

Tennessee Public Library Survey Library Data Collection

FY July 1, 2002 - June 30, 2003

Part I: General

If boxed information is correct, there is no need to re-enter that data.

Indicate only Updates/Changes here:

1. Director's Last Name:

1.

2. Director's First Name:

2.

3. Library's Official (Legal)

3.

4. Mailing

4.

-

5. Street

5.

-

6. Phone Number:

6.

(2nd Phone Number, if any)

7. Director's FAX Number

7.

8. Director's Email

8.

9. Library Webpage URL, if any:

9.

10. County:

11. Region:

12. Official Service Area Population

for Full Service libraries meeting at least Level 1, Minimum
All others are "Community Libraries" with no population

(obtain number from
2002-2003 county contract)

2001-2002

2002-2003

12.

13. Accessible Hours:

Def: hours library is open to the public.

(please calculate,
averaging all summer
and winter hours):

13.

- | | |
|--|----|
| a. # hours/wk open after 5, adding all days Mon | a. |
| b. # hours/wk open Saturdays: | b. |
| c. # hours/wk open Sundays: | c. |

Questions? Contact your Regional Data Coordinator or Shelley Fugitt, State Data
615-532-4601 Shelley.Fugitt@state.tn.us.

revised 6/03/03

Page 1

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03)_____ **Library****Part I – General Information (Continued)**

14. When data is submitted to the Federal State Cooperative Service, there are often questions about numbers that change greatly from year to year, and/or about numbers that have an abnormal relationship to other figures as calculated by ratios. Rather than asking the library director to explain such changes or unusual relationships long after the fact, this checklist will be used to record any situation that may account for unusual comparisons.

Please check any that apply. Also, for any that are checked: please comment/give details

☐ Library closed part of the year	_____
☐ New building/being planned/under construction	_____
☐ Collection extensively weeded	_____
☐ Substantial addition to collection	_____
☐ Automated circulation procedures implemented this year	_____
☐ Substituting Internet for other resources	_____
☐ Special grants or gifts	_____
☐ Appropriations increased more than 10%	_____
☐ Grants or donation income not spent by end of fiscal year	_____
☐ Personnel (“librarians”) reclassified	_____
☐ Increased staffing	_____
☐ Salary/benefits changed	_____
☐ New programming	_____
☐ New method(s) of collecting, counting data	_____
☐ Records incomplete	_____
_____	_____

**14a. What type of legally established governance does your library have?
Please choose all below which describe your situation:**

☐ Governed by a city or town library board

☐ Governed by a county library board

☐ Governed by both a county and a city/town board

☐ Governed by a privately organized and appointed board

Governing board meets

☐ monthly

☐ every 2 months

☐ quarterly

☐ as needed

☐ Library Director attends board meetings

Revised 6/03/03

Page 1a

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03) _____ **Library**
Part I – General Information (Continued)
Library Structure (answer Items 15a and 16a **OR** Items 15b and 16b)

15a. Independent Library _____ proceed to Item 16A	Def: single library reporting directly to a library board	15b. Library System _____ proceed to Item 16B (The combined totals for both main and branch libraries should be entered in the remaining sections of this survey.)	Def: a main library with one or more branch libraries; entire system reports to a single board
16a If Independent, not a branch, is the library considered a Full-Service Library? ____ Yes ____ No	Yes: library has been declared a Full-Service library by the regional and/or state library because it generally meets or exceeds the Minimum Standards for at least a Level I library. No: library has not been declared Full Service, and is thus considered Community Library	16b. # branches _____	Def: Branch libraries are library outlets which have all of the following: 1) Separate quarters; 2) permanent paid staff; 3) organized permanent basic collection of books; 4) regularly scheduled hours open to the public; 5) administered by the central or main library and 6) do not report directly to a board

17. Total number of registered borrowers. Report the number of people who have applied for and received borrowing privileges from your library. Do not include non-residents who pay for library privileges.

(Please estimate if no exact count. Check if number obtained by a count of records or estimate)

NOTE: these breakdowns are not in the same order as last year	#Adult Borrowers	Def: Adult borrowers are over 14 years of age	____ Records ____ Estimate	17a. _____
	#Juvenile Borrowers	Def: Juvenile borrowers are 14 years of age or under	____ Records ____ Estimate	17b. _____
	Total Borrowers (17a+17b):	Def: Total borrowers are sum of Adult + Juvenile Borrowers	MUST USE By Records	17c. _____
	# Senior Borrowers	Def: Senior borrowers are those Adult borrowers 65 years of age or older (already included in Adult count)	____ Records ____ Estimate	17d. _____

Part II – Library Staff

Hours Paid converted to Full-Time Equivalents (FTE's) - 40 hrs/week x 52 wks = 2080
hrs/yr = 1 FTE.

Report as of 6/30/03 and include unfilled positions if a search was underway at that time.

Hours paid to current employees or hours scheduled for unfilled, open positions in the following categories (Include paid vacation, sick or other leave):	Yearly hours for <u>all</u> employees in category:	Divide by 2080 to get FTE (Round to 2 decimal places)
18. Librarians with Master's Degree (MLS) from ALA accredited program of library and information studies	Hrs.	FTEs
19. Other employees holding the title of Librarian who do work that requires professional training and skill in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. This would include, but is not limited to, graduates of the state sponsored Public Library Management Institute and any others who hold the title of Librarian, Manager, Director, Administrator, Head Librarian	Hrs.	FTEs
20. Other paid library staff (<u>except</u> plant operations, security, custodial, and maintenance)	Hrs.	FTEs
21. All staff paid from the library budget that perform plant operations, security, custodial or maintenance work	Hrs.	FTEs
22. Total FTEs of Paid Staff (Add FTE Items 18 through 21)		FTEs
23. Total # Volunteers (not FTE): unpaid persons who have given time during the year for advisory board, storytellers, book sale, operations, fundraising, computer, and any other work. Count each person only once, even if multiple duties were performed.	_____ # Volunteers	
24. Do you have a paid Children's &/or Young Adult Services Librarian?	Yes _____ No _____	

Revised 6/03/03

Page 2

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03) _____ Library
Part III – Library Collection

Please refer to ending inventory on last year's report and use the **same figures** for beginning inventory on this year's

.	As of 7/1/02	# Added during yr.	# Deleted during yr.	As of 6/30/03	
25. Books, Bound Serials, Govt. Docs.:					Def: to include all: Books: non-periodical printed publication bound in hard or soft cover or in loose-leaf format; Bound Serials: publication issued in successive parts, usually at regular intervals intended to be continued indefinitely. Include bound periodicals (magazines), newspapers, annuals (reports, yearbooks, etc.), proceedings and transactions of societies. Gov't Documents: any publication in book, serial, or other form of library material that is published by a government agency, intergovernmental organizations to which governments belong and appoint representatives, such as the United Nations, Organization of American States, etc.
# Locally owned					
# Regionally owned					
26. Audio materials:					Def: material on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically or electronically, or both. Includes audio-cassettes, audio cartridges, audio discs, audio reels, talking books, audio kits including a book, other sound recordings
# Locally owned					
# Regionally owned					
27. Video materials:					Def: material on which pictures, sound, or both are recorded. Electronic playback reproduces pictures, sounds or both using a television receiver or monitor. This includes video kits that include a book.
# Locally owned					
# Regionally owned					

28. Microforms:					Def: a photographic reproduction of textual, tabular, or graphic material reduced in size so that it can normally be used only with magnification. The two main types of microforms are micro reproductions on transparent material, including roll microfilm aperture cards, microfiche, and ultra fiche, and reproductions on opaque material. Exclude current serial subscriptions. Count rolls of film. Estimate pieces of fiche..
# Locally owned					
# Regionally owned					
29. Films:					Def: (also “motion picture”): a length of film, with or without recorded sound, bearing a sequence of images that create the illusion of movement when projected in rapid succession (usually 18 or 24 frames per second). Motion pictures are produced in a variety of sizes: 8, 16, 35, 55, and 70mm & a variety of formats: cartridge, cassette, loop, reel).
# Locally owned					
# Regionally owned					
30. Other materials:					Def: Include all materials not already reported (except please do not report any current serial subscriptions or electronic materials here)
# Locally owned					
# Regionally owned					
31a. Total All Materials Locally Owned					Def: total of all (a.) rows of Locally owned lines 25a through 30a above
31b. Total All Materials Regionally Owned					Def: total of all (b.) rows of Regionally owned lines 25b through 30b above
32. Current Serial Subscriptions					Def: Report titles received, both subscription and gift. Do not report number of individual issues. (No electronic subscriptions or serials available electronically reported here) For systems, the total number of subscriptions, including duplicates, should be reported
# Locally owned subscriptions					
# Regionally owned subscriptions					

Revised 6/03/03

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03) _____ **Library****Part IV – Library Service**

33. Service hours: Take a typical workweek from Sunday through Saturday in which the library is open its regular hours, containing no holidays. Multiply the total service hours of that week by 52 for the annual service hours. 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. For Systems: Using the above method, identify annual service hours for each branch and bookmobile and add to main library's annual service hours total. This new total reflects all service hours in the system. (See Part XI, page 9)	# Service Hours:
34. Annual attendance in library: If an actual count of visits is not available, count the total number of persons entering the library per typical week including persons attending activities, meetings, and persons requiring no staff services. Multiply this figure by 52 to get annual attendance. For Systems: Include attendance at main library, branches and bookmobiles. (See Part XI, page 9)	#Attendance:
35. Annual reference transactions completed: If an actual count of reference transactions is not available, count the total reference transactions per typical week and multiply this figure by 52 to get annual transactions. A reference transaction is an information contact which involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The term includes information and referral service. Information sources include printed and non-printed materials, machine-readable databases (including computer-assisted instruction), catalogs and other holdings records, and through communication or referral, other libraries and institutions and persons both inside and outside the library. When a staff member utilizes information gained from previous use of information sources to answer a question, report as a reference transaction even if the source is not consulted again during this transaction. The request may come in person, by phone, by fax, mail, or by electronic mail from an adult, a young adult, or a child. NOTE: It is essential that libraries do not include directional transactions in the report of reference transactions. A directional transaction is an information contact which facilitates the use of the library in which the contact occurs and which does NOT involve the knowledge, use, recommendation, interpretation, or instruction in the use of any information sources other than those which describe that library, such as schedules, floor plans, handbooks, and	# Reference Transactions:

policy statements. Examples of directional transactions include giving instruction or locating, within the library, staff, library users, or physical features, etc., and giving assistance of a non-bibliographic nature with machines. For Systems: include reference transactions at main library, branches and bookmobiles		
36. Annual circulation transactions: the lending of library materials to registered library borrowers for a specified period of time and under clearly identified rules and regulations. This activity includes charging, either manually or electronically, and also renewals, each of which is reported as a circulation transaction. Do not count in-house use of library materials. For juvenile circulation count the total annual circulation of all children's materials in all formats to all users. (If records by age are not kept, use estimates based on percentages of typical week. Indicate if records or estimates are used) Suggestion: use monthly figures previously sent to region, so these numbers agree. For Systems: include circulation at main library, branches and bookmobiles (See Part XI, page 9).	___Records ___Estimate	a. # Adult Circulation:
	___Records ___Estimate	b. # Juvenile Circulation:
	MUST USE # by count	c. # Total Circulation:
37. Total number of programs/presentations made to groups: An information contact planned in advance in which a staff member or person invited by a staff member provides information intended for a number of persons. Information service to groups may be either bibliographic instruction or library use presentations, or it may be cultural, recreational, or educational programs or presentations. Programs or presentations both on and off the library premises are included, as long as the library sponsors them. Does not include meetings sponsored by other groups using library meeting rooms. For Systems: include total at main library, branches and bookmobiles.	a. # Adult Programs:	
	b. # Juvenile Programs:	
	c. # Total Programs:	
38. Total attendance at programs/presentations: Headcount at programs counted above. Total attendance at children's programs includes any adults attending children's program. For Systems: include total at main library, branches and bookmobiles.	a. # Adult Program Attendance:	
	b. # Juvenile Program Attendance:	
	c. # Total Program Attendance:	
39. Total number of children participating in <u>2002</u> Summer Reading Program: Use figures from summer of 2002, <i>not</i> 2003. For Systems: include total at main library, branches and bookmobiles	a. # Listeners Enrolled:	
	b. # Readers Enrolled:	
	c. Total SRP Enrollment:	

Revised 6/03/03

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03)_____ **Library**
Part V – Resource Sharing

Interlibrary Loans: An item of library material, or a copy of the material, made available by one library to another upon request. It includes both the lending and borrowing. The libraries involved in interlibrary loan are NOT under the same library administration (i.e. not affiliated branches) For Systems: Report total of loans going to or coming from libraries outside the system (not within system).	40. Interlibrary loans as borrower: actual items received from other libraries and from Tennessee Resource Center	#
	41. Interlibrary loans as lender: actual items provided to other libraries	#

42. Reciprocal Borrowing Agreements: Reciprocal borrowing is a program in which libraries mutually agree to circulate materials to the patrons who hold a valid library card from other libraries participating in the program. Reciprocal borrowing allows walk-in library users to check out materials free of charge from any participating library. In Tennessee, the Tennessee Library Card (TLC) program is a statewide reciprocal borrowing program available to public libraries and their users.	a. Does your library participate in the Tennessee Library Card (TLC) Program?	Yes____ No____
	b. Does your library have reciprocal borrowing agreements with other libraries?	Yes____ No____
	c. If yes, which libraries?	

Part VI – Facility

43a. Total number of square feet in library facility: Report the total number of square feet being used for library purposes. For Systems: Report total of square feet of main library and branches. (See Part XI, page 9)	Ft.	Sq.
--	-----	-----

43b. Total number of bookmobiles: A bookmobile must meet all of the following: 1. A truck or van that carries an organized collection of library materials; 2. Paid staff; 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.	
---	--

Part VII – Miscellaneous Information

44. Do you have a Friend's organization?	Yes___	No___
If "Yes" please provide the following information:		

Number of members		
Date officers change		
President's First Name		
President's Last Name		
President's Street Address		
City		
Zip		
Telephone Number		
Is your Friends designated as a 501-c-3 for receiving deductible donations?	Yes___	No___

45a. Does your library have an organized foundation for fund-raising, separate from your Library Board?	Yes___	No___
45b. Is your Foundation designated as a 501-c-3 for receiving deductible donations?	Yes___	No___

Revised 6/03/03

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03) _____ **Library**
Part VIII – Electronic Technology

46a. Do you have an automated circulation system?	Yes_____ No_____
If yes, which system?	
46b. Do you have an automated system to produce MARC (machine-readable cataloging) records?	Yes_____ No_____
If yes, which system?	
46c. Do you have an automated acquisition system?	Yes_____ No_____
If yes, which system?	

47. Operating Expenditures for Library Materials in Electronic Format: 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 US 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. (Also include in #65D on page 8, Other Formats)	\$
48. Operating Expenditures for Electronic Access: Report all operating expenditures from the library budget associated with access to electronic materials and services. Include computer hardware and software used to support library operations, whether purchased or leased, mainframe and 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 expenditures 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. (Also include in #66 on page 8, All Other Operating Expenses) Do NOT report any capital expenditures here.	\$
49. Number of Library Materials in Electronic Format: Report the number of physical units such as CD-ROMs, diskettes, etc., that are designed to be processed by a computer. Examples are government documents, reference tools or serials distributed on CD-ROM or other portable digital carrier, locally mounted databases, diskettes or magnetic tapes. Exclude bibliographic records used to manage the collection, library system software, and microcomputer software used only by the library staff.	#

50. Does your library provide access to electronic services? (e.g. bibliographic and full-text databases, multi-media products) Provided due to subscription, lease, license, consortia membership or agreement. Include full-text serial subscriptions and electronic databases received by the library or an organization associated with the library.	Yes_____ No_____
51. Does your public library have access to the Internet? Report the library as providing Internet access only if one or more of the following services are accessible: telnet, gopher, file transfer protocol, or community network. Do not report "yes" if the library has access to electronic mail only.	Yes_____ No_____
If "yes" to Internet access, answer questions 53 and 54. If "no", then go to p.7	

--

53a. Number of Computers with Internet access which are used by Staff Only	#
53b. Number of Computers with Internet access used by General Public	#
53c. Number of users of electronic resources in a typical week. Include users of Internet (WWW, email, telnet, other), online indexes, CD-ROM reference sources, software, online catalog. Do Not include staff use of these resources. Number may be counted manually, using registration logs. Count each user that uses electronic resources, regardless of the amount of time spent on the computer. One user in three times during the week counts as three customers. Software such as "historian" can also be used to track the number of users at each terminal.	#
54. Is your library part of a consortium? part of a group of libraries with different governing bodies that share electronic resources through a contractual or other formal agreement, not including service from a regional library or provided by the state. May include academic, special and school libraries.	Yes_____ No_____
If yes, with whom?	

Revised 6/03/03

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03) _____ **Library**
Part IX– Library Income by Source

Financial Report (Pages 7 and 8) to be completed by the Board Treasurer or Bookkeeper.

Do not include the value of any contributed or in-kind services or the value of gifts, donations, fines and fees in appropriations.

55. Amount appropriated by county for operating expenses: All tax and non-taxed receipts allocated by the county available for expenditure by the public library. Do not include appropriations for one-time expenses of capital items. (see item 58)	\$	*
--	----	---

56. Amount appropriated by city or town for operating expenses: All tax and non-taxed receipts allocated by the community/city available for expenditure by the public library. If more than one city appropriates money to support the library, please report the appropriation of each. Do not include appropriations for capital items or other one-time expenditures (see Item 58)		
56a City_____	\$	
56b City_____	\$	
56c City_____	\$	
56d City_____	\$	
56e City_____	\$	
56f City_____	\$	
56g Total All Cities (Add 56A through 56F)	\$	*

57. Total Operating Appropriations (all public funds) Add together * above (55 + 56g) Do not include gifts, donations, fees or fines. These are reported in Item 60. The result is the appropriation your library received from local government during the fiscal year. This figure is important for Maintenance of Effort (M.O.E.) calculations.	*	\$
--	---	----

58. Total City/county appropriation for one-time expenses or capital items: Report all city or county monies that are appropriated for special projects or capital	\$
--	----

improvement here. (These funds are <u>not</u> included when determining if the library meets Maintenance of Effort requirements.)	
---	--

59. LSTA funds: Report any LSTA funds received from the State Library and Archives. This includes direct service grants, and all other LSTA allocations. (These funds are <u>not</u> included when determining if the library meets Maintenance of Effort requirements.)	\$ **
--	-------

Other Income: (These funds are not included when determining if the library meets Maintenance of Effort requirements.) Report all other income not reported in Items 57, 58, and 59 above. Include monetary gifts and donations, interest, fines, and fees. Do not include the value of any contributed services or the value of any non-monetary gifts and donations.

60a.	Fines and Fees:	\$
60b.	Interest Earned:	\$
60c.	Private Donations, gifts, memorials:	\$
60d.	Grants not listed in #59 above_____:	\$
60e.	Other_____:	\$
60f.	Other_____:	\$
60g.	Total (Add 60A through 60F):	\$ **

61. Total other income (not appropriations, not capital): (Add together ** above, #59 + #60g)	**\$
--	------

Revised 6/03/03

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03) _____ **Library**
Part X– Library Expenditures by Type
Section A – Operating Expenditures:

Operating expenditures are the current and recurrent costs necessary to support the provision of library services. Significant costs, especially benefits and salaries, that are paid by other taxing agencies (government agencies with the authority to levy taxes) “on behalf of” the library may be included if the information is available to the library. Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Estimated costs are not included.

NOTE: Three columns are being provided to record expenses: Column I is for those paid from funds obtained through appropriations (used in testing for Maintenance of Effort). Column II “From Other Income”.is for non-capital expenses paid from any source except appropriations. Column II includes expenditures of memorials, gift funds and grant funds or one-time expenditures from fines and fees. Column III is the sum of Column I plus Column II.

The totals in line 67 will probably closely resemble the figures from the Income section. Total Operating Appropriations Page 7 #57 will be similar to line 67 Column A on this page. Total Other Income Page 7 # 61 will be similar to line 67 Column B on this page. Although similar, the figures will not necessarily be identical, depending on the timing of spending the income received.

	I.	II.	III.
	From Operating Appropriations (for M.O.E.)	From Other Income	Sum of Column I plus Column II
62. Salaries and wages: salaries and wages paid to any and all employees before deductions excluding any employee benefits. Include wages paid for plant, security or maintenance staff.	\$	\$	\$
63. Employee benefits: The benefits outside of salary and wages paid and accruing to any and all employees regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts spent by the reporting unit for direct, paid employee benefits including Social Security, retirement, disability insurance, life insurance, unemployment compensation, workers’ compensation, tuition, and housing benefits.	\$	\$	\$
64. Total Library Staff Expenditures (Add #62 + 63)	\$ *	\$ *	\$ *

65. Expenditures on Materials: Include **all** expenditures for materials purchased or leased for use by the public.

65a. Books	\$	\$	
65b. Periodicals	\$	\$	
65c. AV (Videos, filmstrips, audio cassettes, etc.)	\$	\$	
65d. Other formats (Include electronic format reported in #47, Page 6)	\$	\$	
65e. Total expenditures on materials (sum of 65a through 65d)	\$ *	\$ *	\$ *

66. All other operating expenditures: Include all operating expenditures other than those reported above. Include: non-payroll expense for plant, security and maintenance; Summer Reading program materials; expenses such as binding, supplies, repair or replacement of existing furnishings and equipment and costs incurred in the operation and maintenance of physical facilities; and Operating Expenditures for Electronic Access reported in #48, Page 6, and any other operating expense not reported above.	\$ *	\$ *	\$ *
--	------	------	------

67. Total Operating Expenditures (Add together * above, #64+ #65e + #66)	*\$ (used for M.O.E.)	*\$ (not in M.O.E.)	*\$
--	--------------------------	------------------------	-----

Section B – Capital Expenditures

68. Capital Expenditures: Funds for the acquisition of or additions to fixed assets such as building sites, new buildings and building additions, new equipment (including major computer installations), initial book stock, furnishings for new or expanded building, and new vehicles. Bond funds used for these purposes should also be reported in this category. This excludes replacement and repair of existing furnishings and equipment, regular purchase of materials, and investments for capital appreciation. NOTE: Local accounting practices shall determine whether a specific item is a capital expense or an operating expense regardless of examples in the definitions.	\$	\$	\$
---	----	----	----

Revised 6/03/03

Page 8

DATA COLLECTION FORM FY 2002-2003 (as of 6/30/03)_____Library

Part XI—System Data Form (to be used only by library systems with branches)

[illegible]

*for bookmobiles count only the hours during which the bookmobile is open to the public

Revised 6/03/03

Page 9