

FY 22 Public Libraries Survey

Data Elements Guide

Montana State Library

September 1, 2022

General Information

Reporting period – July 1, 2021 to June 30, 2022

Due November 30, 2022

Question numbers correspond to survey questions. Public Libraries Survey (PLS) data element numbers are included for Montana State Library use. Many fields will be populated using authoritative data from previous surveys or statewide databases. In some cases, prefilled responses will be locked to prevent inadvertent changes. Please contact Rebekah Kamp, Data Coordinator with questions at rkamp@mt.gov. For fields that automatically total it may be necessary to click SAVE to see totals.

Definitions & Instructions

Section 1 – Contact Information

1.1 LIBRARY NAME

Populated and locked by Montana State Library. The full legal name of the library. Do not use acronyms. PLS 152

1.2 FSCS ID & EXTENSION

Populated and locked by Montana State Library. The identification code assigned by IMLS to the reporting library. PLS 150

1.3 CONTACT NAME AND POSITION

The name and position of the staff member completing the PLS.

1.4 CONTACT'S EMAIL ADDRESS

The email address of the staff member completing the PLS. Be sure it is formatted: person@library.xyz. This will be the method of contact if there are questions about the survey.

1.5 STREET ADDRESS

Populated and locked by Montana State Library. The complete street address of the library. If the library has branches, report the address of the central library only. PLS 153

1.6 MAILING ADDRESS

Populated and locked by Montana State Library. The mailing address of the library. Note: This can be a post office box or general delivery address. PLS 157

1.7 CITY

Populated and locked by Montana State Library. The city or town in which the library is physically located. PLS 154

1.8 STATE

Populated and locked by Montana State Library.

1.9 ZIP

Populated and locked by Montana State Library. The standard five-digit postal zip code for the street address of the library. PLS 155

1.10 COUNTY

Populated and locked by Montana State Library. The county in which the library is physically located. PLS 161

1.11 PHONE

Populated and locked by Montana State Library. The telephone number of the library, including area code. No spacing or punctuation. PLS 162

1.12 FAX NUMBER

If you have a fax machine, enter the fax number even if it is the same as the main phone number.

1.13 LIBRARY HOME PAGE

Enter the URL of the library website home page. Do not include a library page that is part of a city or county website.

Section 2 – Population

2.1 SERVICE AREA POPULATION

Populated and locked by Montana State Library. This is the number of people your library services as determined by the State Library in accord with the service population formula stated in 10.102.4003 Administrative Rules of Montana. PLS 208

Section 3 – General information

3.1 INTERLIBRARY RELATIONSHIP CODE

Populated and locked by Montana State Library. Select one of the following: HQ–Headquarters of a Federation or Cooperative. The library or entity that provides the physical space and staff who manage, coordinate, or administer the programs of the federation or cooperative. Note: Agencies that serve other libraries rather than the public should not be reported to FSCS. ME–Member of a Federation or Cooperative. An autonomous library joined by formal or informal agreement(s) with (a) other autonomous libraries in the same state to perform various services cooperatively, such as resource sharing, communications, etc., and (b) libraries that are part of national, multi-state or statewide library federations or cooperatives. (Do not include OCLC.) Do not include multiple outlet administrative entities (e.g., libraries

with branches and that have the word "system" in their legal name) if the entity does not have an agreement with another autonomous library. NO–Not a Member of a Federation or Cooperative. PLS 200

3.2 LEGAL BASIS

Populated and locked by Montana State Library. The legal basis is the type of local government structure within which the entity functions. It reflects the state or local law, which authorizes the library. Select one of the following: CC–City/County. A multi-jurisdictional entity that is operated jointly by a county and a city. CI–Municipal Government (city, town, or village). A municipal government is an organized local government authorized in a state's constitution and statutes and established to provide general government for a specific concentration of population in a defined area. CO–County/Parish. An organized local government authorized in a state's constitution and statutes and established to provide general government. LD–Library District. A library district is a local entity other than a county, municipality, township, or school district that is authorized by state law to establish and operate a public library as defined by FSCS. It has sufficient administrative and fiscal autonomy to qualify as a separate government. Fiscal autonomy requires support from local taxation dedicated to library purposes (e.g., a library tax). MJ–Multi-jurisdictional. An entity operated jointly by two or more units of local government under an intergovernmental agreement which creates a jointly appointed board or similar means of joint governance; to be distinguished from a library which contracts to serve other jurisdictions and from special library districts. Note: Please put city/county combinations under 'CC', rather than under Multi-jurisdictional. NL–Native American Tribal Government. An organized local government authorized and established to provide general government to residents of a Native American reservation. Note: Include native Alaskan villages in this category. NP–Nonprofit Association or Agency. An entity privately controlled but meeting the statutory definition of a public library in a given state; includes association libraries and libraries with 501(c) designation. SD–School District. An organized local entity providing public elementary, secondary, and/or higher education, which under state law, has sufficient administrative and fiscal autonomy to qualify as a separate government. Excludes "dependent public school systems" of county, municipal, township, or state governments. OT–Other. PLS 201

3.3 ADMINISTRATIVE STRUCTURE

Populated and locked by Montana State Library. This code identifies an autonomous library entity (administrative entity) that has its own governance and funding. An administrative entity is the agency that is legally established under local or state law to provide public library service to the population of a local jurisdiction. The administrative entity may have a single outlet, or it may have more than one outlet. Select one of the following: MA–Administrative Entity with Multiple Direct Service Outlets where Administrative Offices are separate. An administrative entity that serves the public directly with two or more service outlets, including some combination of one central library, branch(es), bookmobile(s), and/or books-by mail only. The administrative offices are separate from the direct service outlets and do not provide direct library services. MO–Administrative Entity with Multiple Direct Service Outlets where Administrative Offices are Not Separate. An administrative entity that serves the public directly with two or more service outlets, including some combination of one central library, branch(es), bookmobile(s), and/or books-by mail only. SO–Administrative Entity with a Single Direct Service Outlet. An administrative entity that serves the public directly with one central library, books-by-mail only, or one bookmobile. PLS 202

3.4 FSCS PUBLIC LIBRARY

Populated and locked by Montana State Library. Answer Yes or No to the following question: "Does this public library meet all the criteria of the FSCS public library definition?" A public library is an entity that is established under state enabling laws or regulations to serve a community, district, or region, and that provides at least the following: 1. An organized collection of printed or other library materials, or a combination thereof; 2. Paid staff; 3. An established schedule in which services of the staff are available to the public; 4. The facilities necessary to support such a collection, staff, and schedule; and 5. Is supported in whole or in part with public funds. Note: If the library meets all the requirements of this definition, respond with a Yes. If the library does not meet one or more of the requirements, respond with a No. PLS 203

3.5 GEOGRAPHIC CODE

Populated and locked by Montana State Library. Choose one of the following types of geography (defined by the U.S. Census Bureau) that best describes the legal service area (LSA) for which the public library has been established to offer services and from which (or on behalf of which) the library derives revenue, plus any areas served under contract for which the library is the primary service provider. The Geographic

Code should represent the basis for the Population of Legal Service Area (data element #208), including areas served under contract, and as such should be determined by the state library agency. Each geography type has at least two subtypes: "entirety" and "overlap." If the LSA is not coterminous with one of the geography types, select the "overlap" option for the geography type that most overlaps the LSA. For "County or Equivalent" and "Multi-County" geographies, a third subtype, "remainder excluding AEs of contained geographies," exists specifically for AEs that serve the areas of counties outside of municipalities with separate AEs. PLS 204

Note: For further clarification, see the definition of terms published by the U.S. Census Bureau:

<https://www.census.gov/programssurveys/geography/about/glossary.html>

PL1—Place (e.g., incorporated city or village, census designated), entirety

PL2—Place (e.g., incorporated city or village, census designated), overlap

MPI—Multi-Place, entirety

MP2—Multi-Place, overlap

CD1—Minor Civil Division [MCD] (e.g., town, township), entirety

CD2—Minor Civil Division [MCD] (e.g., town, township), overlap

MD1—Multi-MCD, entirety

MD2—Multi-MCD, overlap

CO1—County or Equivalent, entirety

CO2—County or Equivalent, overlap

CO3—County or Equivalent, remainder excluding AEs of contained geographies

MC1—Multi-County, entirety

MC2—Multi-County, overlap

MC3—Multi-County, remainder excluding AEs of contained geographies

SU1—School District - Unified, entirety

SU2—School District - Unified, overlap

SE1—School District - Elementary, entirety

SE2—School District - Elementary, overlap

SS1—School District - Secondary, entirety

SS2—School District - Secondary, overlap

OTH—Other

3.6 LEGAL SERVICE AREA BOUNDARY CHANGE

Answer yes or no to the following question: "Did the administrative entity's legal service area boundaries change since last year?" Note: Changes are likely to result, for example, when a municipality annexes land, when one municipality in a county becomes either an independent city or its own county necessitating its exclusion from the first county's geography, or when an administrative entity contracts to provide public library service for some additional geographic area other than the geographic area for which it was established (e.g., a municipal library contracts to serve county residents). PLS 205

3.7 NUMBER OF CENTRAL LIBRARIES

Populated and locked by Montana State Library. This is one type of single outlet library (SO) or the library which is the operational center of a multiple-outlet library (MO or MA). Usually, all processing is centralized here, and the principal collections are housed here. Synonymous with main library. PLS 209

3.8 NUMBER OF BRANCH LIBRARIES

Populated and locked by Montana State Library. A branch library is an auxiliary unit of an administrative entity which has at least all the following: 1. separate quarters; 2. an organized collection of library materials; 3. paid staff; and 4. regularly scheduled hours for being open to the public. PLS 210

3.9 NUMBER OF BOOKMOBILES

Populated and locked by Montana State Library. A bookmobile is a traveling branch library. It consists of at least all 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. Note: Count the number of vehicles in use, not the number of stops the vehicle makes. PLS 211

3.10 NUMBER OF DEDICATED VOTED LIBRARY MILLS – CITY

Indicate the number of 'Mills' received during the reporting fiscal year from a city mill levy. Only include mills that are given to the library due to a vote of the population served. Do not report a dollar figure.

3.11 NUMBER OF DEDICATED VOTED LIBRARY MILLS – COUNTY

Indicate the number of 'Mills' received during the reporting fiscal year from a county mill levy. Only include mills that are given to the library due to a vote of the population served. Do not report a dollar figure.

3.12 NUMBER OF DEDICATED VOTED LIBRARY MILLS – LIBRARY DISTRICT

Indicate the number of 'Mills' received during the reporting fiscal year from a district mill levy. Only include mills that are given to the library due to a vote of the population served. Do not report a dollar figure.

3.13 NUMBER OF GENERAL MILLS – CITY

This includes all local government funds designated by the community, district, or region and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, library fines, fees, or grants. Do not include state, federal, and other funds passed through local government for library use. Report these funds with state government revenue or federal government revenue, as appropriate. Note: Significant funding provided by other local government agencies with the authority to levy taxes "on behalf of" the library should be included if the information is available to the reporting agency and if such funds are supported by documentation (such as certified budgets, payroll records, etc.) Do not report a dollar figure.

3.14 NUMBER OF GENERAL MILLS – COUNTY

This includes all local government funds designated by the community, district, or region and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, library fines, fees, or grants. Do not include state, federal, and other funds passed through local government for library use. Report these funds with state government revenue or federal government revenue, as appropriate. Note: Significant funding provided by other local government agencies with the authority to levy taxes "on behalf of" the library should be included if the information is available to the reporting agency and if such funds are supported by documentation (such as certified budgets, payroll records, etc.) Do not report a dollar figure.

3.15 NUMBER OF GENERAL MILLS – SCHOOL DISTRICT

This includes all local government funds designated by the community, district, or region and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, library fines, fees, or grants. Do not include state, federal, and other funds passed through local government for library use. Report these funds with state government revenue or federal government revenue, as appropriate. Note: Significant funding provided by other local government agencies with the authority to levy taxes "on behalf of" the library should be included if the information is available to the reporting agency and if such funds are supported by documentation (such as certified budgets, payroll records, etc.) Do not report a dollar figure.

3.16 DID YOUR LIBRARY HAVE A MILL LEVY ELECTION ON THE BALLOT DURING THIS FISCAL YEAR?

If your library had a mill levy election on the ballot during the reporting fiscal year, please select Yes. Otherwise, please select No.

3.17 WAS THE MILL LEVY ELECTION SUCCESSFUL?

If your library had a mill levy election on the ballot during the reporting fiscal year and it was successful, please select Yes. If your library had a mill levy election on the ballot during the reporting fiscal year and it was not successful, please selection No. If your library did not have a mill levy election on the ballot during the reporting fiscal year, please select Not Applicable.

Section 4 – Staff

Report numbers as of June 30, 2022. Include all positions funded in the library's budget, whether the positions are filled. Full-time equivalent (FTE) is 40 hours per week. For example, 40 hours per week of full-time work by one employee is divided by 40 to equal 1.0 FTE. 20 hours per week of part-time work by one employee is divided by 40 to equal 0.50 FTE. Enter FTE figures, not a headcount.

4.1 LIBRARY DIRECTOR FTE

The chief librarian hired by the board of trustees. This position exists only at main library locations.

4.2 MAIN LIBRARY LIBRARIAN FTE

All staff with the title of librarian who do paid work that typically requires professional training and skill in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. Note: This number also includes the FTE of librarians with ALA-accredited master's degree, reported in 4.3.

Report numbers as of June 30, 2022. Include all positions funded in the library's budget, whether the positions are filled. Full-time equivalent (FTE) is 40 hours per week. For example, 40 hours per week of full-time work by one employee is divided by 40 to equal 1.0 FTE. 20 hours per week of part-time work by one employee is divided by 40 to equal 0.50 FTE. Enter FTE figures, not a headcount.

4.3 MAIN STAFF WITH MLS FTE

Librarians with master's degrees from programs of library and information studies accredited by the American Library Association. Note: Only count staff who both have the degree and have the title of librarian. Include Library Director FTE and Librarian FTE if they have an MLS.

Report numbers as of June 30, 2022. Include all positions funded in the library's budget, whether the positions are filled. Full-time equivalent (FTE) is 40 hours per week. For example, 40 hours per week of full-time work by one employee is divided by 40 to equal 1.0 FTE. 20 hours per week of part-time work by one employee is divided by 40 to equal 0.50 FTE. Enter FTE figures, not a headcount.

4.4 TOTAL MLS FTE – MAIN AND OUTLETS

Automatic calculation: 4.3 + 14.16. PLS 250

4.5 TOTAL LIBRARIANS FTE – MAIN AND OUTLETS

Automatic calculation: 4.1 + 4.2 + 14.14. PLS 251

4.6 MAIN – OTHER FTE

All other employees paid from the library budget, including operations, security, and maintenance staff.

Report numbers as of June 30, 2022. Include all positions funded in the library's budget, whether the positions are filled. Full-time equivalent (FTE) is 40 hours per week. For example, 40 hours per week of full-time work by one employee is divided by 40 to equal 1.0 FTE. 20 hours per week of part-time work by one employee is divided by 40 to equal 0.50 FTE. Enter FTE figures, not a headcount.

4.7 TOTAL – OTHER FTE MAIN AND OUTLETS

Automatic calculation: 4.6 + 14.15. PLS 252

4.8 TOTAL PAID STAFF FTE

Automatic calculation: 4.5 + 4.7. PLS 253

4.9 LIBRARY DIRECTOR HAS MLS

Answer Yes if the library director has a master's degree from a program of library and information studies accredited by the American Library Association.

4.10 HOURS WORKED BY NON-PAID STAFF

This is the number of total hours worked by non-paid staff (volunteers, interns). Round to the nearest whole number.

4.11 DOES YOUR LIBRARY IN ASPEN ([HTTPS://ASPEN.MT.GOV/](https://aspn.mt.gov/)) DISPLAY THE CORRECT INFORMATION FOR STAFF AND TRUSTEES?

Verify that your organization includes an accurate list of staff and trustees in ASPeN <https://aspn.mt.gov> Update ASPeN to reflect any changes and answer Yes to this question. If the information is inaccurate and you cannot update it, enter No.

Section 5 – Income

5.1 LOCAL GOVERNMENT INCOME – LIBRARY DISTRICT

Enter the total income received from the library district fund allocations. Note: Revenue used for operating expenditures should be reported here. If benefits paid by the city/district are included in expenditures, include that revenue here.

5.2 LOCAL GOVERNMENT INCOME – CITY GENERAL FUND

Enter the total income received from the local city general fund allocations. Note: Revenue used for operating expenditures should be reported here. If benefits paid by the city/district are included in expenditures, include that revenue here.

5.3 LOCAL GOVERNMENT – CITY INCOME FROM DEDICATED VOTED LIBRARY MILLS

Enter the total income received from the city that comes from voted library mills. Note: Revenue used for operating expenditures should be reported here. If benefits paid by the city/district are included in expenditures, include that revenue here.

5.4 LOCAL GOVERNMENT INCOME – COUNTY GENERAL FUND

Enter the total income received from the local county general fund allocations. Note: Revenue used for operating expenditures should be reported here. If benefits paid by the city/district are included in expenditures, include that revenue here.

5.5 LOCAL GOVERNMENT – COUNTY INCOME FROM DEDICATED VOTED LIBRARY MILLS

Enter the total income received from the county that comes from voted library mills. Note: Revenue used for operating expenditures should be reported here. If benefits paid by the city/district are included in expenditures, include that revenue here.

5.6 LOCAL GOVERNMENT INCOME – OTHER

Enter the total income received from local government fund allocations not listed in other local government categories. Note: Revenue used for operating expenditures should be reported here. If benefits paid by the city/district are included in expenditures, include that revenue here. E.g., State Entitlement, PILT

5.7 TOTAL LOCAL GOVERNMENT INCOME

Automatic calculation: 5.1 + 5.2 + 5.3 + 5.4 + 5.5 + 5.6. PLS 300

5.8 STATE FEDERATION GRANT

Populated and locked by Montana State Library. Enter the total funds received from the state based on federation and grant programs.

5.9 PER CAPITA/SQUARE MILE STATE AID

Populated and locked by Montana State Library. Enter the total funds received from the state based on per capita and per square mile program requirements.

5.10 TOTAL STATE GOVERNMENT INCOME

Automatic calculation: 5.8 + 5.9. PLS 301

5.11 FEDERAL GOVERNMENT REVENUE

This includes all federal government funds distributed to public libraries for expenditure by the public libraries, including federal money distributed by the state. PLS 302

5.12 OTHER INCOME

This is all operating revenue other than that reported under local, state, and federal or 'Other' categories. Revenue headnote: Report revenue used for operating expenditures as defined below. Include federal, state, local, or other grants. DO NOT include revenue for major capital expenditures, contributions to endowments, revenue passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover). (Funds transferred from one public library to another public library should be reported by only one of the public libraries. The State Data Coordinator shall determine which library will report these funds.) PLS 303

5.13 TOTAL INCOME

Automatic calculation: 5.7 + 5.10 + 5.11 + 5.12. PLS 304

5.14 LOCAL GOVERNMENT CAPITAL INCOME

Report all governmental funds designated by the community, district, or region and available to the public library for the purpose of major capital expenditures, except for state and/or federal money distributed by the local government. PLS 400

5.15 STATE GOVERNMENT CAPITAL INCOME

Report all funds distributed to public libraries by state government for expenditure by the public libraries for the purpose of major capital expenditures, except for federal money distributed by the state. PLS 401

5.16 FEDERAL GOVERNMENT CAPITAL INCOME

Report federal governmental funds, including federal funds distributed by the state or locality, and grants and aid received by the library for the purpose of major capital expenditures. PLS 402

5.17 OTHER GOVERNMENT CAPITAL INCOME

Report private (nongovernmental funds), including grants received by the library for the purpose of major capital expenditures. PLS 403

Section 6 – Expenditures

6.1 EMPLOYEE SALARIES AND WAGES

This includes salaries and wages for all library staff (including plant operations, security, and maintenance staff) for the fiscal year. Include salaries and wages before tax deductions but exclude employee benefits. PLS 350

6.2 EMPLOYEE BENEFITS

These are the benefits outside of salaries and wages paid and accruing to employees (including 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, workmen's compensation, tuition, and housing benefits. PLS 351

6.3 TOTAL STAFF EXPENSES

Automatic calculation: 6.1 + 6.2. PLS 352

6.4 PRINT MATERIALS

Report all operating expenditures for the following print materials: books, current serial subscriptions, government documents, and any other print acquisitions. Exclude charges or fees for interlibrary loans and expenditures for document delivery. PLS 353

6.5 ELECTRONIC MATERIALS

Report all operating expenditures for electronic (digital) materials. Types of electronic materials include e-books, audio and video downloadables, 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 materials for which permanent or temporary access rights have been acquired. Include expenditures for database licenses. Note: Expenditures for computer software used to support library operations or to link to external networks, including the Internet, are reported under Other Operating Expenditures. PLS 354

6.6 OTHER MATERIALS

Report all operating expenditures for other materials, such as microform, audio and video physical units, DVD, and materials in new formats. PLS 355

6.7 TOTAL COLLECTION EXPENDITURES

Automatic calculation: 6.4 + 6.5 + 6.6. PLS 356

6.8 CONTINUING EDUCATION

This includes travel, registration, and membership costs for any continuing education earned by any of your library employees.

6.9 OTHER OPERATING EXPENSES

This includes all expenditures other than those for staff (6.3) and collection (6.7).

Note: 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 of operating and maintaining physical facilities, and fees paid to a consultant, auditor, architect, attorney, etc.

6.10 TOTAL OTHER OPERATING EXPENDITURES

Automatic calculation: 6.8 + 6.9. PLS 357

6.11 TOTAL OPERATING EXPENDITURES

Automatic calculation: 6.3 + 6.7 + 6.10. PLS 358

6.12 CAPITAL COLLECTION EXPENDITURES

All capital expenditures for initial collections for new buildings, additions to buildings, or renovation of buildings.

6.13 CAPITAL FURNISHING AND EQUIPMENT EXPENDITURES

All capital expenditures for furnishings or equipment for new buildings.

6.14 CAPITAL BUILDING EXPENDITURES

All capital expenditures for site acquisition, new buildings, additions to buildings, or renovation of buildings.

6.15 OTHER CAPITAL EXPENDITURES

All other capital expenditures other than those reported in the above categories.

Include library automation systems, new vehicles, and other one-time major projects.

6.16 TOTAL CAPITAL EXPENDITURES

Automatic calculation: 6.12 + 6.13 + 6.14 + 6.15. PLS 405

Section 7 – Collection

7.1 PRINT MATERIALS

Populated by Montana State Library for members of the Montana Shared Catalog. Report a single figure that includes the following: Books in print. Books are non-serial printed publications (including music scores or other bound forms of printed music, and maps) that are bound in hard or soft covers, or in loose-leaf format. Do not include unbound sheet music.

Include non-serial government documents. Report the number of physical units, including duplicates. For smaller libraries, if volume data are not available, count the number of titles. Books packaged together as a unit (e.g., a 2-volume set) and checked out as a unit are counted as one physical unit. PLS 450

7.2 ELECTRONIC BOOK – EBOOKS PROVIDED BY THE STATE LIBRARY (MTLIB2GO)

Populated and locked by Montana State Library. 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. 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 device 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. 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. Report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use.

NOTE: For purposes of this survey, units are defined as "units of acquisition or purchase". The "unit" is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users. Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 "unit"; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 "units". Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 "units".

7.3 OTHER ELECTRONIC BOOK (E-BOOKS)

Include all other e-books not counted in 7.2.

7.4 TOTAL ELECTRONIC BOOK (E-BOOKS)

Automatic calculation: 7.2 + 7.3. PLS 451

7.5 AUDIO - PHYSICAL UNITS

Populated by Montana State Library for members of the Montana Shared Catalog. These are materials circulated in a fixed, physical format on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically, electronically, or both. Include records, audiocassettes, audio cartridges, audio discs (including audio-CD-ROMs), audio-reels, talking books, and other sound recordings stored in a fixed, physical format. Do not include downloadable electronic audio files. Report the number of units, including duplicates. Items packaged together as a unit (e.g., two audiocassettes for one recorded book) and checked out as a unit are counted as one physical unit. PLS 452

7.6 AUDIOS - DOWNLOADABLE UNITS PROVIDED BY THE STATE LIBRARY (MTLIB2GO)

Populated and locked by Montana State Library. These are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced (played back) electronically. Audio - Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user's personal computer or

personal device for a limited time. Include Audio – Downloadable Units held locally and remote Audio – Downloadable Units for which permanent or temporary access rights have been acquired. Report the number of units.

Report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; Do not duplicate numbers at each branch. NOTE: For purposes of this survey, units are defined as "units of acquisition or purchase". The "unit" is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users. Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 "unit"; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 "units". For smaller libraries, if volume data are not available, the number of titles may be counted. Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 "units".

7.7 OTHER AUDIO – DOWNLOADABLE UNITS

Include all other downloadable audio units not included in 7.5.

7.8 TOTAL AUDIO – DOWNLOADABLE UNITS

Automatic calculation: 7.6 + 7.7. PLS 453

7.9 VIDEO – PHYSICAL UNITS

Populated by Montana State Library for members of the Montana Shared Catalog. These are materials circulated in a fixed, physical format on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver or computer monitor. Video formats may

include tape, DVD and CD-ROM. Do not include downloadable electronic video files. Report the number of units, including duplicates. Items packaged together as a unit (e.g., two DVDs for one movie) and checked out as a unit are counted as one physical unit. PLS 454

7.10 VIDEO DOWNLOADABLE UNITS

These are downloadable electronic files on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver, computer monitor or video-enabled mobile device. Video Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user's personal computer or personal device for a limited time. Include Video Downloadable Units held locally and remote Video Downloadable Units for which permanent or temporary access rights have been acquired. Report the number of units. Report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity.

Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; Do not duplicate numbers at each branch. NOTE: For purposes of this survey, units are defined as "units of acquisition or purchase." The "unit" is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users. Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 "unit"; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 "units". For smaller libraries, if volume data are not available, the number of titles may be counted. Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 "units." PLS 455

7.11 LICENSED DATABASES – STATE

Populated and locked by Montana State Library. This number will be reported by the State Library. Report the number of 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. PLS 457

7.12 LICENSED DATABASES - LOCAL/OTHER COOPERATIVE AGREEMENTS

An electronic collection is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts, photographs, music, video, etc.) with a common user interface and software for the retrieval and use of the data. An electronic collection may be organized, curated, and electronically shared by the library, or rights may be provided by a third-party vendor. An electronic collection may be funded by the library, or provided through cooperative agreement with other libraries, or through the State Library. Do not include electronic collections that are provided by third parties and freely linked to on the Web. Electronic Collections do not have a circulation period and may be retained by the patron. Remote access to the collection may or may not require authentication. Unit records may or may not be included in the library's catalog; the library may or may not select individual titles. Include electronic collections that are available online or are locally hosted in the library. PLS 456

7.13 TOTAL LICENSED DATABASES

Automatic calculation: 7.11 + 7.12. PLS 458

7.14 CURRENT PRINT SERIAL SUBSCRIPTIONS

Report the number of current print serial subscriptions, including duplicates, for all outlets. Examples of serials are periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series.

7.15 OTHER CIRCULATING PHYSICAL ITEMS

Populated by Montana State Library for members of the Montana Shared Catalog. Report any items, which can be checked out to an individual, not previously

otherwise reported. Recording and paperback exchanges should not be included unless they are cataloged into the library's collection. Ex: tools, fishing rods, cake pans. PLS 462

7.16 TOTAL PHYSICAL COLLECTION

Automatic calculation: 7.1 + 7.5 + 7.9 + 7.15. PLS 461

Section 8 – Service Hours and Square Footage

8.1 TOTAL NUMBER OF HOURS OPEN ANNUALLY – MAIN

This is the number of annual public service hours for the main library. Include the actual hours open for public service. Minor variations in public service hours need not be included. Extensive hours closed to the public due to natural disasters or other events should be subtracted from the total number of hours open. DO NOT count branches or bookmobiles for this count. PLS 713

8.2 TOTAL NUMBER OF WEEKS OPEN ANNUALLY – MAIN

This is the number of weeks during the year that the main library was open. The count should be based on the number of weeks that the main library was open for half or more of its scheduled service hours. Weeks closed to the public due to natural disasters or other events should be subtracted from the total number of weeks open. For example, if a library is normally open 52 weeks a year but is closed for 4 weeks due to natural disaster, renovations, etc., report this as 48 weeks for the fiscal year of the event. DO NOT count branches or bookmobiles in this count. Round fractions to the nearest whole number of weeks. If the library was open at least half of its scheduled hours in a given week, round up to the next week. If the library was open less than half of its scheduled hours, round down. PLS 714

8.3 SQUARE FOOTAGE – MAIN

Populated and locked by Montana State 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 'main' 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 'main' library has usage of that area. PLS 711

8.4 OUTLET TYPE

Populated and locked by Montana State Library. An outlet is a unit of an administrative entity that provides direct public library service. Select one of the following: BR–Branch Library BS–Bookmobile(s) CE–Central Library.

BR–Branch Library: A branch library is an auxiliary unit of an administrative entity which has at least all the following: 1. separate quarters; 2. an organized collection of library materials; 3. paid staff; and 4. regularly scheduled hours for being open to the public.

BS–Bookmobile(s). A bookmobile is a traveling branch library. It consists of at least all the following: 1. a truck or van that carries an organized collection of library materials; 2. a paid staff; and 3. regularly scheduled hours (bookmobile stops) for being open to the public. Note: A separate outlet record may be created for each bookmobile. You may wish to create separate outlet records for individual bookmobiles if (1) they have different addresses and/or (2) they have different Metropolitan Status Codes. Alternatively, a bookmobile outlet record may include more than one bookmobile.

CE–Central Library. This is one type of single outlet library (SO) or the library which is the operational center of a multiple–outlet library (MO or MA). Usually, all processing is centralized here, and the principal collections are housed here. Synonymous with main library. Note: Each administrative entity may report either no central library or one central library. No administrative entity may report more than one central library. If you wish to identify a central library in the outlet file, identify the library with the largest collection as the central library for FSCS purposes, and report all others as branches. Where there are several co–equal outlets and no principal collection, report all such outlets as branches, not central libraries. PLS 709
Branches and Bookmobiles

8.5 BRANCH OR BOOKMOBILE NAME

Populated and locked by Montana State Library. The full legal name of each branch library or bookmobile. Do not use acronyms. PLS 702

8.6 TOTAL NUMBER OF HOURS OPEN ANNUALLY – OUTLET

This is the number of annual public service hours for the branch or bookmobile. Include the actual hours open for public service. Minor variations in public service hours need not be included. Extensive hours closed to the public due to natural disasters or other events should be excluded from the count. PLS 713

8.7 TOTAL NUMBER OF WEEKS OPEN ANNUALLY - OUTLET

This is the number of weeks during the year that the branch or bookmobile was open. The count should be based on the number of weeks that branch or bookmobile was open for half or more of its scheduled service hours. Weeks closed to the public due to natural disasters or other events should be subtracted from the total number of weeks open. For example, if a library is normally open 52 weeks a year but is closed for 4 weeks due to natural disaster, renovations, etc., report this as 48 weeks for the fiscal year of the event.

Round fractions to the nearest whole number of weeks. If the branch or bookmobile were open at least half of its scheduled hours in a given week, round up to the next week. If the branch or bookmobile were open less than half of its scheduled hours, round down. PLS 714

8.8 TOTAL NUMBER OF HOURS OPEN ANNUALLY - MAIN AND ALL BRANCHES

Automatic calculation: 8.1 + 8.6.

8.9 TOTAL NUMBER OF WEEKS OPEN ANNUALLY - MAIN AND ALL BRANCHES

Automatic calculation: 8.2 + 8.7.

8.10 TOTAL SQUARE FOOTAGE OF MAIN AND ALL BRANCH LIBRARIES

Automatic calculation: 8.3 + 14.13. PLS 711

Section 9 – Transactions

9.1 LIBRARY USERS

This is the total number of persons entering the library and branches for whatever purpose during the year. Note: If an actual count of visits is unavailable, determine an

annual estimate by counting visits during a typical week in October and multiplying the count by 52. A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or the library. Choose a week in which the library is open its regular hours. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open). PLS 501

9.2 LIBRARY USERS REPORTING METHOD

Regarding the number of Library Visits (data element #501) entered, is this an annual count or an annual estimate based on a typical week or weeks? Select one of the following: CT - Annual Count ES - Annual Estimate Based on Typical Week(s). PLS 501a

9.3 REFERENCE TRANSACTIONS

Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet information needs. A reference transaction includes information and referral service as well as unscheduled individual instruction and assistance in using information sources (including web sites and computer-assisted instruction). Count Readers Advisory questions as reference transactions.

Information sources include:

- printed and non-printed material
- machine-readable databases (including computer-assisted instruction)
- the library's own catalogs and other holdings records
- other libraries and institutions through communication or referral
- persons both inside and outside the library

When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again. If a contact includes both reference and directional services, it should be reported as one reference transaction. Duration should not be an element in determining whether a transaction is a reference transaction.

NOTE: It is essential that libraries do not include directional transactions in the report of reference transactions. Directional transactions include giving instruction for locating staff, library users, or physical features within the library. Examples of

directional transactions include, "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?"

If an annual count of reference transactions is unavailable, count reference transactions during a typical week or weeks, and multiply the count to represent an annual estimate. [If the sample is done four times a year, multiply totals by 13, if done twice a year multiply by 26, if done only annually, multiply by 52.] A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times; vacation periods for key staff, or days when unusual events are taking place in the community or in the library. Choose a week in which the library is open its regular hours. PLS 502

9.4 REFERENCE TRANSACTION REPORTING METHOD

Regarding the number of Reference Transactions (data element #502) entered, is this an annual count or an annual estimate based on a typical week or weeks? Select one of the following: CT - Annual Count ES - Annual Estimate Based on Typical Week(s). PLS 502a

9.5 ATTENDEES IN TECHNOLOGY CLASSES

Report the total number of patrons receiving technology instruction in a class.

9.6 ATTENDEES IN ONE-ON-ONE TECHNOLOGY ASSISTANCE

Report the total number of patrons receiving technology instruction in a one-on-one session.

Section 10 – Circulation

10.1 REGISTERED USERS

Populated by Montana State Library for members of the Montana Shared Catalog. A registered user 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 or gain access to other library resources. Note: Files should have been purged within the past three (3) years. PLS 503

10.2 PHYSICAL ITEM CIRCULATION

Populated by Montana State Library for members of the Montana Shared Catalog. The total annual circulation of all physical library materials of all types, including renewals. Note: Count all physical materials in all formats that are charged out for use outside the library. Interlibrary loan transactions included are only items borrowed for users. Do not include items checked out to another library. PLS 553

10.3 CIRCULATION OF CHILDREN'S MATERIALS – PHYSICAL

Populated by Montana State Library for members of the Montana Shared Catalog. The total annual circulation of all physical children's library materials of all types, including renewals.

10.4 CIRCULATION OF CHILDREN'S ELECTRONIC MATERIALS – STATE (MTLIB2GO)

Populated and locked by Montana State Library. Electronic Materials are materials that are distributed digitally online and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Types of electronic materials include e-books and downloadable electronic video and audio files. Electronic materials packaged together as a unit and checked out as a unit are counted as one use. Include circulation only for items that require a user authentication and have a limited period of use.

10.5 CIRCULATION OF CHILDREN'S MATERIALS – TOTAL

Automatic calculation: 10.3 + 10.4. PLS 551

10.6 CIRCULATION OF E-MATERIALS PROVIDED BY THE STATE LIBRARY (MTLIB2GO)

Populated and locked by Montana State Library. Electronic Materials are materials that are distributed digitally online and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Types of electronic materials include e-books and downloadable electronic video and audio files. Electronic materials packaged together as a unit and checked out as a unit are counted as one use. Include circulation only for items that require a user authentication and have a limited period of use.

10.7 CIRCULATION OF E-MATERIALS – OTHER

Electronic Materials are materials that are distributed digitally online and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Types of electronic materials include e-books and downloadable electronic video and audio files. Electronic materials packaged together as a unit and checked out as a unit are counted as one use. Include circulation only for items that require a user authentication and have a limited period of use.

10.8 TOTAL E-MATERIALS CIRCULATION

Automatic calculation: 10.6 + 10.7. PLS 552

10.9 CIRCULATION OF OTHER PHYSICAL ITEMS

Populated by Montana State Library for members of the Montana Shared Catalog. Circulation of all physical items other than print books, physical audio units, physical video units, and serials, including renewals. These are materials in a fixed, physical format available for use outside the library. These can include a variety of item types, such as wi-fi hotspots, sewing machines, cake pans, tools, telescopes, board games, video games, etc. PLS 561

10.10 TOTAL NUMBER OF DATABASE RETRIEVALS

The number of full-content units or descriptive records examined, downloaded, or otherwise supplied to user, from online library resources that require user authentication but do not have a circulation period. Examining documents is defined as having the full text of a digital document or electronic resource downloaded or fully displayed. Some electronic services Do not require downloading as simply viewing documents is normally sufficient for user needs. Include use both inside and outside the library. Do not include use of the OPAC or website. This used to be called licensed database use. NOTE: enter the total from all subscribed databases. PLS 554

10.11 TOTAL ELECTRONIC CONTENT USE

Automatic calculation: 10.8 + 10.10. PLS 555

10.12 TOTAL COLLECTION USE

Automatic calculation: 10.2 + 10.8 + 10.10. PLS 556

10.13 TOTAL CIRCULATION (10.2 + 10.8)

Automatic calculation: 10.2 + 10.8. PLS 550

10.14 NUMBER OF ELECTRONIC CARDS ISSUED

Populated by Montana State Library for members of the Montana Shared Catalog and MontanaLibrary2Go. The total count of electronic content access cards issued when users were unable to access the physical library. This may include platforms such as OverDrive, an online public access catalog, or e-mail.

10.15 CURRENT OVERDUE FINE POLICY

Answer Yes or No to the following question: As of the end of the reporting period, does the library charge overdue fines to any users when they fail to return physical print materials by the date due? NOTE: Overdue fines are monetary penalties that typically increase according to the number of days the materials are overdue. Overdue fines are not replacement costs for lost or damaged materials. PLS 504

Section 11 – Programs

11.1 NUMBER OF CHILDREN'S PROGRAMS

Automatic calculation: 11.2 + 11.3.

11.2 NUMBER OF SYNCHRONOUS PROGRAM SESSIONS TARGETED AT CHILDREN AGES 0-5

A program session targeted at children ages 0-5 is any planned event for which the primary audience is infants, toddlers, or preschool-age children. Examples of these types of program sessions include, but are not limited to, story hours, every child ready to read programs, musical or sing-along events, and puppet shows. Include program sessions aimed at children ages 0-5 even if adult caregivers also attend. Each program session should only be counted in one age category based on its primary target audience. PLS 601

11.3 NUMBER OF SYNCHRONOUS PROGRAM SESSIONS TARGETED AT CHILDREN AGES 6-11

A program session targeted at children ages 6-11 is any planned event for which the primary audience is elementary-school-age children. Examples of these types of program sessions include, but are not limited to, story hours, science events, crafting classes, and summer reading events. Include program sessions aimed at children ages 6-11 even if adult caregivers also attend with the children. Each program session should only be counted in one age category based on its primary target audience. PLS 602

11.4 NUMBER OF SYNCHRONOUS PROGRAM SESSIONS TARGETED AT YOUNG ADULTS AGES 12-18

A young adult program is any planned event for which the primary audience is young adults ages 12 to 18 and which introduces the group of young adults attending to any of the broad range of library services or activities for young adults or which directly provides information to participants. Each program session should only be counted in one age category based on its primary target audience. PLS 603

11.5 NUMBER OF SYNCHRONOUS PROGRAM SESSIONS TARGETED AT ADULTS AGE 19 OR OLDER

An adult program session is any planned event for which the primary audience is adults age 19 or older. Examples of these types of program sessions include, but are not limited to, book discussions, citizenship classes, and lectures. Each program session should only be counted in one age category based on its primary target audience. PLS 604

11.6 NUMBER OF SYNCHRONOUS GENERAL INTEREST PROGRAM SESSIONS

A general interest program session is any planned event that is appropriate for any age group or multiple age groups. Include all-age, all-library, family, and intergenerational program sessions. Examples of these types of program sessions include, but are not limited to, family game nights, holiday events, storytelling programs, or chess clubs. Include all programs here that do not fit into the other age category elements. Each program session should only be counted in one age category based on its primary target audience; do not include program sessions here that have already been counted in earlier age category elements. Avoid including program sessions that are targeted at more than one non-adult age category (and are not targeted at adults); these should be counted in the child or young adult age category that best represents the target audience. PLS 605

11.7 NUMBER OF SYNCHRONOUS IN-PERSON ONSITE PROGRAM SESSIONS

An in-person onsite program session is any planned event that includes an in-person attendance option and takes place at library facilities. Examples include, but are not limited to, a job skills class in the library or a nature program on the library grounds. Regardless of the number of formats in which a program session is offered, each program session should only be counted once and in one format category. Include in-person program sessions that also have a virtual attendance option and count them as a single program session. PLS 606

11.8 NUMBER OF SYNCHRONOUS IN-PERSON OFFSITE PROGRAM SESSIONS

An in-person offsite program session is any planned event that includes an in-person attendance option and takes place somewhere other than the library or the library grounds. Examples include, but are not limited to, facilitating a book club at a local nursing home, hosting a story-time at a local farmer's market, or visiting a school to present about library services. Regardless of the number of formats in which a program session is offered, each program session should only be counted once and in one format category. Include in-person program sessions that also have a virtual attendance option and count them as a single program session. PLS 607

11.9 NUMBER OF SYNCHRONOUS VIRTUAL PROGRAM SESSIONS

A synchronous (live) virtual program session is any planned event that is streamed virtually and can be viewed live as it progresses (i.e., live streaming). Regardless of the number of formats in which a program session is offered, each program session should only be counted once and in one format category. Include virtual program sessions that are also recorded. Include program sessions hosted on Facebook Premiere that are facilitated by a staff member. Count virtual program sessions at the administrative entity level; do not duplicate numbers at each branch. Exclude program sessions that also have an in-person component; these should be counted under Number Synchronous In-Person Onsite Program Sessions or Number of Synchronous In-Person Offsite Program Sessions (data elements 606 or 607). PLS 608

11.10a TOTAL NUMBER OF SYNCHRONOUS PROGRAM SESSIONS BY AUDIENCE

Automatic calculation: 11.2 + 11.3 + 11.4 + 11.5 + 11.6. PLS 600

11.10b TOTAL NUMBER OF SYNCHRONOUS PROGRAM SESSIONS BY FORMAT

Automatic calculation: 11.7 + 11.8 + 11.9. The total must match the value from 11.10a.

11.11 CHILDREN'S PROGRAM ATTENDANCE

Automatic calculation: 11.12 + 11.13 + 11.14 + 11.15 + 11.16.

11.12 ATTENDANCE AT SYNCHRONOUS PROGRAMS TARGETED AT CHILDREN AGES 0-5

The count of the audience at all program sessions for which the primary audience is children ages 0 to 5 years. Please count all attendees of these program sessions regardless of age. PLS 611

11.13 ATTENDANCE AT SYNCHRONOUS PROGRAMS TARGETED AT CHILDREN AGES 6-11

The count of the audience at all program sessions for which the primary audience is children 6 to 11 years. Please count all attendees of these program sessions regardless of age. PLS 612

11.14 ATTENDANCE AT SYNCHRONOUS PROGRAMS TARGETED AT YOUNG ADULTS AGES 12-18

The count of the audience at all program sessions for which the primary audience is young adults 12 to 18 years and includes 18-year-olds. Please count all attendees of these program sessions regardless of age. PLS 613

11.15 ATTENDANCE AT SYNCHRONOUS PROGRAMS TARGETED AT ADULTS AGE 19 OR OLDER

The count of the audience at all program sessions for which the primary audience is adults age 19 or older. Please count all attendees of these program sessions regardless of age. PLS 614

11.16 ATTENDANCE AT SYNCHRONOUS GENERAL INTEREST PROGRAM SESSIONS

The count of the audience at program sessions that are appropriate for any age group or multiple age groups. Please count all attendees of these program sessions regardless of age. PLS 615

11.17 SYNCHRONOUS IN-PERSON ONSITE PROGRAM ATTENDANCE

The count of in-person attendance at program sessions that take place at library facilities. Regardless of the number of formats in which a program session is offered, each attendee should only be counted once. Each attendee should be counted in the format category in which they attended the program session. For in-person onsite programs that also have a virtual component, exclude virtual attendance; this should be counted under Synchronous Virtual Program Attendance (data element 618). PLS 616

11.18 SYNCHRONOUS IN-PERSON OFFSITE PROGRAM ATTENDANCE

The count of in-person attendance at program sessions that take place somewhere other than the library. Regardless of the number of formats in which a program session is offered, each attendee should only be counted once. Each attendee should be counted in the format category in which they attended the program session. For in-person offsite programs that also have a virtual component, exclude virtual attendance; this should be counted under Synchronous Virtual Program Attendance (data element 618). PLS 617

11.19 SYNCHRONOUS VIRTUAL PROGRAM ATTENDANCE

The count of live attendance at virtual program sessions. Regardless of the number of formats in which a program session is offered, each attendee or view should only be counted once. Each attendee should be counted in the format category in which they attended or viewed the program session. Count each participant device connected to a virtual program as a single attendee. For program sessions hosted on Facebook Live, YouTube Live, or similar platforms, count peak concurrent viewers. For those hosted on videoconferencing platforms, count the maximum number of non-staff participants during the session. For virtual program sessions that are also recorded for later, on-demand, asynchronous viewing, exclude views that occur after the session has ended; these should be counted under Total Views of Asynchronous Program Presentations (data element 630). For program sessions that also have an in-person component, exclude in-person attendance; this should be counted under Synchronous In-Person Onsite Program Attendance or Synchronous In-Person Offsite Program Attendance (data elements 616 or 617). PLS 618

11.20a TOTAL ATTENDANCE AT SYNCHRONOUS PROGRAMS BY AUDIENCE

Automatic calculation: 11.12 + 11.13 + 11.14 + 11.15 + 11.16. PLS 610

11.20b TOTAL ATTENDANCE AT SYNCHRONOUS PROGRAMS BY FORMAT

Automatic calculation: 11.17 + 11.18 + 11.19. The total must match the value from 11.20a.

11.21 TOTAL NUMBER OF ASYNCHRONOUS PROGRAM PRESENTATIONS

An asynchronous program presentation is any recording of program content that cannot be viewed live as it unfolds (i.e., on demand streaming). Only include program presentations posted during the reporting period. Regardless of the number of platforms on which a presentation is posted, count each unique presentation only once. Include program sessions hosted on Facebook Premiere that are not facilitated by a staff member. Count asynchronous program presentations at the administrative entity level; do not duplicate numbers at each branch. Include recordings of synchronous program sessions that were available for asynchronous viewing after the session ended. PLS 620

11.22 TOTAL VIEWS OF ASYNCHRONOUS PROGRAM PRESENTATIONS WITHIN 30 DAYS

The count of views of asynchronous program presentations for a period of thirty (30) days after the presentation was posted, even if that period extends beyond the survey reporting period (or fiscal year). For program presentations made available via Facebook, count unique 1-minute views of each video. For those made available via other platforms, count unique views of each video. For program presentations that are recordings of synchronous virtual program sessions, exclude synchronous attendance; these should be counted under Synchronous In-Person Onsite Program Attendance, Synchronous In-Person Offsite Program Attendance, or Synchronous Virtual Program Attendance (data elements 616, 617, or 618). PLS 630

Section 12 – Interlibrary Loans

12.1 LOANS – IN STATE

Populated by Montana State Library for members of the Montana Shared Catalog and OCLC Group Services. Library materials, or copies of the materials, provided to

another Montana library on request. Do not include items loaned between outlets with the same library administrative entity. Montana Shared Catalog Sharing Group activity counts as In-State Loans.

12.2 LOANS - OUT OF STATE

Populated by Montana State Library for members of the Montana Shared Catalog and OCLC Group Services. Library materials, or copies of the materials, provided to another non-Montana library on request.

12.3 TOTAL LOANS

Automatic calculation: 12.1 + 12.2. PLS 575

12.4 BORROWS - IN STATE

Populated by Montana State Library for members of the Montana Shared Catalog and OCLC Group Services. Library materials, or copies of the materials, provided to another non-Montana library on request. Montana Shared Catalog Sharing Group activity counts as In-State Borrows.

12.5 BORROWS - OUT OF STATE

Populated by Montana State Library for members of the Montana Shared Catalog and OCLC Group Services. Library materials, or copies of the materials, received from another non-Montana library on request.

12.6 TOTAL BORROWS

Automatic calculation: 12.4 + 12.5. PLS 576

Section 13 – Internet Access

13.1 LIBRARY HAS INTERNET ACCESS

Does your library have access to the Internet?

13.2 LIBRARY PROVIDES WIRELESS ACCESS

Does the library provide patrons with Wireless Public Internet Access?

13.3 DOES THE LIBRARY HAVE DIFFERENT BANDWIDTH FOR STAFF AND PUBLIC?

Is bandwidth different for Staff and Public? (e.g., separate LANs or devices/software may make available bandwidth different for Staff and Public)

13.4 TYPE OF INTERNET CONNECTION

What kind of access does your library have to the Internet? Choose from the drop-down menu the type of technology used to access the Internet by your library. If you are not sure, please contact your Internet Service Provider (ISP).

13.5 LAPTOP AND/OR DEVICE CHECKOUT

The number of laptops and/or Devices checked out at the library. Circulation reports or checkout logs may be a reference for this information. Note: If an annual count of laptop and/or device checkout is unavailable, determine an annual estimate by counting transactions during a typical week and multiply the count by 52. A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or in the library.

13.6 INTERNET ACCESSIBLE COMPUTERS – USED BY PUBLIC

The number of the library's Internet computers [personal computers (PCs) and laptops, whether purchased, leased, or donated, used by the public in the library. PLS 650

13.7 INTERNET ACCESSIBLE COMPUTERS – USED BY STAFF

The number of Internet connected computers (devices) in total, used by staff only.

13.8 PUBLIC INTERNET COMPUTERS USES

The number of uses (sessions) of the library's Internet computers in the library. If the computer is used for multiple purposes (Internet access, word- processing, OPAC, etc.) and Internet uses (sessions) 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 uses (sessions). Note: This count includes only the library's Internet computers. Do not include Wi-Fi access using nonlibrary computers. The number of uses (sessions) may be counted manually, using registration logs. Count each use (session) for public internet computers, regardless of the amount of time spent on the computer. A use (session) on the library's public internet computer(s) three times a year would count as three uses (sessions). If the data element is collected as a weekly figure, multiply that figure by 52 to annualize it. PLS 651

13.9 PUBLIC INTERNET COMPUTERS USES REPORTING METHOD

Regarding the number of Public Internet Computer Uses (data element #651) entered, is this an annual count or an annual estimate based on a typical week or weeks? Select one of the following: CT - Annual Count ES - Annual Estimate Based on Typical Week(s). PLS 651a

13.10 WIRELESS SESSIONS

The number of wireless sessions provided by the library wireless service. PLS 652

13.11 WIRELESS SESSIONS REPORTING METHOD

Regarding the number of Wireless Sessions (data element #652) entered, is this an annual count or an annual estimate based on a typical week or weeks? Select one of the following: CT - Annual Count ES - Annual Estimate Based on Typical Week(s). PLS 652a

13.12 LIBRARY WEBSITE VISITS – ANNUALLY

Visits represent the annual number of sessions initiated by all users from inside or outside the library to the library website. The library website consists of all webpages under the library's domain. A website "visit" or "session" occurs when a user connects to the library's website for any length of time or purpose, regardless of the number of pages or elements viewed. Usage of library social media accounts (e.g., Facebook, Twitter, etc.) should not be reported here. Libraries unable to collect a count of their website visits should report "N/A" (missing). Libraries without websites should report "N/A" (not applicable). PLS 653

Section 14 – Outlets

14.1 FSCS ID & EXTENSION

Populated and locked by Montana State Library. This is the identification code assigned by PLS Web Portal. Outlets are assigned the same FSCS ID as the administrative entity to which they belong, with a unique three-digit suffix added to distinguish each outlet. PLS 700

14.2 LIBRARY NAME

Populated and locked by Montana State Library. This is the legal name of the outlet. Note: Provide the legal name of the outlet. Do not use acronyms. Do not abbreviate the name unless it exceeds the PLS Web Portal field length of 60 characters. Avoid abbreviations at the beginning of the name and do not punctuate abbreviations. PLS 702

14.3 CONTACT NAME AND POSITION

The name and position of the staff member at the branch to contact with questions about the PLS. This can also be the central library director.

14.4 CONTACT'S EMAIL ADDRESS

The email address of the staff member at the branch to contact with questions about the PLS. This can also be the central library director's email address. Be sure it is formatted: person@library.xyz.

14.5 STREET ADDRESS

This is the complete street address of the outlet. Note: Do not report a post office box or general delivery. For a bookmobile that operates from an administrative entity, branch, or central library, report the address of the administrative entity, branch, or central library from which it operates. For a bookmobile that is itself the administrative entity, report the address where the bookmobile is parked at night. PLS 703

14.6 MAILING ADDRESS

Populated and locked by Montana State Library. The mailing address of the library outlet. Note: This can be a post office box or general delivery address.

14.7 CITY

Populated and locked by Montana State Library. This is the city or town in which the outlet is located. PLS 704

14.8 ZIP CODE

Populated and locked by Montana State Library. This is the standard five-digit postal ZIP code for the street address of the outlet. PLS 705

14.9 COUNTY

Populated and locked by Montana State Library. This is the county in which the outlet is physically located. PLS 707

14.10 PHONE NUMBER

Populated and locked by Montana State Library. This is the telephone number of the outlet, including area code. PLS 708

14.11 FAX NUMBER

If the outlet has a fax machine, enter the fax number even if it is the same as the outlet's main phone number.

14.12 OUTLET TYPE

Populated and locked by Montana State Library. An outlet is a unit of an administrative entity that provides direct public library service. PLS 709
Select one of the following:

BM—Books-by-Mail Only. A direct mail order service which provides books and other library materials. Books by-mail typically serves rural residents, the disabled, the homebound, and others without access to another type of public library outlet. Requests for materials are usually received by mail and by telephone only. Only

books-by mail services that are housed separately from any other type of direct public service outlet (that is, central library, branches, or bookmobiles) should be coded here.

BR—Branch Library. A branch library is an auxiliary unit of an administrative entity which has at least all the following: Separate quarters; An organized collection of library materials; Paid staff; and regularly scheduled hours for being open to the public.

BS—Bookmobile(s). A bookmobile is a traveling branch library. It consists of at least all the following: A truck or van that carries an organized collection of library materials; A paid staff; and regularly scheduled hours (bookmobile stops) for being open to the public. Note: A separate outlet record may be created for each bookmobile. You may wish to create separate outlet records for individual bookmobiles if they have different addresses. Alternatively, a bookmobile outlet record may include more than one bookmobile.

CE—Central Library. This is one type of single outlet library (SO) or the library which is the operational center of a multiple outlet library (MO or MA). Usually, all processing is centralized here, and the principal collections are housed here. Synonymous with main library. Note: Each administrative entity may report either no central library or one central library. No administrative entity may report more than one central library. If you wish to identify a central library in the outlet file, identify the library with the largest collection as the central library for FSCS purposes, and report all others as branches. Where there are several coequal outlets and no principal collection, report all such outlets as branches, not central libraries.

14.13 SQUARE FOOTAGE OF BRANCH LIBRARY

Populated and locked by Montana State Library. This is the area on all floors enclosed by the outer walls of the branch library. Include all areas occupied by the branch library, including those areas shared with other agencies and areas off-limits to the public. Do not report square footage of bookmobiles.

14.14 OUTLET LIBRARIAN FTE

All outlet staff with the title of librarian who do paid work that typically requires professional training and skill in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. Note: This number also includes the FTE of librarians with ALA-accredited master's degree, reported in 14.16.

14.15 OUTLET ALL OTHER FTE

All other outlet employees paid from the library budget, including operations, security, and maintenance staff.

14.16 OUTLET STAFF WITH MLS: ALA-MLS

Outlet librarians with master's degrees from programs of library and information studies accredited by the American Library Association. Note: Only count staff who both have the degree and have the title of librarian. Include Library Director FTE and Librarian FTE if they have an MLS.

Section 15 – COVID-19

15.1 WERE ANY OF THE LIBRARY'S OUTLETS PHYSICALLY CLOSED TO THE PUBLIC FOR ANY PERIOD OF TIME DUE TO THE CORONAVIRUS (COVID-19) PANDEMIC?

An outlet is considered physically closed when the public cannot access any library buildings or bookmobiles, regardless of staff access. A building can be physically closed but still offer virtual, Wi-Fi, or "curbside" services outside the building. PLS 510

15.2 DID LIBRARY STAFF CONTINUE TO PROVIDE SERVICES TO THE PUBLIC DURING ANY PORTION OF THE PERIOD WHEN THE BUILDING WAS PHYSICALLY CLOSED TO THE PUBLIC DUE TO THE CORONAVIRUS (COVID-19) PANDEMIC?

Services to the public can include activities such as answering calls, emails, or texts with answers to information requests from the public; hosting virtual programming or recorded content; offering "curbside", delivery (mail or drop-off), or drive-thru circulation of physical materials; managing IT services to ensure external Wi-Fi access; and providing other types of online and electronic services, regardless of the location of library staff when they provided services (i.e., working from home or in the building that was closed to the public). PLS 511

15.3 DID THE LIBRARY ALLOW USERS TO COMPLETE REGISTRATION FOR LIBRARY CARDS ONLINE WITHOUT HAVING TO COME TO THE LIBRARY DURING THE CORONAVIRUS (COVID-19) PANDEMIC?

Online library cards provide users access to electronic collection materials and databases without having to be physically present at a library outlet to register for the card. PLS 514

15.4 DID THE LIBRARY PROVIDE REFERENCE SERVICE VIA THE INTERNET OR TELEPHONE WHEN THE BUILDING WAS PHYSICALLY CLOSED TO THE PUBLIC DURING THE CORONAVIRUS (COVID-19) PANDEMIC?

Include references service provided via email, chat, and text. PLS 515

15.5 DID THE LIBRARY PROVIDE 'OUTSIDE' SERVICE FOR CIRCULATION OF PHYSICAL MATERIALS AT ONE OR MORE OUTLETS DURING THE CORONAVIRUS (COVID-19) PANDEMIC?

Includes any contactless or minimal contact provision of circulation items. Similar terms could include curbside, vestibule, or porch pickups, delivery (mail or drop-off), drive-thru, etc. PLS 516

15.6 DID THE LIBRARY INTENTIONALLY PROVIDE WI-FI INTERNET ACCESS TO USERS OUTSIDE THE BUILDING AT ONE OR MORE OUTLETS DURING THE CORONAVIRUS (COVID-19) PANDEMIC?

Includes "parking lot access", bookmobiles or other mobile facilities with Wi-Fi capabilities. PLS 520

15.7 DID THE LIBRARY INCREASE ACCESS TO WI-FI INTERNET ACCESS TO USERS OUTSIDE THE BUILDING AT ONE OR MORE OUTLETS DURING THE CORONAVIRUS (COVID-19) PANDEMIC?

Includes "parking lot access", bookmobiles or other mobile facilities with Wi-Fi capabilities. Increasing access could mean removing restrictions on sign-in authorizations, expanding router reach, leaving Wi-Fi service on 24 hours, installing, or moving access points to promote or improve external access, etc. PLS 521

15.8 DID LIBRARY STAFF WORK FOR OTHER GOVERNMENT AGENCIES OR NONPROFIT ORGANIZATIONS INSTEAD OF, OR IN ADDITION TO, THEIR NORMAL DUTIES DURING THE CORONAVIRUS (COVID-19) PANDEMIC?

Include reassignments to other government agencies (e.g., to process unemployment claims), as well as other activities such as the use of library staff to distribute school lunches and other materials. PLS 522

15.9 NUMBER OF WEEKS AN OUTLET CLOSED DUE TO COVID-19

This is the number of weeks during the year that due to the Coronavirus (COVID-19) pandemic, an outlet building was physically closed, and the public could not enter, when it otherwise would have been open. NOTE: Round to the nearest whole number. If building did not close to the public due to the pandemic, enter zero. The sum of data elements #714 and #715 should equal or be fewer than 52 weeks. An outlet is considered physically closed when the public cannot access any library buildings or bookmobiles, regardless of staff access. A building can be physically closed but still offer virtual, Wi-Fi, or "curbside" services outside the building. PLS 715

15.10 NUMBER OF WEEKS AN OUTLET HAD LIMITED OCCUPANCY DUE TO COVID-19

This is the number of weeks during the year that an outlet implemented limited public occupancy practices for in-person services at the library building in response to the Coronavirus (COVID-19) pandemic. NOTE: Round to the nearest whole number. If building did not have a limited occupancy or similar practice due to the pandemic, enter zero. Weeks can be counted in both data elements #714 and #716 (that is, a library was open to the public and implementing limited occupancy practices in the same week). Data element #716 should not be greater than data element #714. Limited public occupancy practices can include reduced hours open, limits on the number of public members inside the physical building, appointment only on-site library use, visitor time limits, closed stacks or meeting rooms, etc. PLS 716