

WHAT GOES WHERE?

SD PUBLIC LIBRARIES SURVEY FY2024

Report statistics for calendar year 2024

Digital / Downloadable / Streaming Materials

Please note that the IMLS has made changes to the reporting of e-materials in the areas of holdings (how many) and usage (collection use). E-materials (digital materials) can be accessed online from an electronic device. Changes include the following:

Holdings - We no longer collect data on holdings (how many items are in the collection) for any e-materials collections, for example your Overdrive collections, databases, etc.

Circulation - We continue to collect data on circulation (checkouts) of e-materials that require user authentication and have a limited period of use. These e-materials include ebooks, e-serials, e-audio, and e-video. Count all checkouts, including renewals. See the p.3 flowchart for assistance.

Database use - We no longer collect usage data on e-materials that are examined or downloaded and kept by the user and do not have a set circulation period.

Access – You will be asked to report whether your library’s e-materials collections are provided (paid for) solely by the library, through a cooperative agreement, or by the State Library or other state agency. The latter choice has been pre-filled for you based on the access to the State Library-provided e-resources for all public libraries.

South Dakota Titles To Go (ebooks, magazines, audiobooks)

Report circulation (checkouts) in appropriate fields [F05.a/b/c].

Report “Yes” for access in appropriate fields [F07.b / F08.b / F09.b].

Report expenditures for digital materials [E05].

Black Hills Library Consortium (ebooks, magazines, audiobooks)

Report circulation (checkouts) in appropriate fields [F05.a/b/c].

Report “Yes” for access in appropriate fields [F07.b / F08.b / F09.b].

Report expenditures for digital materials [E05].

Overdrive (not a consortium) **and Overdrive Advantage** (ebooks, magazines, audiobooks, video)

Report circulation (checkouts) in appropriate field(s) [F05.a/b/c/d].

Report “Yes” for access in appropriate field(s) [F07.a / F08.a / F09.a / F10.a].

Report expenditures for digital materials [E05].

Freegal (digital music database)

Do not report usage because items don’t have a set circulation period.

If service provided solely by library, report “Yes” for access in F09.a.

If service provided via a consortium, report “Yes” for access in F9.b.

Report expenditures for digital materials [E05].

Hoopla (ebooks & comics, magazines, audiobooks & music, video)

Report circulation (checkouts) in appropriate field [F05.a/b/c/d],

If service provided solely by library, report “Yes” for access in appropriate field(s) [F07.a / F08.a / F09.a / F10.a].

If services provided via a consortium, report “Yes” for access in appropriate field(s) [F07.b / F08.b / F09.b / F10.b].

Report expenditures for digital materials [E05].

Kanopy (streaming video)

Report circulation (plays) [F05.d].

If service provided solely by library, report “Yes” for access in F10.a.

If service provided via a consortium, report “Yes” for access in F10.b.

Report expenditures for digital materials [E05].

TumbleBooks (digital ebooks database)

Do not report usage because items don't have a set circulation period.
 If service provided solely by library, report "Yes" for access in F07.a.
 If service provided via a consortium, report "Yes" for access in F7.b.
 Report expenditures for digital materials [E05].

Digitized newspaper collections, yearbooks, other periodic digital publications

Do not report usage because items don't have a set circulation period.
 If service provided solely by library, report "Yes" for access in F08.a
 If service provided collectively or via a consortium of libraries, report "Yes" for access in F8.b
 Report expenditures for digital materials [E05].

Physical Materials

Note: Circulation of physical materials has been moved to Section F on the annual report form.

AWE Early Literacy Stations

Report in Holdings [F01.e].
 Expenditures [E06].

Ebook readers – Nooks, Kindles, Sony Readers, etc. *that are circulated*

Report in Holdings [F01.e].
 Circulation [F02.e] *if* you check them out preloaded with ebooks/audiobooks count as 1 circulation transaction each time checked out by patron (do not count each title on the device).
 Expenditures [E06] *if* purchased in reporting period

Game devices – Leapsters, gaming consoles

Report in Holdings [F01.e].
 Circulation (if you lend them) [F02.e].
 Expenditures [E06] *if* purchased in reporting period

Games (electronic) – Wii, Playstation, Xbox, Nintendo DS, etc.

Report in Holdings [F01.e].
 Circulation [F02.e]
 Expenditures [E06] *if* purchased in reporting period

Hotspots lent to patrons

Report in Holdings [F01.e].
 Circulation [F02.e]
 Expenditures [E06]

Laptops and tablet devices

Where you report these depends on what you do with them:
 Devices used in-house by public to access the library's Internet network: Report in Internet [G22] and Sessions [G23], Expenditures [E08] if purchased in reporting period.
 Devices lent to patrons to use at home: Report in Holdings [F01.e], Circulation [F02.e], Expenditures [E06]

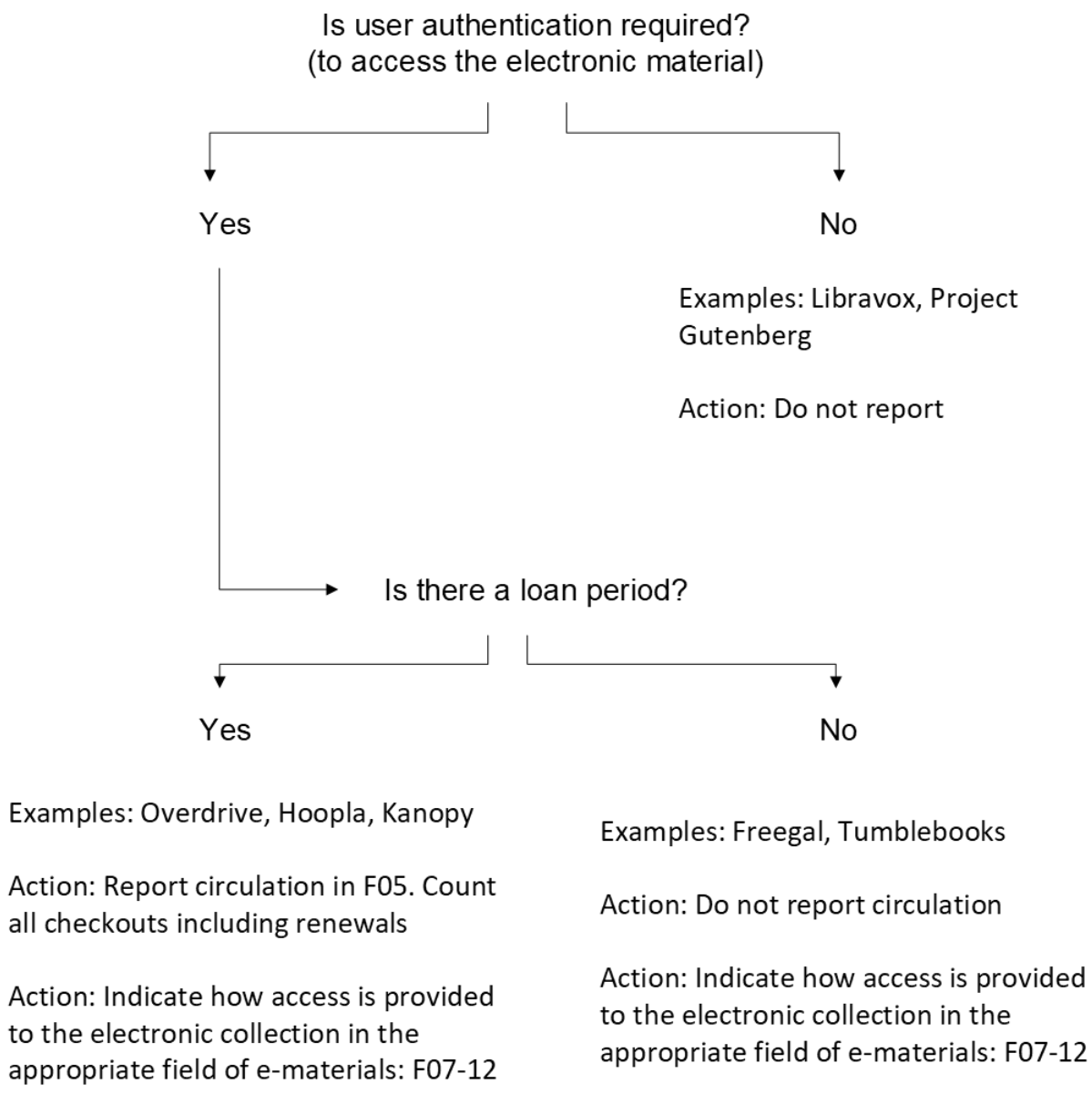
Playaway audiobooks

Report in Holdings [F01.c]
 Collection Use [F02.c]
 Expenditures [E06]

Playaway Views

Report in Holdings [F01.d],
 Collection Use [F02.d]
 Expenditures [E06]

E-materials: Flowchart for reporting circulation and how access is provided



Staff

Fill-ins / Replacements

Not counted as library staff in Section C if they do not work at the same time as the staff members they are replacing.

Report any wages paid out in Expenditures [E01].

Volunteers

Include advisory board members, storytellers, book sale personnel, people who contribute to library operations [C15].

Volunteer hours: Count the average number of hours per week contributed by *all* volunteers [C16].

Income and Expenditures

Jump Start stipend (for hosting libraries)

Report in State Government Income [D08].

Report in Other Operating Expenditures [E08].

Stephanie Miller-Davis grants

Report in Other Operating Revenue [D10].

Report in the appropriate expenditure category/categories [E04-08].

Note: Expenditures for performer fees should be reported in Other Operating Expenditures [E08].

Grants

Report grants in the appropriate income line [D01-D10] if used for operating expenses.

If the grant was used for large one-time purchases, then report in the appropriate Capital Income category [D12-15] instead.

E-rate - *Report only if the information is supported by expenditure documents (such as invoices, contracts, payroll records, etc.). E-rate funds are not federal funds.*

Report Other Operating Revenue [D10] if library is reimbursed by the vendor.

Report Category 1 reimbursements in Other Operating Expenditures [E08]; report Category 2 reimbursements as Capital expenditures on technology [E11].

ILS / Library automation system

Report maintenance fees in Other Operating Expenditures [E08].

Expenditures related to setting up a *new* library automation system should be reported in Capital expenditures on technology [E11].

Computer hardware and software that supports library operations

Report in Other Operating Expenditures [E08]. If it's a large, one-time expense, report instead in Capital expenditures on technology [E11].

Internet, WiFi, and fees for services that link to external networks

Report in Other Operating Expenditures [E08].

Contracts for services – costs of operating/maintaining physical facilities, fees paid to consultants, auditor, architect, attorney, etc.

Report in Other Operating Expenditures [E08].

Conference fees, travel, training, related expenses

Report in Other Operating Expenditures [E08].

Furnishings & equipment – repair or replacement

Report in Other Operating Expenditures [E08].

Binding & library supplies

Report in Other Operating Expenditures [E08].

Major building and renovation expenses, new vehicles, one-time major projects

Report all revenue used for site acquisition; new buildings; additions or renovation of library buildings.

Initial purchases of furnishings, equipment, initial collections (print, non-print, electronic) for new buildings/renovations; computer hardware/software to support library operations, link to networks, run information products. Report in Capital Expenditures [E10-12].

Report revenue used for these items under Capital Income [D12-15].

EXCLUDE revenue used for replacement or repair.

Landscaping Expenses

Report in Capital expenditures on facility [E10]

New carpet, moving walls, painting

Report in Capital expenditures on facility [E10]

New printer, copier, fax

Report in Capital expenditures on technology [E11] unless the purchase is replacing old or broken equipment, then report in Other Operating Expenditures [E08]

Reference Transactions

Reference transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. [G03]

Do NOT count directional transactions, for example:

“Where is the reference librarian? Where is Susan Smith? Where is the rest room? Where are the 600s? Can you help me make a photocopy?”

Checking items out to patrons *does not* count as a reference transaction.

DO count information and referral service and unscheduled individual instruction, for example:

Providing assistance to users of public computers, providing assistance & instruction with library catalog or databases, providing individual training/assistance such as how to download ebooks on a user’s device, readers’ advisory.

Library Programs

Counting Program Sessions: Count all programs [G04, 06, 08, 10,12] that are onsite, offsite or livestreamed, that are sponsored or co-sponsored by the library. Exclude programs sponsored by other groups that use the library facility. You may count visits to schools to promote summer reading programs as a program. Each classroom visit is a program session. Be sure to count attendees for reporting program attendance [G05, 07, 09, 11, 13].

Live (synchronous) programs hosted online

Report in Synchronous Virtual Program Sessions and attendance in row “c” fields of the appropriate age group [G04-G13]

Recordings of programs originally hosted online

If the library hosted a live program online and left the content up to be viewed on-demand, then report program in Recorded Program Presentations [G16.a]. Views of the program (after it is no longer live) should be reported in Views of Recorded (Asynchronous) Program Presentations [G16.b]. You may record views for the first 30 days after the program is posted. EXCLUDE programming or content from another entity that is shared via social media, but not sponsored or co-sponsored by the library.

Craft kits distributed, self-guided story walks, social media challenges, contests, scavenger hunts, virtual escape rooms, 1000 Books Before Kindergarten, Bingo Boards, etc.

Report how many activities were offered in Self-directed Activities [G18.a] and how many patrons took part in the activities [G18.b].

EXCLUDE activities like board games, puzzles, Legos, etc. left out for free play. The library must have an investment in activities reported.

Book Clubs

If sponsored/organized/conducted by the library, may be counted as a program.

Count each meeting as a program. Book club meets 10 times, counts as 10 program sessions. Count as synchronous program in the appropriate age group and program format [G04, 06, 08, 10,12].

Count the number of attendees at each session and report in the same age category as the program was reported [G05, 07, 09, 11, 13].

Storytimes, Summer Reading Program and other program series

Count each time the group meets as a program session (see above).

Count the number of attendees at each session in the same age category as the program was reported.

Adults attending children's or YA programs

Do a headcount of all audience members, regardless of age, for the program. All attendees should be counted in the same age category that the program session was reported.

Family programs

Report events that are appropriate for any age group in the General Interest age categories [G12 and G13].

One-to-one programs [G17].

Count each one-to-one session. *Only* count planned program activities. All other one-to-one help count in Reference Transactions [G03].

Examples include: Services to the homebound, test proctoring, mentoring programs.

Booths at community events, handing out treats at holiday events, etc.

Do not count as programs. It is a good idea, however, to track participation for sharing library's outreach activities with stakeholders.

Special Instructions for School/Public Combo Libraries

School / Public Combo Libraries

General rule: Report anything that impacts the operation of the public library. Your submission may include statistics from both school and public library activities, depending on your library's schedule and staffing situation. You will report statistics for the school library in the School Libraries Survey that runs April/May.

Hours – Section A

Report only the hours that the library is open to the public.

Personnel – Section C

Include staff who serve the public. For example, if you are the only librarian, then report your total hours and salary. If the school library staff do not serve the public, then do not include them in personnel.

Operating Income – Section D

Include all income and that keeps the library running.
Include school income that goes into library operation expenses [D03].

Operating Expenses – Section E

Staff Expenditures – report only for staff included in Section C.
Collection Expenditures – report only for items available to the public.
Operating Expenditures – include all expenses that keep the library open and running.

Holdings – Section F

Report all items that can be checked out by the public. Do not include items from the school's collections that are not available to the public.

Circulation – Section F

If you cannot separate public and school circulation, then it is acceptable to report both.

Programs – Section G

Do not count class visits to the library unless they involve some type of library-sponsored activity or event. Examples of when you should count class visits include storytimes, craft/makerspace programs, group instruction in research skills and using library media. Class visits to obtain library materials are counted in the School Libraries Survey that runs March/April.