches two or more program categories, select the one you believe the program matches.** For example, if your library offers a Toddler Time program, record it as either "Early literacy and early learning" or "Other Children's programming" but not both.

Note: the list of program types covers some leading programs that public libraries provide. It is not intended to be an exhaustive list. **The number of programs in the list and attendees in total a library reports should be equal to or less than the total program and program attendance data reported in F2.1 and F2.2. A library may have additional programs not addressed in the F2.3 program type list.**

- **Early literacy and early learning**: include programs designed for children up to and including the age of 6. If a family literacy program has "literacy for children" as its focus, include it here.
- **Other Children's programming**: any children's programs that do not focus on children's early literacy and early learning (e.g. puppet shows or crafts. etc.)
- **Summer Reading**: any summer reading programs that are a part of a library's regular programming including corporately sponsored summer reading programs
- **Homework help**: this includes programs designed to help elementary and high school level students with their homework in any subject.
- **Class instruction at a library or school**: please include all programs in which a class comes to the library for programming or when library staff attend a school as part of the library's programming.

- **Teen programming:** any programming that is specifically targeted for teenagers.
- **Newcomer focus**: include any programs aimed at helping new residents or new Canadians to integrate and settle in Canada.
- **Careers, job help / skills**: any programs that help provide youth and adults with help/advice in finding a job, career development and other employment-related skills.
- **Business Development**: this can include any program that provides help/advice to current or prospective small, medium and large business entrepreneurs.
- **Community Development:** this can include programming that addresses community capacity building, community empowerment or organizing, municipal planning or
- municipal cultural planning, forums for public input and participatory planning, community-based planning and group work, or that brings together representatives from a number of sectors for development and planning purposes.
- **Technology, social media and computer literacy**: programs designed to help patrons of all ages and skill levels with the knowledge and use of various technologies, computer software and social media practices that are not included in "Maker space, Digital media lab, Self-publishing" below. Include computer skills, internet, and social media training, as well as e-reader orientation training.
- **Maker space, Digital media lab, Self-publishing**: if your library has a Maker Space, mobile Maker Space, Digital Media Lab, Digital Learning Centre, Self-Publishing Centre, Green Screen, Recording Studio enter the number of programs offered and attendees. Required training, such as safety training for 3-D printer use, can be included in this field. Libraries use different terminology for these services (e.g. hacker space), please interpret your service liberally as applicable to this field.
- **Genealogy, local history, Doors Open**: any specialized program or event aimed at helping patrons undertake genealogical research or, events promoting local history or Doors Open within the community.
- **Adult learning** (not covered elsewhere): any other programs aimed at helping adults 18 years of age or more.
- **Seniors programming:** any programming specifically targeted for seniors.
- **Culture Days, poetry and short story readings, art shows**: please include every instance of a session or event related to Culture Days, readings, art shows or related programming not included elsewhere.

- **First Nations Public Library Week**: Include Launch events and all other programs planned specifically for this Week.
- **First Nation Communities Read**: Include all programming and displays based on the year's selected titles and other recommended books.
- **Indigenous language training and retention**: Include all Indigenous language training and retention programs that the library holds, hosts or partners in. This can include programs held at the library or off-site from the library that the library partners in.
- **Ontario Public Library Week / Canadian Library Month**: Include any Launch and all other programs planned specifically for this Week and Month.
- **Book Clubs:** Include all book clubs, excluding children's and teen programming.
- **Other:** Include all other program types not found in the list above.

F2.4 – Service visits provided to residence-bound residents and people-at-risk

F2.4 – In the space provided, please indicate the annual number of visits library staff or volunteers made to library patrons who were residence-bound or are considered 'at-risk' in your community. These include visits to group homes, nursing homes, or private residences. These visits can also be to people who have difficulty visiting the library but who may not be residence-bound. Please state the total number of visits during the year.

F3.0 Inter Library Loan Activity (ILLO)

Inter Library Loan (ILLO) is the loan of an item from the permanent collection of one library system to another or the supply of a substitute item (a photocopy). Do not count inter-branch loan (i.e. loans between branches of the same library system). An ILLO request is made when one library asks another library to borrow one or more items.

The VDX Monthly ILLO Statistics Report provides the data required to complete this section of the annual survey. It allows you to view monthly statistical reports of your ILLO activity. To view a statistical report in the VDX system, log into your VDX account:
1. Select Reports in the left panel of VDX screen.
2. Check the radio button beside Monthly ILL Statistics.
3. Leave the Start Date and End Date boxes at the bottom of the menu blank.
4. Click Submit.
5. The report will appear on your screen. Use your browser's print command (File - Print, or the Printer icon) or select, copy, and paste data to an Excel spreadsheet.

Note: Please pay close attention to F3.0 numbering since it was changed in 2011 to better align borrowing and lending activities.

F3.1 Requests Made and Items Borrowed

F3.1.1 Number of requests made to other libraries: this is the total number of ILLO requests that your library made. This is called 'Requester – Requests' on the VDX system report. It counts the number of requests that the library created and sent to other libraries in the

specified year.

F3.1.2 Number of items borrowed: this is the total number of items that your library borrowed as a result of its ILLO requests. This is called 'Requester – Received' on the VDX system. It counts the number of requests that the library processed as 'received' for the specified year.
F3.2 Requests Received and Items Lent

F3.2.1 Number of requests received from other libraries: this is the total number of ILLO requests that other libraries sent to your library. This is called 'Responder – Requests' on the VDX system. It counts the number of incoming requests that the library handled in the specified year, regardless of whether the library 'shipped' them or not.

F3.2.2 Number of items lent: this is the total number of items that your library loaned other libraries via ILLO. This is called 'Responder-Shipped' on the VDX system. It counts the number of requests that the library processed as 'shipped' in the specified year.

Section G - Library System Activities

G1.0 Typical Week Data

Note: Section G is for typical week data and not for the recording of annual data. Use data from the *typical week* survey to report on weekly Circulation, In Library Materials Use, Electronic Information Resources Use, Reference and Library Visits below.

A library that believes it has reliable annual data for applicable Typical Week Data fields and may not have completed a typical week survey may use its annual data for typical week fields but <u>must</u> divide that data by 50 and input a weekly figure in the typical week fields covered below. Annual data may also be divided by 52 for data fields that are not dependent on the library being open (i.e. G1.1.2 circulation for e-books, downloadable audio books, music and video; G1.3.2 access to electronic databases, G1.5.2 number of electronic visits to the library website and G1.5.3 number of Social Media visits) Completion of Typical Week Surveys helps support consistency of data reporting.

G1.1 Circulation (typical week data)

G1.1.1: Report the total circulation of all library materials except E-books and downloadable resources (e.g. downloadable audio books, downloadable music and downloadable video) checked out from the library's permanent collection of materials directly by library users for use outside the library. Remember to include:
- renewals made in-person, by phone or electronically;
- items borrowed on inter-library loan from other library systems that were circulated to your library users;
- the initial circulation of rotating or bulk loan materials to a deposit collection. (e.g.. rotation of 4

times a year X 500 items = 2000 circulation), and <u>exclude</u> the actual or estimated subsequent circulation of bulk loans of those items to users

Be sure to exclude:
- photocopies in lieu of loans; and
- loans to another library system or branch.

G1.1.2: Report circulation of all E-books, downloadable audio books, music and video including OverDrive, RB Digital, Freegal and similar services.
- Include all downloads (and renewals if technologically applicable) of E-books, audio books, music and video, including OverDrive, RB Digital, Freegal and similar services.

Do not include the circulation of physical CDs and DVDs or physical audio books in this number (that number should be included in G1.1.1.)

G1.1.3: Total Circulation of all Library Material **–** Total of G1.1.1 + G1.1.2.

G1.2 In Library Materials Use (typical week data)

G1.2.1: Report the number of materials used inside the library and not checked out. Count any items removed from their usual location by staff or library users. Include reference materials, circulating materials, magazines, newspapers and all other materials used in the library.
- Count a vertical file, pamphlet file, multi-media kit or language learning kit as a single item - do not count each file and kit component as a separate element.
- Do not count audio-visual items unless they were used at viewing/listening stations available in the branch.
- Do not include items returned from an outside circulation.

G1.3 Electronic Information Resources and Wireless Use (typical week data)

G1.3.1 Number of people using library workstations: Count the number of people who use public access computer workstations in the library, either from sign-up sheets or by a manual stick count. Do not factor in the length of the session in the count (i.e. if a user is at a workstation for a long time, do not count it as more than one workstation use). Exclude public use of computer workstations that can <u>only</u> be used to access the library catalogue (OPAC).

G1.3.2 Number of times electronic databases are accessed by library users:
Count the number of searches (or number of sessions if number of searches is not available) conducted in the online databases that are accessible at the library. If the library cannot provide this information enter zero. When you calculate this number:
- include vendor provided statistics on the total use of all databases licensed by the library for use by library users;
- include networked CD-*ROM databases and locally created databases (e.g. local newspaper indexes, local history collections or community information);
- count the use of a CD-ROM or other database title as one use;
- do not count each separate record accessed within the database; and

- use a typical week count for those items for which statistics are not provided by a vendor or counted automatically.

G1.3.3 Number of people using public library wireless connection
For libraries that offer wireless Internet connection to enable public use of personal or library- owned laptops on library property, count the number of people who used the wireless connection during the typical week. Use your wireless router's log report or appropriate software to obtain this number. If your library does not have a log report or appropriate software available, do a manual head-count. To clarify, include the number of people within the library building and if possible, the number of people accessing the library's wireless connection on the library's grounds or property. *Count the number of 'unique connections' to the library's wi-fi.

G1.3.4 Report the number of people using Maker Spaces, Digital Media labs, Self-publishing centres:
Count the number of people who use Maker Spaces, mobile Maker Space, Digital Media labs, Digital Learning Centre, Self-publishing centres, Green Screen, Recording Studio etc. in the library, either from sign-up sheets or software, or by a manual count.
G1.4 Reference, Information Provision and Instruction (typical week data)

G1.4.1 Number of standard reference transactions (criteria):
A standard reference transaction is a request for information made directly by a library user that involves the knowledge, use, recommendation, interpretation or instruction in the use of one or more information sources or bibliographic tools by library staff. (examples of reference questions include:
'How can I find out when Andrew Wyeth was born?' or 'Can you help me to locate information on the Internet about skiing in Ontario?') Standard reference transactions include reference requests library users make in person, on the phone, by regular mail (i.e. not e-mail) or by FAX. Information sources include print and non-print materials, electronic databases, catalogues and referrals to sources outside the library. If a request is referred to another branch, only the branch where the original request was made should count the reference request. If a library user has multiple questions, record each question as a separate transaction if it deals with a new subject.

Include:
Requests for help finding information on an electronic database or in the catalogue (other than simple checks of the library catalogue for a specific title),
- questions of fact or finding facts,
- literature searches,
- requests for information and referral,
- actual database searches, and
- requests received in person, by telephone, mail, or fax.

Exclude:
- Requests for directions, information on locations, (e.g. 'Is the library open Thursday nights?'),
- interlibrary loan requests,

- questions about rules or policies, (e.g. 'What is the loan period for videotapes?')
- requests for assistance about the use of the library and its services (i.e. library policy, procedures, services, programs, equipment, and facilities),
- shelf checks and simple checks of the library catalogue for specific items, and
- advertisements, bills, personal telephone calls, public notices or solicitations received by library staff

G1.4.2 Number of electronic reference transactions: An electronic reference transaction is one which follows the same criteria as a standard reference request but is received via electronic means (e.g. via email or web page or social media).

G1.4.3 Number of Reader's Advisory transactions: A Reader's Advisory transaction is a request for information made directly by a library user for the purpose of obtaining recommendations, guidance or specific materials relating to a library user's choice of reading material which focuses on a genre, topic or link between the library user's interests and the expansion of their literary interests.

G1.4.4 Number of Information Communication Technology, software and social media support requests: An information communications technology, software and social media support request is a request for information made directly by a library user for the purpose of obtaining information or help on information Communication Technology, software and social media. Examples include requests for help or information on E-book readers and their applications, blogs, social media such as Twitter or Facebook, computer software, and the Internet.

G1.4.5 Average staff time in minutes per Information Communication Technology, software and social media support request: Record the average time in minutes it takes staff to respond to user inquiries or need for orientation on Information Communication Technology, software, social media, computers or the Internet. An example would be time spent to orient a library user to an E-book reader or any of its applications or content. To assist your library to record this, try to record some times in minutes taken for these questions and average them, or provide best estimates based on staff experience. This is the only field in Section G that does not report a week's data. It reports an average time in minutes.

G1.4.6 Number of times accessible material, equipment or devices are requested:
A purpose of this question is to measure some of the accessibility assistance people receive at the library that meets the intent and spirit of the Accessibility for Ontarians with Disabilities Act, (AODA). Count the number of times that staff provides accessible material, equipment or devices to members of the public requesting them because of their accessibility features. Include in-person, phoned or emailed requests for accessible format material of any kind, including through inter library loan. Include the number of times staff retrieve material within the library to meet accessibility needs. This can include material acquired through CNIB or CELA or NNELS initiatives assisted by any library level data provided from those initiatives.

Accessibility devices equipment or furniture include but are not limited to magnification devices, large print screens on computers, audio book and Braille readers, or adjustable chairs and desks. If a member of the public seeks more than one accessible material item or accessible equipment

item during the same request to staff, count it as one request.

Staff can use best estimates for counting such items as audio books where one member of the public may borrow an audio book for accessibility purposes but where another member of the public without accessibility needs may borrow an audio book to simply listen to.

Public libraries with an ILS may be able to derive an average weekly statistic to address this question with information from their ILS. An example is the number of times people borrow Daisy readers or CELA, CNIB or NNELS material. If your library uses software like 'Userful' for its public access computers count the number of times people use large print capability of computers.

G1.5 Library Visits (typical week data)

G1.5.1 Number of visits made to the library in person: State the number of people entering the library for whatever purpose.
- count people as they are entering and re-entering the library,
- include people attending programs or making use of community meeting rooms, and
- exclude staff and service personnel.

G1.5.2 Number of electronic visits (user sessions) to the library website: If your library has a website, state the number of visits made to it. Use electronic counting software (e.g. Google Analytics) to generate this figure. This can include visits through the library website to the library catalogue if separate from the website or to the library's digital collections or digital local history collections. Include visits from both inside and outside the library.

G1.5.3 Number of social media visits: If your library participates in social media, state the number of visits made to your library's social media such as blogs, Facebook and Flickr. Include visits from both inside and outside the library. This can include Twitter Retweets, replies and favorites, Facebook likes, shares and comments, Google+ "+1"s, shares and comments, LinkedIn connections and Pinterest pins and repins.

Comment Box
Please use this box to highlight significant changes to Section F or G including typical week data, the types of requests received by your library staff, or on library usage.

Click **Save** to save all the data in Section F
and G. Click **Next** to go to the next form.

Section H – Partnerships and Initiatives

H1.1 Consortia and Co-operative Purchasing**:** Report on any active consortia and cooperative initiatives that your library participates in. Include initiatives led or administered by Ontario Library Service Agencies such as for e-resources, databases and Integrated Library Systems. Select from the drop-down list to identify those categories

relevant to your library and identify specific consortia further by name. There is also an option to add additional consortia types and identify them by name. The drop-down categories are:

- Books
- E-books
- Databases and other downloadable services (such as music or other digital content)
- Computer software
- Connectivity
- Integrated Library Systems (ILS)
- Corporate discount programs (e.g. office supplies with an office retailer or library vendor)
- Municipal and Local government services
- Other

H1.1.2 – Reciprocal borrowing agreements, and policies where there are no non-resident user fees

H1.1.2 – In the write-in field provided please list libraries with which your library has a reciprocal borrowing agreement(s) in place that recognizes each library's membership card. Please also briefly describe your written policy that addresses this. These agreements do not involve any charges to the other library or its patrons, but rather are agreements to provide library services to another library's residents free of charge and without an annual contract fee. This includes for neighbouring libraries and may involve many libraries in a specific region or geographical area. Information provided can include overall policies for no non-resident user fee. Information can address provision of free library services beyond the library's geographic area, such as for First Nation or Indigenous people or communities.   Information can also address policies for reciprocal borrowing between a public library and academic library, by a public library for college or university students who live in residence during the academic term within the library's community, or for school age children who may attend school in a library's community but who live outside of a library's geographic borders.

This section is not intended to address public libraries that have an annual paid contract in place with a neighbouring municipality, First Nation or Local Services Board. However, a library can address highlights of their contractual agreement, policy or philosophy if they wish.

H1.1.3 – Accessibility Initiatives

H1.1.3.1 Accessibility-specific equipment: In the write-in field provided please list all of the accessibility-specific equipment that you provide to patrons at your library. These can include equipment such as Daisy readers, braille readers, special workstations, tablets or readers set aside for accessibility purposes, or other accessibility-specific equipment and furniture.   You can provide information on type of equipment e.g ." Daisy readers" and include numbers if you have them e.g. "7 Daisy Readers".

H1.1.3.2 Accessibility training for staff that was delivered in the reporting year: In the write-in field provided please list all accessibility-related training that you offered to library staff during the reporting year for this survey. This can include sensitivity or 'active offer' training, training to assist people with a specific type of disability, and training on specific accessibility devices and technologies.

H1.1.3.3 Accessibility accomplishments: In the write-in field provided please describe your accessibility accomplishments during this survey year. These can include physical improvements to the library itself, the creation of new programing for patrons, or any updates to accessibility policies or procedures at the library.

H1.1.3.4 Active library participation in CELA and / or NNELS: In the write-in field provided please describe the level and nature of your patron engagement, and use of services such as CELA (Centre for Equitable Library Access), and/or NNELS (National Network for Equitable Library Service). If your library does not use either service, please provide reasons for not participating.

H1.1.3.5 Ongoing accessibility collections and services: In the write-in field provided please describe the nature of your library system's accessible collections and accessibility services. For example, what is the current status of your collection, and what are you goals for the collection in the near future?   What are some ongoing accessibility services your library provides?

H1.2 Friends of the Library and Foundations**:** Report on whether your library is associated with any active Friends or Foundation organizations, or other charitable groups. If you reply "yes," you must report the number of organizations your library is involved with.

H1.3 Social Media**:** Report on whether your library makes use of and participates in social media. If you reply "yes", please identify, from the drop-down list, the categories of social media that your library engages in. There is also an option to add social media categories. The drop-down categories are:
- Blogs
- Facebook
- Flickr
- Google+
- Instagram
- LinkedIn
- Pinterest
- RSS Feeds
- Tumblr
- Twitter
- LinkedIn
- YouTube
- Other Social Media (Add new categories as needed for additional social media your library participates in.)

H1.4 Cultural Partnerships and activities**:** Report on whether your library has any active partnerships. If you reply "yes", report the number of partnerships your library has. Using the drop-down menu list, identify the categories of cultural partnerships your library has. There is also an option to add cultural partnership categories. The drop-down categories are:
- Community Museums
- Art galleries
- Municipal cultural planning partnerships
- Archives
- Heritage Organizations
- Ethno-cultural and Newcomer Service Organizations
- Other

H1.5 Education Sector Partnerships**:** Report on whether your library as any active education sector partnerships. If you reply "yes", report the number of partnerships your library has. Use the drop-down list to identify categories of education sector partnerships that your library has. There is also an option to add education partnership categories. The drop-down categories are:
- Early childhood organizations
- School boards, including local schools and local education authorities
- Community colleges
- Universities
- Distance education
Other

H1.5.4 New Write-in Field

Please provide highlights or examples of your library's partnerships with the Education sector.

H1.6 Significant achievements: Please list any special achievements for your library in the past Survey year in the field provided (e.g. updated library integrated system implemented, networking, new programs provided, fundraising initiatives, new library building opened, renovation complete, new partnership created, municipal cultural plan completed, 3-D printer and their numbers in service, digital service centres or labs, maker spaces, other achievements that have a positive impact on the community your library serves, etc.)   Please provide information on other partnerships the library has that are not covered elsewhere in Section H. The information you provide can be at the branch or library system level and will help the Ministry to understand the accomplishments of public libraries in Ontario.

H1.7 Government Services: Answer 'Yes' or 'No' as applicable and select all active government services partnerships that apply from the drop-down menu. Add new lines as needed.
- Service Ontario
- Human Resources and Skills Development Canada (HRSDC)
- Municipal services (e.g. licences)
- Health (e.g. health information services in partnership with any level of government)

H1.7.3 Government Services Partnerships

Government services partnerships include any programs or partnerships with any level of government (municipal, provincial, or federal) in which the public library provides access to government services or information to its patrons. Use the write-in field to describe which governments the library partners with, and the extent of the partnership and activities.

H1.8 Capital Projects

H1.8.1 Select 'Yes' or 'No' to indicate whether your library has any capital project plans.

H1.8.2 In the fields provided, please indicate the name of the project, the year commencing, square footage (if applicable) and the total project cost (or nearest estimate).
- Projects should be shovel ready at the present or, shovel ready in the next 2 years from the time of filling out this survey.

H1.8.2.1 In the fields provided, please describe your future, not-yet-funded, capital plans if you have any. These are project that are planned beyond project described in the next two years in fields H1.8.1 and H1.8.2 above. Please provide any information you have. Estimates are also acceptable.

H1.8.3 Does your library currently have any immediate technology needs (within 2 years)?
Note: You must select either the 'Yes' or 'No' radio button.
Yes
No

H1.8.4 If answering Yes in H1.8.3, please outline your library's technology needs (hardware and software, within 2 years) in the fields: Technology Need - Total Project Cost .   These fields are a write in field to describe each of your library's technology needs for the next two years, plus a cost field for known or estimated cost.   Group same technology items together, e.g. "public access computers".   Use as many lines as necessary.

H1.9 Business and Economic Sector Partnerships:
H1.9.1 Select "Yes" or "No" to indicate whether your library has any partnerships with the business and economic sector.
H1.9.2 If yes, select from the drop-down menu and add new lines as applicable.

If not on the drop-down list, add to Other Business and Economic Sector Partnerships field

H1.9.3 Business and Economic Sector Partnerships

Business and economic sector partnerships include any programs or partnerships with a for-profit or not-for-profit business or economic sector organization in which the public library provides access to related information to its patrons (examples: small business collections or a small business seminar given in the library). Use the write-in field to describe groups the library partners with, and the extent of the partnership and activities.

H2.0 Measuring the results of Library Services:

H2.1 Measuring the Results of Library Services

Please provide information if you measure the results, impact and outcomes of your library services including library programs. This includes if you record outcome information as a result of performance measurement evaluation. What do you measure? What are some highlights of results? How does your library do the measurement? Information can be at a branch or library system level. We would also like to know if you have upcoming plans to do such measurements.

An example of outcomes might be if a library provides early literacy programing and six months later it approaches parents or care-givers to learn of the success or impact of the programming on participant children literacy skills. Have children's literacy skills increased and do parents or care-givers credit the library program for that? Another example might be if the library provides a job application and interview skills training program, and one year later surveys participants to learn who managed to secure a new job and if they credit the library's program for their successful job search.

Further examples include if the library has measured the economic impact of its services, the social impact of its services, or technology at the library and its impact assisting the public and community.

It is important to note that measuring outcomes is different from post-program participant evaluation, such as inquiring if participants enjoyed a library program, would take it again or recommend it to others. It is also not measuring outputs, such as the number of library program attendees.

Comment Box
Please use this box to expand on any of the items in this section or to outline something that was not covered but is of relevance to this section.
Click **Save** to save all the data in Section H.
Click **Next** to go to the next form.

Section I – Certification

The Certification form first displays the status for each section of the survey.

Ensure that each section of the Annual Survey indicates 'Complete' in the 'Status' column. If not complete, go back to the form(s) requiring additional information.

Once all sections are complete, click on the '*Certification*' link. Follow the instructions provided on the form. Print and keep a signed copy for your records.

Printing the report
You can also print or save a PDF copy of the entire report from the Certification page at any time.

1) Click on View/Print report.

2) The report will be generated in HTML and open in a new window. You can scroll through the report to ensure that it is complete, print it or save to a PDF file that can be saved for your records or sent for review.

3) Click on "Print" to send to a printer.
4) Click on "Save Report as PDF" to create a file that can be stored on your hard drive.

Note: To print a blank survey form to help collect information before inputting the data into LibStats, you can enter data in Section A, General Information; data field A1.14 "No. of Active Cardholders". That will activate the survey. You can then go straight to the Certification page and print off a blank survey for your library's use.

Blank Certification Form

Complete this form, print and save a hard copy of this form with a copy of your data submission.

This annual report is filed by the undersigned pursuant to the *Public Libraries Act*, R.S.O. 1990, C.P. 44 for the fiscal year:

D Fiscal Year, April 1 to March 31 *or* October 1 to September 30 _____-_____
   (years)

D Calendar Year, January I to December 31 _____
   (year)

Legal Name of Public Library, Municipality, Local Services Board or First Nation Band:
_____

The Public Library Board, Municipality, Local Services Board or First Nation Band during the reporting period herewith, accepts the above report, certifies its essential accuracy and transmits it to the Ministry of Tourism, Culture and Sport in accordance with the above statute and consents to the release of the information contained in the report pursuant to the subsection 17(3) of the *Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, chapter F.31, as amended.

	Second signature if locally required:
Print Name of Chief Executive Officer	Print Name of Chief Executive Officer
and Chair Person or Authorized Official	and Chair Person or Authorized Official
_____	_____

Signature of Chief Executive Officer	Signature of Chief Executive Officer
and Chair Person or Authorized Official	and Chair Person or Authorized Official
_____	_____

Date_____   Date_____

Please ensure that you retain a copy of the survey that you e-filed and a signed copy of the certification in your records for audit purposes, as the e-filed survey if not a signed document.
Print this certification, complete and have it signed and attach it to your e-filed survey. Do not return this acknowledgement and certification to the Ministry.

Signing off a data submission

Once all of the data has been entered online and certified, the submission is ready to be signed off by the library user. After the library has signed-off, the submission data will be:
- "locked" (it can be re-opened later if necessary)
- reviewed by the Ministry
- signed off by the Ministry

To begin the sign-off process, point at the Data Collection menu and select "*Sign-off Public Libraries Data Submission by the Library or Contracting Organization*".

The LibStats application will execute a number of business rules to validate the data. **Note**: This is different than data entry errors which must be corrected immediately.

Your library name will be displayed in the "organization" field. In this example a "Public Library" is used but the process is the same for a "Contracting Organization". **Note**: *Users may only sign off a submission for their own organization.*

A list of all submissions for the library will display including submissions from previous years. The last activity for the submission will also be displayed. Select the open submission for the current year to begin the sign-off process.

Select: **Data Collection Menu**

Select: **Sign Off**

Warnings and errors will be displayed.

If errors are found, they must be fixed before you can proceed.

Warnings may or may not require changes.

If no errors or warnings are found, or if you wish to override a warning click on "**Sign-off"** to proceed.

If no warnings are found or if you wish to override a warning, proceed to "**Confirm Sign-off**". If you want to fix any warnings, click on **Cancel Sign-off** and then make the required changes.

An email will also be sent to the user who requested the sign-off. The email contains a link to the validation report.

Fixing errors and warnings

Critical errors must be fixed before the sign-off process can be confirmed. To do so,
1. Print the page as a reference
2. Cancel sign-off
3. Return to the submission
4. Fix the errors on the corresponding forms
5. Start the sign-off process again. If errors persist, try again.

Warnings will not prevent the submission from being signed off. To correct any warnings, follow the steps for "critical errors" above.

*Note: You cannot cancel sign-off after clicking 'Confirm Sign-off'. If you notice that you have incorrect data after sign-off, contact Ministry staff who will return your submission to you for data correction. Once data is corrected, then repeat the sign-off process.

Cancelling Sign-Off

If at any time after signing-off the user would like to add or edit information, the sign-off can be cancelled by clicking on "**Cancel Sign-off**". However, this must be done before "Confirm Sign-off" has been clicked.

User will be returned to the sign-off form and will see the message "*Sign-off has been cancelled*".

The sign-off button will be displayed again to enable sign off once the changes have been made to the data.

Important note: If the submission is signed off but then cancelled in order to make changes to the data, the user must run the sign-off process again.

Completing Sign Off on data collection
Click on "Confirm Sign Off"

Frequently Asked Questions / Troubleshooting

Q1 – **Browsers** - What Internet browsers can be used with LibStats?
A. LibStats has been carefully tested using Microsoft Internet Explorer. Use the most current version of Internet Explorer that your personal computer can support. We cannot guarantee that other browsers will display information correctly.

Q2 – **User Accounts** - I am a new LibStats user. I received two emails from the Ministry informing me that I could sign in. However, I was not successful.
A. Please check the flow chart on Page 10 for first-time log in instructions. Notwithstanding the wording in the emails, you must wait for at least two hours after receiving the third email before attempting to log in for the first time.

Q3 – **User Accounts** - Do I need to apply for a user name every year?
No. Ensure that you retain your Go Secure User Name so that you can fill out and submit your Annual Survey next year. Passwords do not expire.

Q4 – **User Accounts** - If a new person assumes the role of CEO, can they complete the survey using my account?
A. No. The new CEO will need to request their own account. A new user name and password will be issued.

Q5 – **Logging in** - I am unable to log in to the LibStats application. What should I do?
A. From time to time there are system upgrades (usually after business hours) or unexpected problems. Please wait a couple of hours and then try again. If the problem persists for more than a day, please notify Ministry staff.

Q6. –**Administration** - Our librarian retired and we have hired a new librarian. I changed the name in Administration but it is not reflected in the data submission.
A. Please note any changes in the Comments box at the bottom of section A. Alternatively, notify Ministry staff by e-mail and the changes will be made for you.

Q7 – **Section B** - If I have indicated a surplus or deficit net balance forward from previous year, where do I report this?
A. You must save the amount in Section B1.1.

Q8 – **Section B** - I'm having problems saving financial information in Section B (Financial).
A. If you are having trouble saving Section B of the Annual Survey, please go through and remove any zeros that you have inserted in fields for which you have no data. Leave those fields blank.

Q9 – **Saving data** - I'm having problems saving a section of the Annual Survey. What's wrong?
A. If you're unable to save a particular section of the Annual Survey, look for 'Error' or 'Warning' messages at the top of the page. These will indicate which field is causing a

problem. You should also look for red exclamation marks beside all of the fields as these also indicate an error. If you find a red exclamation mark, hover your cursor over it and a pop-up explanation will appear.

Q10 – **Errors** - How can I create a screen shot?

A. Simultaneously press the Control and 'Print Screen' button on your keyboard and then click paste in the body of an e-mail. (You can also paste by simultaneously pressing Control and the "v" key on your keyboard.) You can then forward the screen shot to the Ministry.

Q11 – **Sign-off** - Why is the Sign-off button not available?

A. If you do not see a 'Sign-off' button on the data collection menu, your permissions may need to be updated. Please notify Ministry staff and allow up to 5 days for the changes to take effect.

Q12 – **Data Correction** - How can I make corrections to data once I've already submitted the Annual Survey?

A. If you need to make changes to the data you have signed off, please notify Ministry staff who will re-open your submission for you. Make all necessary changes, re-submit your Annual Survey and sign off again. Alternatively, by exchanging email with Ministry staff to clarify the data in question, Ministry staff may make corrections for you.

Q13 – **Printing** - How can I print the entire survey once I've completed it?

A. In order to print your survey so you have a copy for your records, click the "View/Print Report" button at the bottom of Section I – the Certification form. First you will generate the report and then you can send it to print.

Q14 – **Printing** - How can I print a blank copy of the survey?

A. If you wish to print a blank Annual Survey form to help gather data before inputting to the LibStats survey, you can enter data in Section A, General Information; field A1.14 "No. of Active Cardholders". That will activate the survey. From there,
a) Go straight to the Certification page
b) Click on View / Print Report from the bottom right of the page
c) Select "Print" and a blank report can be sent to your printer.

Q15 – **How do I get a hard copy of the "Certification" form?**

A. Go to the Section I and click 'Certification'. This will bring up the PDF document ('Certification') that you can print and sign for your records. After this, close the PDF.

Q16 – **Why isn't data that I've changed displaying?**

On rare occasions your saved data may not appear in the system until the following day because of a delay. Check back every couple of hours before attempting to re-enter the data.