

# **INSTRUCTIONS**

**Please read these instructions carefully.**

**Annual Report  
Local Fiscal Year 2008**

**Texas State Library and Archives Commission**  
Library Development Division

# INSTRUCTIONS

The Texas State Library and Archives Commission participates in a national public library data collection system. The purpose of this system is to ensure the collection of comparable data in all states. The data is used for the creation of a composite report on the public libraries of the United States and for state-to-state comparisons by the Institute of Museum and Library Services (IMLS). This report is also used to accredit Texas public libraries and some data elements are used for that purpose.

Definitions are important to ensure comparability of data from different libraries and states. Please refer to the definitions as you complete this survey.

*Estimates are important if exact data are not available. Reporting libraries should not leave any items blank. They should enter "0" if the appropriate entry for an item is zero or "none" and enter "N/A" if an item does not apply to a particular library. If an exact figure is not available for a particular item, but it is known that the amount is greater than zero, the librarian should ENTER AN ESTIMATE OF THE AMOUNT. If you need to estimate, please use a standard methodology for doing so. If you have questions about this, please contact the State Library – see contact information below.*

Public libraries are encouraged to collect data in all categories so that estimates will not be necessary in future years.

All questions relate to fiscal year 2008, i.e., the year that ended in calendar year 2008 and included January 1, 2008. Libraries that had a change in fiscal year should contact Bell Clarke at the Texas State Library and Archives Commission for assistance at 512/463-5466 or bell.clarke@tsl.state.tx.us.

## GENERAL INFORMATION

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**1.1 – 1.32** All information about your library and library personnel should be reported exactly as you wish it to appear in the *Texas Public Library Directory for 2008*. If the Head Librarian (item #1.17 and #1.18) position is vacant, enter "Vacant position" on the form. **1.12** A listed number is a telephone number that can be accessed through directory assistance. If you do not want your telefax number to appear in the directory, please omit. If your library is reachable by electronic mail, please provide the address for the director or other administrator, the email address for the library, and the Web page address for the library. By entering this information you understand that this becomes public information. Do not use personal email addresses if not for public consumption.

Some county, multi-county, and regional library systems have a main library. Such library systems may have a headquarter's office with a different name. If the headquarter's address is the same as the main library's, the main library should be listed as a branch of this headquarters. For example: The Burnet County Library System is headquartered at the same place as the Herman Brown Free Library of Burnet. The Herman Brown Free Library should be listed as a branch of the Burnet County Library System even though they are in the same location.

## **OUTLETS AND USERS**

This section requests information on public service outlets. Report figures as of the last day of the fiscal year. If there is a new branch, but it was not open for business before the end of your local fiscal year, it should not be included on this report.

**2.1 BRANCH LIBRARIES.** Branch libraries are auxiliary units that have at least all of the following: (1) separate quarters, (2) an organized collection of library materials, (3) paid staff, and (4) a regular schedule for being open to the public. They are, however, administered from a central unit. Regional or divisional centers should be counted as branches.

**2.2 BOOKMOBILE.** A bookmobile is a traveling branch library and has at least all of the following: (1) a truck or van that carries an organized collection of library materials, (2) paid staff, and (3) regularly scheduled hours (bookmobile stops) for being open to the public.

**2.3 RENOVATIONS, EXPANSION, NEW CONSTRUCTION.** Structural changes only.

**2.4 SQUARE FOOTAGE OF THE MAIN LIBRARY.** Provide the area, in square feet, of the main library. This is the area on all floors enclosed by the outer walls of the library. Include all areas occupied by the library, including those areas off-limits to the public. Include areas shared with another agency or agencies if the library has use of that area.

## **LIBRARY EXPENDITURES AND INCOME FROM ALL SOURCES**

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Expenditures and income have been divided into three sections in order to facilitate reporting: Categories of Expenditures, Local Financial Effort, and Library Income by Source.

All operating and capital expenditures should be reported in Categories of Expenditures, which includes specific items that appear in most library operating budgets. All other expenses should be reported in Miscellaneous so that the total of all direct operating expenditures are together. Capital expenditures will appear separately in #3.12.

*Note: These expenditures are from all sources of funds, including federal, state, and foundation monies. Report only those grant awards directly spent by your library.*

*Do not include any funds, either income or expenditures, from regional library systems, TANG, or ILL.*

## **Categories of Expenditures**

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**OPERATING EXPENDITURES.** The current and recurrent costs necessary to support the provision of library services, such as:

- Personnel
- Library materials
- Binding
- Supplies
- Repair or replacement of existing furnishings and equipment, and
- Costs incurred in the operation and maintenance of the physical facility.

**Expenditures represent actual payments.** Report actual expenditures, not budget amounts. The information reported in Categories of Expenditures may differ from the information reported in Library Income by Source.

Do not report grant funds spent for your library by some other entity. For example, don't report funds spent by your Major Resource System library for your library. Don't report salaries not paid by the library or the governing or contracting authorities, as in the case of Green Thumb employees or employees paid under a training program administered through another entity.

Significant costs of ordinary operating expenditures, 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 reporting agency. Only such funds that are supported by expenditures documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included. **Estimated costs are not reported.**

*Note: Local accounting practice will generally determine whether a particular expense is operating or capital.*

**3.1 SALARIES AND WAGES.** This amount should be the salaries and wages for **all** library staff including plant operation, security and maintenance staff. Include salaries and wages before deductions, but exclude "employee benefits." Include longevity, merit, and other funds paid directly to employees.

**3.2 EMPLOYEE BENEFITS.** These are the benefits outside of salary and wages paid and accruing to employees. Record benefits for all plant operations, security, and maintenance staff, regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts for direct paid employee benefits including:

- Social Security
- Retirement
- Medical insurance
- Life insurance
- Guaranteed disability income protection
- Unemployment compensation
- Worker's compensation
- Tuition, and
- Housing benefits.

**3.3 SUBTOTAL WAGES AND BENEFITS.** This is a total of the salaries and wages plus the employee benefits.

**COLLECTION EXPENDITURES.** Include all operating expenditures from the library budget for all materials in print, microform, electronic, and other formats considered part of the collection, whether purchased, leased, or licensed. Exclude charges or fees for interlibrary loans and expenditures for document delivery.

**3.4 PRINT MATERIALS.** Books, serial back files, current serial subscriptions, government documents, and any other print acquisitions.

**3.5 MATERIALS IN ELECTRONIC FORMAT.** Report all operating expenditures for electronic (digital) materials. Types of electronic materials include e-books, e-serials (including journals), government documents, databases (including locally mounted, full text or not), electronic files, reference tools, scores, maps, or pictures in electronic or digital format, including materials digitized by the library. Electronic materials can be distributed on magnetic tape, diskettes, computer software, CD-ROM, or other portable digital carrier, and can be accessed via a computer, via access to the Internet, or by using an e-book reader. Include expenditures for materials held locally and for remote electronic materials for which permanent or temporary access rights have been acquired. Examples of materials in electronic format include U.S. Census data tapes, databases (include expenditures for locally purchased database licenses), serial subscriptions, and reference tools. **Exclude operating expenditures for library system software and microcomputer software used only by the library staff or fees for TexShare databases.** These are reported in “other operating expenses” below.

**3.6 OTHER MATERIALS.** Report all operating expenditures for other materials, such as microforms, audio, video, DVD, and materials in new formats.

**3.8 OTHER OPERATING EXPENSES.** This includes all expenditures other than those reported for Total Staff Expenditures (3.3) and Total Collection Expenditures (3.7). Include expenses such as binding, supplies, repair or replacement of existing furnishings and equipment; and costs of computer hardware and software used to support library operations or to link to external networks, including the Internet. Report contracts for services, such as costs for operating and maintaining physical facilities, and fees paid to a consultant, auditor, architect, attorney, etc. **Include fees paid to the TexShare program.**

**3.10 INDIRECT COSTS.** This should only be reported when a library has failed to meet the maintenance of effort requirement for system membership. If included, the expense must be documented by the local government entity that provided the service, and the document must be submitted to the state library with a signature from a government official with fiscal authority. An indirect cost is a cost incurred for a normal library operating expenditure (such as janitorial services, purchasing, accounting, grounds maintenance, utilities, insurance, telecommunications, or payroll services) that is not assigned to the library's budget, but paid for by a local government agency on behalf of the library. **DO NOT** include capital expenditures. If you are claiming indirect expenditures and are uncertain whether an expenditure may be claimed please contact us.

**3.12 CAPITAL OUTLAY.** These would be one-time only or extraordinary expenditures. Expenses for the acquisition of or additions to fixed assets such as building sites, new buildings and building additions, new equipment (including major computer installations, such as library automation systems), initial book stock, furnishing for new or expanded buildings, and new vehicles. Include federal, state, local, or other revenue used for major capital expenditures. Exclude replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation.

**3.13 INDIRECT SUPPORT.** These are normal library operating expenditures not part of the library's budget, but paid for on behalf of the library by a local government agency. These costs may include, among others, expenditures such as janitorial services, purchasing, accounting, grounds maintenance, utilities, insurance, telecommunications, or payroll services.

## Local Financial Effort

These questions pertain to the requirements for continued system membership established by the Texas State Library and Archives Commission (Title 13, Texas Administrative Code, Sections §1.74, §1.77, and §1.81).

**Item 4.1** Report the amount spent for library materials from local funds only. That is, the part of the amount in Item 3.7 that came from city, library district, county, school district, or other local sources. This amount may be the same as Item 3.7, but do not include materials expenditures from Loan Star Libraries grant allocations.

**Item 4.2** Report the amount of funds spent by the public library in FY 2008 for total operating purposes from local funds (city, library district, county, school district, and other local sources such as fines, memorials, and monetary gifts). This will be used to determine if your library has met the maintenance of effort requirement for accreditation. All the expenditures reported in Item 4.2 should be from local sources. This amount may be the same as Item 3.11; however, do not include expenditures from Loan Star Libraries grant allocations. Include documented indirect costs (Item 3.10) only when necessary to meet the average of expenditures for the maintenance of effort requirement.

**Item 4.3** Report the amount of total operating expenditures that were from local government sources (city, library district, county and school district funding). Do not include the indirect amounts from these sources. Do not include Loan Star Libraries grant allocations.

## Library Income by Source

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The total funds reported as Library Income will not necessarily equal the total of expenditures reported. Do not report grant funds spent on behalf of your library by some other entity. For example, don't report funds spent by your Major Resource System for your library. Don't report salaries not paid by the library, as in the case of Green Thumb employees or employees paid under a training program administered by another entity.

**5.1 – 5.12 OPERATING INCOME.** Report income received for operating expenditures. Include federal, state or other grants. Do NOT include income for major capital expenditures, construction, renovation, endowment fund deposits, other extraordinary items such as one-time grant awards, income not available for use by the library (e.g., fines), or funds unspent from previous fiscal years.

**5.1 – 5.4 LOCAL GOVERNMENT SOURCES.** All tax and nontax receipts appropriated by the city, library district, county, or school district to the public library and available for expenditure by the public library. Do NOT include the value of any contributed, indirect, in-kind services, or the value of any gifts and donations, fines, fees, or grants.

**5.5 LOAN STAR LIBRARIES GRANT FUNDS.** All revenue from the Loan Star Libraries grant funds distributed directly to your library used for operating expenditures.

**5.6 STATE FUNDS.** All revenue from funds collected by the State and distributed directly to your library for expenditure by the public library. Do not include grants from a library system.

**5.7 FEDERAL LIBRARY SERVICES AND TECHNOLOGY ACT (LSTA) FUNDS.** All funds from a federal LSTA grant distributed directly to your library for expenditure by the public library. Do not include grants from a library system.

**5.8 OTHER FEDERAL FUNDS.** All other revenue from the federal government other than that reported in Item 5.7 and distributed directly to your library for expenditure by the public library, including such federal monies distributed by the State.

**5.10 FOUNDATIONS AND CORPORATE GRANTS.** Cash grants from private foundations or corporations that are received on an ongoing basis and are incorporated into the library's operating budget.

**5.11 OTHER LOCAL SOURCES.** Report all income other than that reported in other categories. Include, for example, monetary gifts, or donations from individuals, interest, fines, and fees. Do not include the value of any contributed services or the value of "in-kind" gifts and donations.

**5.12** This is a subtotal of the other operating income (items 5.10+5.11).

**5.13 TOTAL OPERATING INCOME.** This is the total of funds available for the operation of the library.

**5.14 – 5.22 CAPITAL INCOME.** Report income received for major capital expenditures, construction, renovation, endowment fund deposits, or other extraordinary items. Do NOT include income passed through to another agency (e.g., fines), or funds unspent from previous fiscal years.

**5.14 – 5.16 LOCAL GOVERNMENT SOURCES.** All tax and nontax receipts appropriated by the city, library district, county, or school district to the public library and available for the purpose of major capital expenditure by the public library. Do NOT include here the value of any contributed, indirect, in-kind services, or the value of any gifts and donations.

**5.17 LOAN STAR LIBRARIES GRANT FUNDS.** All revenue from the Loan Star Libraries grant funds distributed directly to your library used for capital expenditures.

**5.18 OTHER STATE FUNDS.** All revenue from funds collected by the State and distributed directly to your library for the purpose of major capital expenditure by the public library, except for federal monies distributed by the State. Do not include grants from a library system.

**5.19 FEDERAL LIBRARY SERVICES AND TECHNOLOGY ACT (LSTA) FUNDS.** All funds from a federal LSTA grant distributed directly to your library for the purpose of major capital expenditure by the public library. Do not include grants from a library system.

**5.20 OTHER FEDERAL FUNDS.** All other revenue from the federal government other than that reported in Item 5.19 and distributed directly to your library for the purpose of major capital expenditure by the public library, including such federal monies distributed by the State.

**5.21 FOUNDATIONS AND CORPORATE GRANTS.** Cash grants from private foundations or corporations, such as the Meadows Foundation, the Tocker Foundation, etc. for the purpose of major capital expenditure by the public library.

**5.22 OTHER LOCAL SOURCES.** Report all income other than that reported in other categories for the purpose of major capital expenditure by the public library. Include, for example, monetary gifts, or donations from individuals. Do not include the value of any contributed services or the value of "in-kind" gifts and donations.

**5.23 TOTAL CAPITAL INCOME.** This is the total of funds received for one-time only or extraordinary expenditures.

**5.24 – 5.25 CITIES OR COUNTIES FUNDING THE LIBRARY.** If your library receives funds from more than one city or county, please report here those received from any jurisdiction **other than** those in which the library is located.

## **LIBRARY COLLECTION**

*Note: Unless otherwise indicated, report for each item, title, and physical unit the amount held at the end of the fiscal year. Physical units are volumes, items, or pieces. For reporting purposes, a title is a publication that forms a separate bibliographic whole, whether issued in one or several volumes, reels, disks, slides, or parts. The term applies equally to printed materials, such as books and periodicals, as well as audiovisual materials. Libraries should report the number of titles and units acquired as part of the collection and catalogued, whether purchased, leased, licensed, or donated as gifts. Please do not count uncatalogued paperbacks.*

Most software systems include a method of determining number of titles. Libraries should use whatever method their software provides. If no method is available, an estimate should be made.

**6.1 – 6.2 BOOKS.** A nonperiodical printed publication (including music and maps) bound in hard or soft cover, or in loose-leaf format, or a juvenile nonperiodical publication bound in hard or soft cover. Include non-serial government documents. **SERIALS.** A publication issued in successive parts, usually at regular intervals, and as a rule, intended to be continued indefinitely in print format. Serials include periodicals (magazines), newspapers, annuals (reports, yearbooks, etc.), journals, memoirs, proceedings, and transactions of societies; and numbered monographic series. Except for the current volume, count unbound serials when the library has at least half of the issues in a publisher's volume. Government documents and reference tools are often issued as serials. A government document is any publication in book, serial, or other form of library materials that is published by a government agency, such as the publications of federal, state, local, and intergovernmental organizations to which governments belong and appoint representatives, such as the United Nations or the Organization of American States. Serials packaged together as a unit and checked out as a unit are counted as one physical unit.

**6.3 – 6.4 AUDIO MATERIALS.** A generic term for material on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically or electronically, or both. This includes records, audiocassettes, audiocartridges, audiodiscs, talking books, and other sound recordings, such as web-based or downloaded audiobooks and MP3 files.

Report the number of units, both physical and electronic, including duplicates. Items packaged together as a unit are counted as one physical unit. For electronic units, report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC).

**6.5 – 6.6 VIDEO MATERIALS.** These are materials on which pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sounds, using a television receiver or monitor. Video formats may include tape, DVD, CD-Rom, web-based or downloaded files, etc.

Report the number of units, both physical and electronic, including duplicates. Items packaged together as a unit (e.g., two video cassettes for one movie) and checked out as a unit are

counted as one physical unit. For electronic units, report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC).

**6.7 – 6.8 ELECTRONIC BOOKS.** Do not include TexShare holdings. E-books are digital documents (including those digitized by the library), licensed or not, where searchable text is prevalent, and which can be seen in analogy to a printed book (monograph). Include non-serial government documents. E-books are loaned to users on portable devices (e-book readers) or by transmitting the contents to the user's personal computer for a limited time. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired. Report the number of physical or electronic units, including duplicates, for all outlets. For smaller libraries, if volume data are not available, the number of titles may be counted. E-books packaged together as a unit (e.g., multiple titles on a single e-book reader) and checked out as a unit are counted as one unit.

Note: Under this category report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC).

**6.9 – 6.12 DATABASES.** Report the number of licensed databases (including locally mounted or remote, full-text or not) for which temporary or permanent access rights have **been acquired through payment by the library, or by formal agreement with the State Library or a cooperative agreement within the state or region.** A database is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts) with a common user interface and software for the retrieval and manipulation of the data.

Libraries that were a TexShare member in 2008 should report in item **6.10** the number of TexShare databases available to their patrons (The number to report for item 6.10 is **50**).

Libraries that chose to purchase one or more TexSelect databases would have up to an additional 55 options to report in **6.10**. Please specify which TexSelect databases were purchased in a local note.

Note: The data or records are usually collected with a particular intent and relate to a defined topic. A database may be issued on CD-ROM, diskette, or other direct access method, or as a computer file accessed via dial-up methods or via the Internet. Subscriptions to individual electronic serial titles are reported under **Current Electronic Serial Subscriptions (6.16)**. Each database is counted individually even if access to several databases is supported through the same vendor interface.

Report the number of database licenses (subscription or one-time purchases). Each licensed database product is counted individually even if access to several licensed database products is supported through the same interface (e.g., ProQuest, OCLC First Search).

**6.13 – 6.14 COLLECTION TOTALS.** Titles, and volumes, items or physical units.

**6.15 CURRENT PRINT SERIAL SUBSCRIPTIONS.** Report both paid subscriptions and gifts. Do not report number of individual issues. The total number of subscriptions in the library

system, including duplicates, should be reported here. These are print only. Examples are periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series.

**6.16 CURRENT ELECTRONIC SERIAL SUBSCRIPTIONS.** Do not include TexShare holdings. Report the number of current electronic, electronic and other format, and digital serial subscriptions (e-serials, e-journals), including duplicates. Examples include periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series distributed in the following ways: (a) via the Internet (e.g., HTML, PDF, JPEG, or compressed file formats such as zipped files), (b) on CD-ROM or other portable digital carrier, (c) on databases (including locally mounted databases), and (d) on diskettes or magnetic tapes. Electronic serial subscriptions include serials held locally or remote resources that the library has authorization to access, including those available through statewide or consortia agreements. Do not include subscriptions to indexing and abstracting databases that include full-text serial content (e.g., EBSCO Host, ProQuest, OCLC FirstSearch).

## **LOCAL LIBRARY SERVICE**

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**7.1 REFERENCE TRANSACTIONS RECEIVED.** Report the total reference transactions. A reference transaction is an information contact in person, phone, fax, mail, or email or through live or networked electronic reference service. It involves the:

- Knowledge
- Use
- Recommendations
- Interpretation
- Instruction in the use of one or more information sources by a member of the library staff.

The term includes information and referral services including:

- Print and non-print materials
- Machine-readable databases (including computer-assisted instruction)
- Catalog and other holdings records and through communication or referral with
- Other libraries and institutions
- Persons both inside and outside the library.

When a staff member uses information gained from previous use of information sources, report as a reference transaction even if the source is not consulted again.

*Note: When reporting 'reference transactions,' it is vital to not include directional transactions. A directional transaction involves disseminating information that aids customers in the use of the library (i.e., giving instructions for locating staff, library users, physical features, etc., within the library or giving technical, not bibliographic, assistance with machines). Directional transactions use only information resources that describe the library (i.e., schedules, floor plans, handbooks, policy statements).*

**7.2 CIRCULATION TRANSACTION.** The act of lending an item from the library's collection for use usually (although not always) outside the library. This activity includes charging (checking-out), either manually or electronically, and also renewals, each of which is reported as a circulation transaction. Note: Count all materials in all formats that are charged out for use outside the library.

**7.3 ANNUAL CIRCULATION OF CHILDREN’S MATERIALS.** Report the total annual circulation (including renewals) of cataloged and uncataloged materials (in all formats) marked as children’s, whether borrowed by a juvenile, young adult, or adult including renewals. These circulations are also counted in the total circulation transactions (Item #7.2).

**7.4 TOTAL NUMBER OF LIBRARY PROGRAMS.** Report the number of planned events which introduced the group attending to any of the broad range of library services or activities or which directly provided information to participants. Programs may cover use of the library, library services, or library tours. Programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of programs include film showings, lectures, story hours, literacy, English as a second language, citizenship classes, and book discussions.

Count all programs whether held on-or off-site, that are sponsored or co-sponsored by the library, both adult and childrens programs. Exclude programs sponsored by other groups that use library facilities.

If programs are offered as a series, count each program in the series. For example, a film series offered once a week for eight weeks should be counted as eight programs.

Note: Exclude library activities delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, resume writing assistance, homework assistance, and mentoring activities.

**7.5 TOTAL ATTENDANCE AT PROGRAMS AND PRESENTATIONS BY LIBRARY.** Report actual number of persons attending programs and presentations sponsored by the library. Programs need not take place in the library, but the library must be the primary contributor in the planning or presentation. Examples are book talks, tours, and film programs.

**7.6 TOTAL NUMBER OF CHILDREN’S PROGRAMS.** A children’s program is any planned event for which the primary audience is children and which introduces the group of children attending to any of the broad range of library services or activities for children or which directly provides information to participants. Children’s programs may cover use of the library, library services, or library tours. Children’s programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Example of these types of programs include story hours and summer reading events.

Count all children’s programs, whether held on- or off-site that are sponsored or co-sponsored by the library. Do not include children’s programs sponsored by other groups that use library facilities.

If children’s programs are offered as a series, count each program in the series. For example, a story hour offered once a week, 48 weeks a year should be counted as 48 programs. Exclude library activities for children delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.

This figure is a subset of the Total Number of Library Programs (7.4). Output Measures for Public Library Services to Children: A Manual of Standardized Procedures (ALA, 1992) defines children as persons age 14 and under.

**7.7 TOTAL ATTENDANCE AT CHILDREN'S PROGRAMS.** This is the total annual count of the attendance, both adults and children, at programs that have a portion or all of their content targeted at persons 14 years of age and younger. This total is included in the number of persons attending programs (Item #7.5).

**7.8 NUMBER OF LIBRARY VISITS.** This is the annual total of the number of people entering the library. It is also known as the gate count.

**7.9 REGISTERED BORROWERS.** A registered borrower is a library user who has applied for and received an identification number or card from the public library that has established conditions under which the user may borrow library materials and gain access to other library resources. (Output Measures for Public Libraries, 2<sup>nd</sup> edition). **Note: Files should have been purged within the past three (3) years.**

**7.10 LONG-RANGE PLAN.** Report whether or not the library is operating with a long-range plan in place. The library's governing board shall approve this plan. It must be reviewed and updated at least every five years and must include a collection development element.

## **LIBRARY STAFFING AND SALARIES**

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Report figures as of the last day of the fiscal year. Include all positions funded in the library's budget whether those positions are filled or not.

**8.1 –8.4 PAID FULL-TIME EQUIVALENT EMPLOYEES (FTE).** Forty hours per week is one FTE. To compute full-time equivalents (FTE) of employees in any category, take the number of hours worked per week by all employees and divide it by 40.

**8.1 PAID LIBRARIAN WITH MASTER'S DEGREE.** Persons reported under this category usually do work that requires professional training and skill in the theoretical or scientific aspect of library work, or both, as distinct from its mechanical or clerical aspect. The educational requirement is a master's degree from a library education program accredited by the American Library Association (ALA). NCATE (National Council for Accreditation of Teacher Education) is not considered ALA accreditation for public library librarians.

**8.2 PAID LIBRARIAN.** Persons reported under this category do paid work that usually requires some professional training and skill in library work that might include mechanical or clerical aspects.

**8.3 ALL OTHER PAID STAFF.** Includes all other persons paid by the library budget including plant operation, security, and maintenance staff.

**8.4 TOTAL PAID STAFF.** This is the sum of Total Librarians and All Other Paid Staff (see definition above).

**8.5 VOLUNTEER HOURS.** Indicate the total number of hours that were worked in the library by persons who were not on the library's payroll. Include volunteers, community service persons and those paid from non-library programs, such as Green Thumb.

**8.6 HEAD LIBRARIAN'S SALARY.** Report the annual rate of pay for the head librarian (director) at the end of your fiscal year. Include merit, longevity, and other payments made

directly to the individual. If the position is vacant, report the annual salary that you expect to pay when someone is hired.

**8.7 HEAD LIBRARIAN'S HOURS.** Report the number of hours per week that the head librarian is employed in library duties.

**8.8 CONTINUING EDUCATION.** Continuing education activities that meet qualitative standards for which the applicant can supply documentation of participation, duration, and relevance to the operation of a library.

## **RESOURCE SHARING**

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**9.1-9.4 INTERLIBRARY LOANS.** An item of library material, or a copy of the material, is made available by one autonomous library to another upon request. The libraries involved in interlibrary loan are not under the same library administration. Report both "specific item" and "subject request" in this section.

**9.3 INTERLIBRARY LOANS RECEIVED FROM.** These are library materials, or copies of the materials, received by one autonomous library from another upon request. The libraries involved in interlibrary loans are not under the same library administration.

**9.4 INTERLIBRARY LOANS PROVIDED TO.** These are library materials, or copies of the materials, provided by one autonomous library to another upon request. The libraries involved in interlibrary loans are not under the same library administration.

## **INTERNET AND ELECTRONIC SERVICES**

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**10.1-10.2 ACCESS TO THE INTERNET.** Does your library offer access to the Internet for use by staff and the general public?

**10.3 TERMINALS TO THE INTERNET.** Report the number of Internet terminals (personal computers, dumb terminals, and laptops), whether purchased, leased or donated, used by the general public in the library.

**10.4 PUBLIC INTERNET USE.** Total number of individuals that used Internet computers in the library during the last year. If the computer is used for multiple purposes (Internet access, word-processing, OPAC, etc.) and Internet users cannot be isolated, report all usage. A typical week or other reliable estimate may be used to determine the annual number. Sign-up forms or Web-log tracking software also may provide a reliable count of users.

*Note: The number of users may be counted manually, using registration logs. Count each user that uses electronic resources, regardless of the amount of time spent on the computer. A user who uses the library's electronic resources three times a week would count as three customers. Software such as "Historian" can also be used to track the number of users at each public terminal. In the case of a user visit to a library website, a user who looks at 16 pages and 54 graphic images counts as one visit.*

**10.5 TRAINING.** How many persons were trained in the use of electronic resources in formal settings and/or informal settings? A formal setting can be a class in computer hardware or software usage, instruction on how to access Internet or email, the library online catalog, how to search electronic databases or CD-ROMs, etc. A formal setting can be small or large classes in instruction on the use of any electronic resource. An informal setting can include one-on-one

instruction computer hardware or software usage, instruction on how to access Internet or email, the library online catalog, how to search electronic databases or CD-ROMs, etc.

## **LIBRARY HOURS**

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**11.1 PUBLIC SERVICE HOURS - ANNUAL TOTAL.** The purpose of this question is to find out how many overlapping hours of library service were available to your patrons last year. This total should be reduced for any hours that any of the facilities were closed to the public (e.g., holidays, weather emergencies, staff development days, construction, repairs, etc.). Report every hour that any facility is open to the public during all of last year.

**SCHEDULE OF HOURS.** These hours should reflect the time that the library is open to the public for general library use. Report the most current schedule available.

**11.21 PUBLIC SERVICE HOURS - WEEKLY TOTAL.** **If your library does not have any branches,** this answer will be the same as your answer to 11.12. Libraries with branches should report the total number of unduplicated hours per week the libraries are open. Example: Main is open M-F 8-5; the branch is open M-F 9-6. This library would be open 10 unduplicated hours per day. The total for five days would equal 50 hours per week.

## **SYSTEM MEMBERSHIP APPLICATION FORM**

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Complete the "System Membership Application Form" only if the library is seeking initial or continuing system membership.

If the library wishes to be qualified as a first-time member of the Texas Library System based on its budget for the current fiscal year, the library should submit its operating budget. The operating budget would be for the fiscal year in which January 1, 2008 falls. Follow the instructions pertaining to Items 3.1-5.13 in order to submit the budgeted information. Identify the budgeted amounts that are to be derived from city, county, school district, and other local sources.

## **DEADLINE FOR SUBMISSION OF THIS REPORT**

Texas Administrative Code, Title 13, Chapter 1, Rule §1.85 regarding the Annual Report.

*A public library shall file a current and complete annual report with the Texas State Library and Archives Commission by **April 30**. Revisions to the annual report which would affect membership status for the next fiscal year will not be accepted after July 31. Staff vacancies that occur after the report is filed shall not adversely affect applications for system membership in the next fiscal year. Staff vacancies that occur prior to filing the report which affect system membership must be filled and reported prior to July 31. Willful falsification of annual reports shall cause the library to be disqualified for one year in the first instance and disqualified for three years in the second instance.*

If you have any questions about this survey, please write or call your System Coordinator or contact Bell Clarke at the following addresses: Library Development Division; Texas State Library and Archives Commission; Box 12927; Austin, Texas 78711-2927; (512) 463-5466; [bell.clarke@tsl.state.tx.us](mailto:bell.clarke@tsl.state.tx.us)

The ten System Coordinators are also available to answer your questions or to refer problems to the State Library. You may contact them at the following locations:

Kathryn Sturtz, System Coordinator  
**Alamo Area Library System**  
San Antonio Public Library  
600 Soledad Street  
San Antonio, Texas 78205-1200  
(210) 207-2612

John Pecoraro, System Coordinator  
**Big Country Library System**  
Abilene Public Library  
202 Cedar Street  
Abilene, Texas 79601-5793  
(325) 676-6021

Pat Tuohy, Executive Director  
**Central Texas Library System**  
1005 West 41<sup>st</sup> Street  
Austin, Texas 78756  
(512) 583-0704

Elizabeth Swan, System Coordinator  
**Houston Area Library System**  
Houston Public Library  
500 McKinney Street, Suite 400  
Houston, Texas 77002-2534  
(832) 393-1397

Adam Wright, Executive Director  
**North Texas Regional Library System**  
6320 Southwest Blvd, Suite 101  
Fort Worth, Texas 76109  
(817) 377-4440

Connie Moss, System Coordinator  
**Northeast Texas Library System**  
Nicholson Memorial Library  
4845 Broadway Blvd.  
Garland, Texas 75043  
(972) 205-3852

Alice Nixon, System Coordinator  
**South Texas Library System**  
Corpus Christi Public Library  
805 Comanche Street  
Corpus Christi, Texas 78401-2715  
(361) 880-7060

Jan Tortoriello  
**Texas Panhandle Library System**  
Amarillo Public Library  
PO Box 2171  
Amarillo, Texas 79189-2171  
(806) 378-4216

Barbara Valle, System Coordinator  
**Texas Trans-Pecos Library System**  
El Paso Public Library  
501 North Oregon  
El Paso, Texas 79901-1195  
(915) 543-5464

Nancy Hill, System Coordinator  
**West Texas Library System**  
Lubbock Public Library  
1306 9th Street  
Lubbock, Texas 79401-2708  
(806) 775-2854

# ANNUAL REPORT FOR LOCAL FISCAL YEAR 2008

*This report is due at the Texas State Library and Archives Commission by March 31, 2009. All data applies to your library's 2008 fiscal year.*

**1.1** Library Name \_\_\_\_\_ **1.2** County \_\_\_\_\_  
(As you wish it to appear in the directory)

**1.3** Mailing Address \_\_\_\_\_ - \_\_\_\_\_  
Street or P.O. Box **1.4** city **1.5** zip code **1.6** 4 digit zip ext.

**1.7** Street Address \_\_\_\_\_ - \_\_\_\_\_  
(if different) Street **1.8** city **1.9** zip code **1.10** 4 digit zip ext.

**1.11** Phone \_\_\_\_\_ **1.12** Listed # Yes \_\_\_ No \_\_\_ **1.13** Telefax \_\_\_\_\_  
area code number area code number

**1.14** E-mail Address (administrative) \_\_\_\_\_

**1.15** E-mail Address (library's) \_\_\_\_\_

**1.16** Web Address (Internet) http:// \_\_\_\_\_

Head Librarian \_\_\_\_\_ Contact Person \_\_\_\_\_  
**1.17** first name **1.18** last name **1.19** first name **1.20** last name

Board Chair \_\_\_\_\_  
**1.21** first name **1.22** last name

**1.23** Mailing Address \_\_\_\_\_ - \_\_\_\_\_  
Street or PO Box **1.24** city **1.25** zip code **1.26** zip extension

Friends President \_\_\_\_\_  
**1.27** first name **1.28** last name

**1.29** Mailing Address \_\_\_\_\_ - \_\_\_\_\_  
Street or PO Box **1.30** city **1.31** zip code **1.32** zip extension

## Outlets and Users

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**2.1** Number of branch libraries \_\_\_\_\_ **2.2** Number of bookmobiles in use \_\_\_\_\_

**2.3** Has the main library building(s) or any branch library been renovated, expanded, or new construction completed within the period covered by this report? \_\_\_\_\_ Yes \_\_\_\_\_ No

**2.4** What is the square footage of the main library? \_\_\_\_\_

## Categories of Expenditures

### SALARIES AND WAGES

Library Employees	3.1		
-------------------	-----	--	--

### EMPLOYEE BENEFITS

Library Employees	3.2		
-------------------	-----	--	--

Subtotal Wages and Benefits (Total of 3.1 through 3.2)

3.3

### COLLECTION

Print Materials	3.4		
-----------------	-----	--	--

Materials in Electronic Format	3.5		
--------------------------------	-----	--	--

Other Materials	3.6		
-----------------	-----	--	--

Subtotal Collection (Total of 3.4 through 3.6)

3.7

### MISCELLANEOUS

Other Operating Expenses (include TexShare fees)	3.8		
--	-----	--	--

<b>Total Direct Operating Expenditures</b> (Total of 3.3 + 3.7 + 3.8)	3.9		
---	-----	--	--

Indirect Costs (Optional – attach documentation if claimed)	3.10		
---	------	--	--

<b>Total Operating Expenditures</b> (Total of 3.9 + 3.10)	3.11		
---	------	--	--

Capital Outlay (Do not include expenditures reported above)	3.12		
---	------	--	--

Does your library receive indirect support from your local government? These are normal library operating expenditures not part of the library's budget, but paid for on behalf of the library by a local government agency. These costs may include, among others, janitorial services, purchasing, accounting, grounds maintenance, utilities, insurance, telecommunications, or payroll services.

3.13 \_\_\_\_\_ Yes

\_\_\_\_\_ No

### Local Financial Effort

Of the amount shown in Library Collection Expenditures (Item 3.7),  
how much was expended from local funds only? 4.1 \_\_\_\_\_

Of the amount shown in Total Operating Expenditures (Item 3.11),  
how much was expended from

- Local funds only (include government sources)? 4.2 \_\_\_\_\_

- Local government sources only? 4.3 \_\_\_\_\_

Note: See Instructions for definitions of "local funds" and "local government sources."

## Library Income By Source

"Operating Income" is money received by the library for the current and recurrent costs of operation, including grants for special projects. "Capital Income" is money intended for major capital expenditures, construction, renovation, endowment fund deposits, or other extraordinary items. (Exclude interlibrary loan and system operation grants from both of these categories as well as indirect costs).

	OPERATING INCOME	CAPITAL INCOME
City, Cities, or Library District	5.1 _____	5.14 _____
County or Counties	5.2 _____	5.15 _____
School Districts	5.3 _____	5.16 _____
<b>Subtotal of local government income</b>	<b>5.4</b> _____	
Loan Star Libraries grant award	5.5 _____	5.17 _____
Other State Funds	5.6 _____	5.18 _____
Federal Library Services & Technology Act Funds	5.7 _____	5.19 _____
Other Federal Funds	5.8 _____	5.20 _____
<b>Subtotal of federal operating income</b>	<b>5.9</b> _____	
Foundation & Corporate Grants	5.10 _____	5.21 _____
Other Local Sources (interest, fines, donations from individuals)	5.11 _____	5.22 _____
<b>Subtotal of other operating income</b>	<b>5.12</b> _____	
<b>TOTAL INCOME</b>	<b>5.13</b> _____	<b>5.23</b> _____

If the library received funds from a city or county **other than** the one in which the library is located, list the appropriate cities or counties separately and indicate the total of the funds received from each city or county.

Cities or Counties Funding the Library	Amount Received
5.24 _____	5.25 \$ _____

## LIBRARY COLLECTION

Does the library have a catalog of its holdings available to the public that is searchable, either manually or electronically, at a minimum by author, title, and subject? **6.0** Yes \_\_\_ No \_\_\_

	Titles	Volumes, Items or Physical Units
Books and Serials (in print)	6.1 _____	6.2 _____
Audio Materials	6.3 _____	6.4 _____
Video Materials	6.5 _____	6.6 _____
Electronic Books (Do not include TexShare holdings)		6.8 _____
Local Licensed Databases		6.9 _____
State Library Licensed Databases (include TexShare and TexSelect holdings)		6.10 _____
Other Licensed Databases (include cooperative agreements or consortia within state or region)		6.11 _____
<b>Licensed Databases SUBTOTAL (6.9+6.10+6.11)</b>		<b>6.12</b> _____
<b>COLLECTION TOTALS</b>	<b>6.13</b> _____	<b>6.14</b> _____

Number of subscriptions currently received (in print format) **6.15** \_\_\_\_\_  
 Number of electronic subscriptions currently received **6.16** \_\_\_\_\_

(Do not include TexShare holdings)

## **LOCAL LIBRARY SERVICES**

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Number of reference transactions received by your library **7.1** \_\_\_\_\_  
 Number of library circulation transactions **7.2** \_\_\_\_\_  
 Number of circulations of children's materials (This is part of #7.2.)  
 (children's materials in all formats, excluding young adult materials) **7.3** \_\_\_\_\_  
 Total number of library programs provided by the library **7.4** \_\_\_\_\_  
 Total attendance at programs/presentations  
 provided by the library **7.5** \_\_\_\_\_  
 Total number of children's programs provided by the library **7.6** \_\_\_\_\_  
 Total (juvenile and adult) attendance at children's programs  
 provided by the library (This is a subset of #7.5) **7.7** \_\_\_\_\_  
 Number of library visits (gate count) **7.8** \_\_\_\_\_  
 How many registered borrowers do you have? **7.9** \_\_\_\_\_  
 Does the library have a long-range plan? **7.10** Yes \_\_\_ No \_\_\_  
Plan approved by the library's governing board must be reviewed and updated at least every five years and must include a collection development element.  
 Does the library have available a photocopier for use by staff? **7.11** Yes \_\_\_ No \_\_\_  
 Does the library have available a photocopier for use by the public? **7.12** Yes \_\_\_ No \_\_\_

## **LIBRARY STAFFING AND SALARIES**

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Include all positions funded in the library's budget whether those positions are filled or not. Report figures as of the last day of the fiscal year. Forty hours per week is one full-time equivalent (FTE). Divide staff hours worked per week by 40. Enter total FTE's.

Paid Persons Holding Title of Librarian

	#FTE's
• with master's degree from program accredited by ALA	<b>8.1</b> _____
• other persons holding title of librarian	<b>8.2</b> _____
All other paid staff	<b>8.3</b> _____
Total library paid staff	<b>8.4</b> _____

How many hours last year did volunteers (including community service, Green Thumb, etc.) work in your library? **8.5** \_\_\_\_\_

What was the Head Librarian's annual rate of salary? **8.6** \$ \_\_\_\_\_

How many hours per week is the Head Librarian currently employed in library duties? **8.7** \_\_\_\_\_ hours per week

Has the Head Librarian obtained a minimum of 10 hours of continuing education credits within this reporting period?

Continuing education activities that meet qualitative standards for which the applicant can supply documentation of participation, duration, and relevance to the operation of a library.

**8.8** Yes \_\_\_ No \_\_\_

## RESOURCE SHARING

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Questions 9.1 and 9.2 are part of the library's accreditation. They are based on the following rule.

13.TAC 1.83: A public library shall offer to borrow materials via the interlibrary loan resource sharing service for persons residing in the library's designated service area. A library shall also participate in the interlibrary loan resource sharing service by lending its materials to other libraries, as requested. The library governing board may adopt policies regarding materials available for loan and the length of the loan, the good standing of the borrower, and other relevant issues; these policies must be posted on the library system's web site.

Is your library willing to borrow materials for your patrons? **9.1** Yes\_\_\_ No\_\_\_

Is your library willing to lend materials to another library for their patrons? **9.2** Yes\_\_\_ No\_\_\_

Please report number of loans actually received or actually loaned, even if that number is zero.

**Interlibrary loan** requests (exclude informational requests)

How many loans were **received from** other libraries? **9.3** \_\_\_\_\_

How many loans were **provided to** other libraries? **9.4** \_\_\_\_\_

## INTERNET AND ELECTRONIC SERVICES

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Does your library have a computer with Internet access for the use by staff?

**10.1** \_\_\_ Yes \_\_\_ No

Does your library have a computer with Internet access for the use by the public?

**10.2** \_\_\_ Yes \_\_\_ No

How many terminals (PC, dumb terminals, laptops, etc.) are used to access the Internet by general public? **10.3** \_\_\_\_\_

What were the total number of users of public internet computers in the library during the year? This is for in-library use only:

**10.4** \_\_\_\_\_

How many persons were trained in the use of electronic resources (formal and informal):

**10.5** \_\_\_\_\_

## LIBRARY HOURS

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Total number of hours during the year that the library was open. **11.1** \_\_\_\_\_ per year

The purpose of this question is to find out how many overlapping hours of library service were available to your patrons last year. This total should be reduced for any hours that any of the facilities were closed to the public (e.g., holidays, weather emergencies, staff development days, construction, repairs, etc.). Report every hour that any facility is open to the public during all of last year.

The local fiscal year covered by this report began (**11.2**) \_\_\_\_\_ and ended (**11.3**) \_\_\_\_\_.



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## **DEADLINE FOR SUBMISSION OF THIS REPORT**

Texas Administrative Code, Title 13, Chapter 1, Rule §1.85 regarding the Annual Report.

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One completed application form should be returned to the Library Development Division, Texas State Library and Archives Commission, PO Box 12927, Austin, Texas 78711-2927.

**QUESTIONS:** If you have any questions about this survey, please write or call your System Coordinator or contact Bell Clarke at the following address: Library Development Division; Texas State Library & Archives Commission; PO Box 12927; Austin, Texas 78711-2927; 512/463-5466; fax 512/463-8800; [bell.clarke@tsl.state.tx.us](mailto:bell.clarke@tsl.state.tx.us)

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**SYSTEM MEMBERSHIP APPLICATION FORM**  
Authorization to Apply for New or Continuing System Membership

LIBRARY NAME: \_\_\_\_\_ CITY \_\_\_\_\_

*This Authorization for application should be completed only for the following reasons:*

- Your library is applying for new membership in the Texas Library System
- Your library wishes to continue its membership in the Texas Library System for the upcoming state fiscal year (SFY2010).

**All signatures are necessary.** Current members of the Texas Library System **MUST** obtain all necessary signatures if they wish to continue their System membership during SFY2010.

Signatures of city secretaries, county clerks, and so forth **are not valid** substitutions for the signatures of mayors, city managers, or county judges.

*By signing this form, the applying library is certifying that the information presented in its Annual Report for Local Fiscal Year 2008 is complete and accurate. Please mail form to: Texas State Library, Library Development Division, PO Box 12927, Austin, TX 78711-2927.*

**A U T H O R I Z A T I O N**

\_\_\_\_\_  
SIGNATURE of Mayor, City Manager, District Board  
Chair or County Judge, or School Superintendent  
(Circle applicable one)

\_\_\_\_\_  
Typewritten or printed name

\_\_\_\_\_  
SIGNATURE of Head Librarian

\_\_\_\_\_  
Typewritten or printed name

\_\_\_\_\_  
SIGNATURE of Library Board Chair

\_\_\_\_\_  
Typewritten or printed name

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