

**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  
January, 2015**

*Alberta*  Government

## **INTRODUCTION**

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

**Where do I find the instructions, forms, and link to the online data entry portal (LibPAS)?**

[http://www.municipalaffairs.alberta.ca/plsb\\_survey\\_and\\_annual\\_report.cfm](http://www.municipalaffairs.alberta.ca/plsb_survey_and_annual_report.cfm)

**When is the deadline for completing the Annual Survey and Report?**

**February 28, 2015**

**Please ensure that the date the report was approved by the board is filled in. It is now a required field, meaning that you cannot submit the report to PLSB without it.** Print and 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 Public Library Survey**

The Survey gathers public library identification information and includes 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 Annual Report**

The questions under the Annual Report capture public library activity during 2014. 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 2014 for the province of Alberta.

## **2015 PUBLIC LIBRARY SURVEY**

### **ALBERTA PUBLIC LIBRARY SURVEY**

#### Directory

**The following Directory fields now prefill with the data from the previous year's survey. Please review all data to ensure it is correct and make any necessary changes before submitting.**

**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.

**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 Phone:**

This is the business telephone number for the Library Manager.

**Library Manager Alternate Phone:**

This is an alternate number that could be used to reach the Library Manager, if necessary.

**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 Phone:** This is the business telephone number for the Respondent.

**Respondent Alternate Phone:**

This is an alternate number that could be used to reach the respondent, if necessary.

**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.

Board Approval

**Date Survey and Report Approved By Board:**

**This is a required field.** The report must be approved by the board, and the date it was approved must be entered before it can be submitted to Alberta Municipal Affairs.

Library Management – 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). As well, indicate 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.

Library Management - General

**Board meeting dates:**

Provide the actual dates of board meetings held in 2014. All Library Boards are required by the *Libraries Act* to meet at least once every four months (Part 5, Section 33(1)). Please use the following format: Jan 28, Feb 14, etc.

**Board Volunteer hours:**

Please note the amount of time board members volunteer on library business, such as attending board and committee meetings. (Any other volunteer work in the library should be shown in the section on volunteers).

**Building Ownership:**

Indicate who owns the library building. This field prefills with the information from the previous year.

Hours of Service

**Library hours at the time of completing this report:**

This field now prefills with the data from the previous year’s report. Please review all data to ensure it is correct and make any necessary changes before submitting. These hours of service reflect the actual open hours (i.e., 10:00-5:00; 1:30-8:30, etc.) for the library for each day of the week at the time of completing this report.

In the column labelled “Total Hours”, enter the number of hours open per week based on the indicated library open hours.

This information will be used for the provincial directory and to calculate the yearly hours of opening.

**Hours Open per Year 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 regular weeks per year x number of hours
  
2. If summer hours differ from regular hours:  
[(50 - # summer weeks) x number of hours] + (# summer weeks x number of hours)

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

## 2014 ANNUAL REPORT OF PUBLIC LIBRARIES IN ALBERTA

### PERSONNEL

#### Staff

Report qualifications and the number of all paid staff that work for the library, whether they are paid directly by the board or paid through the municipality. Report total number of employees (i.e., “live bodies”) and the total hours worked in 2014 (you may need to get this figure from the individual or agency that does your staff payroll).

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

#### Definitions

*MLIS or equivalent* – possesses a Masters degree from an accredited library school, or the equivalent

*Other University Degree* – a graduate from a degree-granting post-secondary institution in any other discipline

*Library Technician* – possesses a diploma from a recognized library technician’s program

*Library Operations Assistant* – has completed the LOA course offered by SAIT

*Other Tech/College Diploma* – a graduate from a technical institute or college in any other discipline

*Other* – High School, etc.

#### 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 in “Board Volunteer Hours”.

**NOTE:** Do not include volunteer hours contributed by Friends of the Library members on Friends business (e.g. their fundraising events and activities). Record those hours in the separate line labeled “Friends of the Library”.

### COLLECTIONS/RESOURCES

#### Print materials

In this section, include all books (in all categories) in print format. Include both catalogued and uncatalogued books. Do not include audiobooks, e-books or MP3 books here – they are recorded in subsequent categories

**Total volumes from previous year:**

Use the number recorded under “Total volumes in collections at the end of the reporting period” from your 2013 Annual Report.

**Volumes acquired:**

Report new volumes added in 2014 through purchases, donations, etc. You may obtain numbers from system reports and/or from manual counts.

**Volumes withdrawn:**

Report number of books withdrawn in 2014 through weeding, discards, lost items, etc.. You may obtain numbers from system reports and/or from manual counts.

**Total print volumes:**

Normally, the formula used here is:

*Total volumes from previous year*

PLUS

*Volumes acquired*

MINUS

*Volumes withdrawn*

**Subscriptions**

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.

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

**Audiobooks** – spoken word/audiobook sound recordings including but not limited to cassette, compact disc, DAISY Book, Playaway etc.

**Music recordings** – music sound recording including but not limited to cassette, compact disc, LP record, etc.

**Videos** – movies, TV series, documentaries, etc. including but not limited to DVD, videocassette, film, etc. formats.

**CD-ROMS** – including but not limited to games, software, reference works, etc.

**Microforms/microfiche/microfilm** – consists of miniaturized images printed onto a reel or sheet of film.

**Other** – any other non-print material not listed above.

## Virtual Collections (Licensed by your board)

If your library board licenses any electronic resources such as e-books, music, 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, PLSB, or consortia such as TAL in this section.

**Ebooks** – books in EPUB format, PDF format, etc.

**Magazines/newspapers** – online subscriptions to digital magazines and/or newspapers.

**Audiobooks** – spoken word/audiobook sound recordings in MP3 format, WMA format, etc.

**Music** – streaming music, music in MP3 format, etc.

**Movies** – streaming movies, TV shows, documentaries, etc.

**Games** – subscriptions to online games for patron use.

**Other** – any other virtual resource not listed above.

**Locally Created Databases** - Non-licensed, non-subscription databases created locally or any other online, networked resource not accounted for above.

## Totals

### **Total physical collections**

This is the total of print volumes, print magazine and newspaper subscriptions and physical non-print materials. LibPAS will automatically calculate this.

### **Total electronic/licensed items**

This is the total of online/electronic resources owned or licensed by your library board. LibPAS will automatically calculate this.

### **Total collections**

All physical collections and online/electronic resources. LibPAS will automatically calculate this.

## CIRCULATION

### Direct Circulations

This is a standard library performance measure. Count all items circulated directly to library users (**Adult print, Juvenile print, Adult non-print, Juvenile non-print, Magazines/newspapers**). 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.

**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.

**Total Direct Circulation** – LibPAS will automatically calculate this.

**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.

**Total Circulation-** LibPAS will automatically calculate this.

## Interlibrary Loan

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 (items borrowed and items lent) for:

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

## REFERENCE AND USE

### Reference Transactions

*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.

Reference transactions can be categorized as follows:

**Person to person** – take place in person at the library

**Telephone or fax** – come as telephone or fax queries

**Electronic/online** – 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 (multiply by 50 for an annual total).

LibPAS will automatically calculate the totals for **Total non-electronic/online reference transactions during the reporting year** and **Total of all reference transactions during the reporting year**.

## Library Use

### **Annual Visits/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).

### **Visits to library website:**

This is a count of the number of people who access your library's services through your 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.

### **Visits to library catalogue:**

This is a count of the number of people who access your library's services through your online 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."

### **Virtual Visits:**

LibPAS will automatically calculate this.

### **In library material 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).

## PROGRAMS

*A library program is a pre-planned, co-ordinated event that:*

- *meets a service response as indicated in the board's Plan of Service*
- *is hosted/presented by the public library*
- *is set for a designated time and place*
- *has a defined purpose*
- *has library resources (staff time, money, etc.) dedicated to it - i.e., it is budgeted for; and*
- *may involved a registration process and/or some promotion of the event*

Provide the total number of program sessions/activities for the year and the total number of 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.

**Library Awareness:**

This is a count of activities held by the library which promotes awareness of the library. These activities are not considered programs as they do not meet a service response. Examples include trade shows, an open house, participation in community nights, etc.

**CARDHOLDERS, FEES, FACILITIES**

**Cardholders**

Report the number of active cardholders. This includes both resident and non-resident library cards issued by your library.

Individual cardholders generally have their own library card. Record them under “individual cards.”

Family cardholders may share one card or have individual cards within the family card program. If family cards are shared, report the number of cards under “family cards.” If not, report the number of cards under “individual cards.”

**NOTE:** If all members of a family receive their own card and have their own patron record, report them under “individual cards” regardless of whether your library uses the designation of Family Card.

LibPAS will automatically calculate total cardholders based on 1 individual per individual card and 3.1 individuals per family card (i.e., Total individual cardholders + (3.1\*Total family cardholders)).

**Card fees**

Report the annual card fee charged by your library board as set out in your bylaws.

**If you do not charge fees at all, put zero (“0”) in each of the categories – do not leave these fields blank.**

**If you do not issue cards in a certain category, leave it blank.**

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 library system.

## Library Facilities

A service point is a physical location where users can directly access public 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.

LibPAS will automatically calculate the square footage based on what is entered in the square metre field.

## ELECTRONIC PERFORMANCE MEASURES

### 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.

### Workstation Sessions

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

**Number of 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.

**Workstation hours** – Report the total hours that public workstations were actually used during the year. 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. You may either choose a typical week to report or use an annual total (multiply by 50 for an annual total).

**Length of workstation sessions** – Indicate the length of time in minutes that constitutes a workstation session in your library. Report the number of minutes only (e.g., 15 minutes, 60 minutes to indicate 1 hour, etc.)

### Workstations Users

Count the number of 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.

## USER SATISFACTION

### Rating averages

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. 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 4.4.

### User success

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 partly. 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.

### Comments

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

## **COMMENTS AND ACCOMPLISHMENTS**

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.

## ***NOTICE***

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*The annual report is filed by the library board pursuant to the Libraries Regulation 141/98, July 1998. By approving, 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).*

Submit the report by February 28, 2015. The report must be submitted in order for your board to be eligible for your provincial grant in 2015.