

**Companion Guide for the Preparation of the
Public Library Survey
and
Annual Report of Public Libraries in Alberta**

**Public Library Services Branch
Alberta Municipal Affairs
November 2009**

**Government
of Alberta ■**

INTRODUCTION

This guide describes the content of the Annual Survey and Report of Public Libraries form distributed by the Public Library Services Branch. The Survey and Annual Report is required by the Minister under the *Libraries Regulation* Sections 11, 15 or 20.

Where do I find the form and instructions?

<http://municipalaffairs.alberta.ca/librarygrants.cfm>

When is the deadline for returning the form?

February 28, 2010

Where do I send the completed form?

PAPER COPY:

Send an original to:

Alberta Municipal Affairs
Public Library Services Branch
803 Standard Life Centre
10405 Jasper Avenue
Edmonton AB T5J 4R7

ELECTRONIC COPY:

If using the Word format

Send as an email attachment to:

karen.petch@gov.ab.ca

OR

If using the PDF format

Click "Submit" at the end of the form

In addition, mail an original print copy of the Authorization page, which contains the signatures of the Library Manager and the Board Chair **AND** the date the report was approved by the board to the above address. Keep a copy for your files and send a copy to your library system headquarters if applicable.

Completing the form

The form has two parts:

1. The 2010 Public Library Survey

The Survey consists of Sections A to C and includes public library identification information and six questions about board members, meeting dates, service points, library hours and plan of service. This information is used to compile a provincial directory of public libraries, to produce mailing lists and to determine compliance with provincial library legislation and regulations. Therefore, please provide current (i.e., as of the date you are filling in the report) information in this section.

2. The 2009 Annual Report

The Annual Report of Public Libraries starts with Section D. The questions under the 2009 Annual Report capture public library activity during 2009. This report documents the service activity of public library boards in Alberta and provides information on performance of our public libraries. Data on specific performance measures will be collected to produce Public Library Statistics 2009 for the province of Alberta.

2010 PUBLIC LIBRARY SURVEY

Contact Information

Name of Library Board:

Provide the full legal name of the library board as set out in *Libraries Act*, Part 1, Section 3(4): *...the municipal library board...shall be known as "The (name of municipality) Library Board."* (e.g. The Town of Drumheller Library Board; The Village of Bawlf Library Board) **This is the only acceptable form for this question.**

Name of Library:

Report the name by which the library is known.
e.g. Drumheller Public Library; David Knipe Memorial Library (Bawlf)

Telephone: Library telephone number

Fax: Library fax number

Library Email: General email address for the library.

National Library Code:

The National Library of Canada assigns an alphabetic code to any library participating in interlibrary loan activities. In Alberta, NLC codes begin with 'A' (e.g. AELNO – Elnora Public Library; AE – Edmonton). If you do not know your library code, contact your library system headquarters or the Public Library Services Branch at 780-415-4871.

Website: Report the URL for your library website.

Library Manager:

Report the person charged with the management of the daily operations of the library. It includes "Chief Librarian," "Library Director," or "Librarian."

Library Manager Email:

This is an email address that goes directly to the Manager. In a smaller library it may be the same as the library email address.

Library Manager Telephone:

This is the business telephone number for the Library Manager.

Library Manager Alternate Telephone:

This is another telephone number where the Library Manager may be reached.

Respondent:

If a person other than the Library Manager prepares the report, please provide contact information for that person. The respondent might be a library staff person, a member of the board or any person charged with completing the Annual Survey and Report of Public Libraries.

Respondent Email: This is the email address for the Respondent (if applicable)

Respondent Telephone: This is the business telephone number for the Respondent

Respondent Alternate Telephone:

This is another telephone number where the Respondent might be reached.

Mailing/Street Address of the Library:

Please provide both the Post Office Box number (if applicable) and the street address of the library. Complete all address detail as requested.

Date Survey and Report Approved By Board:

The report must be approved by the board before it is submitted to Alberta Municipal Affairs. **This is a required field.**

Signatures:

This form has lines for the signature of the Library Manager and the Chair of the Library Board on this page. Please print and sign this page in the appropriate pages and mail to the Public Library Services Branch at the address on page 2. **This is a required field.** In the absence of the chair, a designated board member may sign of behalf of the board.

A. LIBRARY MANAGEMENT

Question 1

Board Members:

NOTE: The Libraries Act REQUIRES ALL library board members to be APPOINTED BY MUNICIPAL COUNCIL (Part 1, Section 4). When the municipal council appoints members to the library board there should be written documentation regarding the term of appointment. If there is uncertainty about board member term expiration dates, contact the municipal administrator. If there is no record of library board appointments, please contact Public Library Services Branch.

Please provide full names, addresses, telephone numbers and email addresses (if applicable) for current board members (i.e., members at the time of filling in this report). Indicate the chairperson (it is not necessary to indicate positions other than chairperson). Place an "X" beside the name of any board member who is also on the local municipal council. Give the term expiry date for each board member, including those board members on municipal council. **This is a required field; "n/a" is not an acceptable response.**

NOTE: While names of board members are public information, addresses, telephone numbers and email addresses are for the use of the Public Library Services Branch only and are not made available to the public.

Question 2

a. Please give the dates of board meetings held in 2009:

Provide the actual dates of board meetings held during the reporting period. All Library Boards are required by the Libraries Act to meet at least once every four months (Part 5, Section 33(1)).

b. Number of volunteer board hours per year in board and committee meetings:

Please note the amount of time board members volunteer on library business. (Any other volunteer work in the library should be shown in Section D.)

SERVICE POINTS

Question 3

a. Number of Library Service Points:

Note the number of service points operated by your library board. A service point is a location where users can directly access library service. This includes libraries and bookmobiles. Library boards not operating a library should enter zero (0).

b. Building Ownership:

Indicate who owns the library building(s). Boards with multiple service points should indicate who owns each building (e.g., The library board has 3 service points: 1 building is owned by the municipality; 1 building is owned by the school board and 1 building is rented from a private landlord by the library board).

Question 4

Library System membership:

If your municipality belongs to one of Alberta's seven library systems, please indicate which library system.

B. HOURS OF SERVICE

Question 5

Library hours at the time of completing this report:

Provide the actual open hours for the library for each day of the week at the time of completing this report. This information will be used for the provincial directory and to calculate the yearly hours of opening. Only enter Summer Hours if they differ from Regular Hours (see example on next page).

Example:

Library Hours						
Monday	Tuesday <i>10-2</i>	Wednesday <i>4-8</i>	Thursday <i>10-7</i>	Friday	Saturday <i>10-2</i>	Sunday
Total number of library hours open per week						<u>21</u> hours/week
July and August Hours Same as hours above <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
Monday	Tuesday	Wednesday <i>10-2</i>	Thursday	Friday	Saturday <i>10-2</i>	Sunday
Total number of summer library hours open per week						<u>8</u> hours/week
TOTAL: Number of library hours open per year (actual or calculated)						<u>946</u>

Yearly Hours Calculation:

The yearly total will be used as a library performance measure.

There are two possible calculations:

1. If your library hours are the same all year: 50 weeks per year x number of hours
2. If summer hours differ from regular hours: (42 regular weeks x number of hours) + (8 weeks x number of hours). If your summer hours are not in place for 8 weeks, please adjust the number and provide your total number of annual opening hours.

C. PLAN OF SERVICE

Question 6

The Plan of Service outlines the Library Board’s service initiatives as defined through a public consultation process. The Plan of Service normally covers a 3 to 5 year period. A plan of service must be filed at least every 5 years.

The *Alberta Libraries Regulation* requires boards to have a plan of service that is current and on file with the Minister (Section 13) at Public Library Services Branch. Please check the most recent plan you have filed with the Minister and note the dates. It must be current for your board to be eligible for your provincial grant in 2010.

This is the end of the Public Library Survey section of the report.

2009 ANNUAL REPORT OF PUBLIC LIBRARIES IN ALBERTA

D. PERSONNEL

Question 7

Report qualifications and the number of all paid staff who work for the library whether they are paid directly by the board or paid through the municipality.

NOTE: do not include individuals who provide service through a contract, such as the library audit, custodial staff or bookkeeping.

Qualifications	Number of Employees per Category				Total Number of Employees	Total Hours (per year)
	Report all paid staff/individuals in the categories below					
Professional Librarian	Full Time	1	Part Time	Temporary	1	1,820
Other University Degree	Full Time		Part Time	1 Temporary	1	910
Library Technician	Full Time	2	Part Time	Temporary	2	3,640
Library Operations Assistant	Full Time		Part Time	Temporary	0	0
Other Tech/College Diploma	Full Time	1	Part Time	Temporary	1	1,820
Other Paid Positions	Full Time		Part Time	2 Temporary	2	1,000
TOTAL		4		3 0	7	9,190

Question 8

Volunteers

Many public libraries in Alberta rely on volunteers to staff the library at least part of the time or to provide supplementary services. We are interested in how many volunteer hours are contributed and how many positions they hold.

NOTE: Do not include volunteer hours contributed by board members on library business. Record those volunteer hours under Section A.

Type of Work	Number of Volunteers	Total Hours (per year)
Library Operations	39	984
Library Programming	15	115
Fundraising	47	200
Outreach		
Friend	52	760
TOTAL	153	2059

E. COLLECTIONS/RESOURCES

Question 9

Books - Print:

In this section, include all books (in all categories) in print format. Include both catalogued and uncatalogued books. Do not include e-books or MP3 books.

Total volumes from previous year:

Use the number recorded under "Total volumes in collections at the end of the reporting period" from your 2008 Annual Report.

a. Volumes acquired during reporting period:

Report new volumes added in 2009 through purchases, donations, etc. You may obtain numbers from system reports and/or from manual counts.

b. Volumes withdrawn during reporting period:

Report number of books withdrawn through weeding, discards, lost items, etc.. You may obtain numbers from system reports and/or from manual counts.

c. Total volumes in collection at the end of the reporting period:

This number will be reported in Alberta Public Library Statistics. The formula for this calculation is:

Total volumes from previous year
PLUS
a. Volumes acquired during reporting period
MINUS
b. Volumes withdrawn during reporting period.

Question 10

Magazine & Newspaper Subscriptions – Print Titles

Report the number of printed magazine and newspaper titles to which your board subscribes. This may include gift subscriptions/donated subscriptions. If the library gets multiple copies of a title, count each copy of that title (e.g. if your library has three paper subscriptions to Maclean's, count as three). NOTE: Please do not count electronic magazine or newspaper titles or online databases in this section.

Question 11

Non-Print Materials by Physical Unit

Provide a count of each physical unit for a non-print item by category. A physical unit of library material distinguished from other single units by a separate binding, encasement or other clear distinction.

Question 12

Total of all physical collections owned by the Board

This is the total of print volumes, print magazine and newspaper subscriptions and physical non-print materials. The formula for this calculation is:

9c. Total print volumes in collection at end of reporting period

PLUS

10. Total of all print magazine and newspaper subscriptions

PLUS

11g. Total non-print

Question 13

Online/Electronic Non-Print

If your library licenses any electronic resources such as e-books, MP3 books, magazine subscriptions, movies or databases, include those items in this section. Count only items licensed by your board. Do not count databases licensed by your library system or consortia such as TAL in this section.

Question 14

Total of all physical collections and licensed items

Add the following together:

12. Total of all physical collections owned by the Board

13j. Total of electronic items owned or licensed by the board

F. CIRCULATION

Question 15

Direct Circulations

This is a standard library performance measure. Count all items circulated directly to library users. Include all items that are loaned out for use, whether the use is inside or outside of the library.

Do not include interlibrary loan materials sent to other libraries.

f. Online/Electronic circulation – Electronic/online resources are fast becoming an integrated part of library collections and in some instances, are circulated to library users in a traditional manner, although the means of transmission is electronic. For instance, your library may subscribe to an electronic book service which allows library users to download books onto a personal device. The material may be accessed by the user, but software accompanying the download will cause the material to be ‘erased’ after a specific time period. Count all items that are circulated as a download for a discrete, limited time period through the circulation system (or another product) and are reported to the library as circulated.

Question 16

Bulk loans

Count all items lent to institutions such as other libraries, schools, hospitals, prisons, senior citizen homes, if not included in direct circulations. Do not include interlibrary loans.

Question 17

Total Circulation

Add totals for Direct Circulations (15g) and Bulk Loans (16)

G. INTERLIBRARY LOANS

Question 18

Interlibrary loan is the loan of a library item(s) from the collection of one library to another library in order to fill a request. Providing a substitute for the requested item (e.g. a photocopy) is also considered to be an interlibrary loan.

Provide counts for:

- i) loans to users within the Province, both within and outside of your Library System
- ii) loans to users outside of the Province but within Canada
- iii) loans to users outside of Canada

There may be a variety of reports which will provide detail for this section. Some of these may be manual counts recorded throughout the year; some may come from reports provided by the Library System.

H. REFERENCE TRANSACTIONS

Question 19

Definition of a reference transaction:

A reference transaction is an encounter between a library user and a member of the library staff which involves an attempt to supply factual or bibliographic information requiring knowledge, use, recommendation or interpretation of an information source or bibliographic tool. It includes informal technology training sessions, such as how to use email, demonstrating a URL or how to print a document.

It does NOT include a directional or administrative question.

Count all reference transactions including those that:

- a) or d) take place in person at the library,
- b) or e) come as telephone or fax queries, and
- c) or f) come through email or your website if you offer that service.

You may either choose a typical week to report or use an annual total. Report in either the Weekly Count section and multiply by 50 for a yearly total or the Yearly Count section (if both sections are filled in, the Yearly Count will be used for the 2009 Public Library Statistics). Combine the totals from either the weekly total section (multiply by 50) or the yearly total section to determine the total reference transactions.

I. LIBRARY USE

Question 20

a. Library users:

This is a standard performance measure. Count all the people physically entering or re-entering the library, as would be counted by a turnstile. It can be done as an annual or a weekly count (multiply by 50 for an annual total).

b. “Virtual” visits to library website and catalogue from outside library:

This is a count of the number of people who access your library’s services through your website and/or online catalogue.

Total yearly visits to your library website: a counter on the library website will provide these numbers. If the site is hosted by another organization, they might be able to provide some numbers. Do not include counts from host websites such as your town or library system site. This question is for libraries with their own site.

Total number of yearly virtual visits to library catalogue: this detail may come from the circulation system administrator. The software used for a Union Catalogue (e.g. TRAC) may not be able to report catalogue visits for all of the service points it represents. If this is the case, put “N/A.”

c. In-house use:

This is a count of all physical materials used in the library but not circulated. It can be done as an annual or a weekly count (multiply by 50 for an annual total).

J. PROGRAMS

Question 21

For this section we use **Library Service Responses** as defined by the Public Library Association to identify program categories. Service responses help to define the work that public libraries do and the unique services public libraries provide. We encourage you to think of your program activities as service responses to the community needs you have identified in your community needs assessment. These headings will assist you to better identify the public services you provide to your community.

Provide the number of program sessions/activities for the year and the number of participants. For programs with more than one session, count the total number of sessions and total number of participants at these sessions.

If you have not kept a record of all your participants, you will need to calculate this total. To calculate total participants, multiply total sessions by total participants at each session. If the number of participants varies from session to session, calculate total participants based on the average number of participants (e.g., 15 story times, 20 children at each story time = 15 X 20 = 300 participants).

NOTE: to public libraries in schools – please do not count WEEKLY CLASS VISITS to the library UNLESS each class would have come to the public library every week even if it was housed in another building elsewhere in town. Weekly class visits are a program of the school library.

Although the program categories provided may not fully match the activities in your library, try to align library programs as closely as possible with the options provided. A complete list of library programs may be sent as an addendum to the Annual Report and Survey of Public Libraries.

K. LIBRARY CARDHOLDERS & FEES

Question 22

Cardholders:

Report the number of active cardholders. Due to shared service agreements or library system agreements, the differences between residents and non-residents are becoming blurred.

Individual cardholders have their own library card. Family cardholders may share one card or have individual cards within the family card program. In this case, report either the number of family cards x 3.1 individuals, or the actual number of individuals who use a family card.

Question 23

Card fees:

Report the annual card fee charged by your library board as set out in your bylaws. Please indicate in the comments if you exempt fees or have a special “free card” program. If you do not charge fees at all, put zero (“0”). If your board has a different fee schedule for non-residents, please report it in this question, but do not include non-resident fees put in place by your regional library system.

L. LIBRARY FACILITIES

Question 24

A service point is a location where users can directly access library service. This includes bookmobiles. Report the area in square metres of all library service points operated by your board. Include all areas used for library purposes, e.g. shelves, workroom, study area, computer labs. Do not include areas used solely for janitorial, custodial, and mechanical storage or

service. Do not include auditoria, art gallery space, coffee shops, and commercial space. In order to convert a measurement of square feet to one of square metres, multiply square footage by 0.09.

M. ELECTRONIC PERFORMANCE MEASURES

Question 25

a. Workstations:

This is a count of the number of public workstations in your library. The first section is a count of those workstations with Internet access, and the second section is a count of those without Internet access, such as those dedicated to games, word processing, etc. Do not count workstations that are used exclusively by staff.

b. Workstation Sessions:

This is a measure of the volume of usage of the workstations.

i. Number of public workstation sessions:

Report the number of separate times each public workstation was in use, either during a one week survey undertaken during a typical week (multiply by 50 to arrive at an annual figure) or provide an actual count of sessions for the year.

ii. Total hours workstations were in use during workstation sessions:

Report the total hours that public workstations were actually used. If workstation sessions are 1 hour in length, then it is a simple matter of tracking the total number of sessions and reporting the number of hours. If workstation session times vary, then there will have to be some kind of method employed to determine the actual hours that the workstations are in use.

iii. Length of workstation sessions:

Indicate the length of time that constitutes a workstation session in your library. Report the number of minutes or the number of hours (e.g., 1 hour, 15 minutes, etc.)

c. Workstations – Users in the library

Count the number of discrete public workstation users either during a typical week (multiply by 50) or from an actual count taken during the year. If a user came and used a workstation more than once in a day, only count that person once.

d. Wireless access

Indicate if your library offered any kind of wireless internet access. Provide details about the service in the Comments section (Question 28)

N. USER SATISFACTION

Question 26

This question provides some indication of how satisfied your library users are with your library and its services. We suggest you carry out a simple survey during a typical week.

Start with the total number of surveys completed. Asking for the total number of surveys offers a sense of the survey 'sample' and can be used to determine the percentage of users who participated in the survey. You are asked to provide an average rating on a scale of 1-5 for each of the seven service indicators. Your rating for each service indicator should be in the range of 1-5.

- i) Library staff (knowledge, helpfulness)
- ii) Library collection
- iii) Information services
- iv) Library facilities
- v) Electronic resources
- vi) Library hours
- vii) Overall satisfaction with library

Calculate the rating for each indicator. Add up the rating scores for each category. Divide the total by the number of answers received in that category

e.g., i) Satisfaction with library staff. 200 of 205 survey respondents answer the question. Add the rating results together to get a total score for the question - The total will be no greater than 200 x a maximum of 5 or 1000. Divide by the total number of responses (200) to the Library Staff question. If library staff scored a total of 872 when all the rating results were added together, then 872 divided by 200 surveys = an average rating of 4.36.

What percentage of people surveyed found what they were looking for?

This question will provide some indication of how successfully the library has met user needs. Options are: yes, no, or partially. To calculate, take the total number of surveys for each response and divide that number by the total number of answers. To get the percentage response, multiply that number by 100.

e.g. 246 people of 872 said yes they found what they were looking for:
 $246 \div 872 \times 100 = 28\%$ of people found what they are looking for.

Question 27

Library User Comments:

Please share any comments or concerns expressed by library users during the reporting period. You may summarize if there are many comments.

COMMENTS AND ACCOMPLISHMENTS

Questions 28 and 29

Please itemize achievements or provide anecdotal information that reflects your board and staff accomplishments and any comments you may have on service at the provincial level.

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The annual report is filed by the library board pursuant to the Libraries Regulation 141/98, July 1998. By signing, the Board accepts the report, certifies its essential accuracy and transmits it to Alberta Municipal Affairs, Public Library Services Branch, in accordance with the above regulation. Personal information contained in the report will not be disclosed except for use by the Alberta Municipal Affairs. If you have questions about the report, please contact Kerry Anderson at 780-644-5487 (call toll free through Service Alberta at 310-0000).

Sign and date the first page and submit the report by February 28, 2010. The report must be submitted in order for your board to be eligible for your provincial grant in 2010.