

**Ministry of Heritage, Sport, Tourism and Culture Industries**  
**Annual Survey of Public Libraries**  
**Questions and Answers**  
(compiled by staff at the Ontario Library Service)

Updated April 20, 2021

	Question	Response
1.	Where do I find the Annual Survey?	The Annual Survey is completed in GO-Secure using a specific Ministry of Education (EDSC) database called LibStats. For this reason, libraries should never try to use Google to find the ASPL, because they are unlikely to get the right database. A link to the survey was provided to each library in the Launch e-mail from our Ministry
2.	I registered for GOSecure but don't see my library information	If you or your designate are new to filling out the Annual Survey, you need to register in GO-Secure. But then you also need to be granted administrative rights to access the Annual Survey. To do this, please send an e-mail to the Ministry advisors ( <a href="mailto:adam.haviaras@ontario.ca">adam.haviaras@ontario.ca</a> or <a href="mailto:rob.lavery@ontario.ca">rob.lavery@ontario.ca</a> ) to ask for administrative rights for their library. The Ministry staff know the names of every Library CEO across the province – including new CEOs and Interim or Acting CEOs
3.	I am having trouble with the Annual Survey. Where do I get help?	<ul style="list-style-type: none"> <li>• If it is a technical question (e.g. if you have a problem with your password or other technical issues, contact DDSB ITSupport (CSC) <a href="mailto:ddsb.itsupport@ontario.ca">ddsb.itsupport@ontario.ca</a> .</li> <li>• If it is content-related question, please contact SOLS staff (<a href="mailto:pmalcolm@sols.org">pmalcolm@sols.org</a>, <a href="mailto:ncooper@sols.org">ncooper@sols.org</a> or, for French enquiries <a href="mailto:ataylor@sols.org">ataylor@sols.org</a> )</li> </ul>
4.	Where do I start?	In the launch e-mail (January 26 <sup>th</sup> ), Ministry staff provided a blank survey to use as you collect the information. Once you get into GO-Secure, you will find a 'Definitions' document to cover EACH of the lines (you can also ask SOLS staff for a copy of this document). This FAQ is intended to provide additional clarification from that original 'definitions' document.
5.	How do I count active cardholders this year because we did not expire any cards?	<p>By definition you are to “state number of library cardholders who have used their library card in the past two years”. Given everything, we are okay with a 3 year count, if you didn't expire cards.</p> <ul style="list-style-type: none"> <li>- Depending on how you handle membership, the simple solution is to count total membership on a day during the typical week.</li> <li>- As suggested by IdeaExchange: If you keep the number of records of expiration dates by year before you changed the expiration date, you could run a report of “Patron created less than 01-01-2021 and expiration date greater than or equal to 01-01-2018. Then subtract the total expired patrons from the saved lists. This is likely a number very close to what you need – especially as many of you have implement online membership this year, so new memberships were occurring even during closure.</li> </ul>

**Section B (Finance)**

6.	How do I report B1.1 (Surplus-Deficit-Nil)	<p>Each library will answer this differently.</p> <ul style="list-style-type: none"> <li>• Some libraries moved any operating surplus at the end of the year into an operating reserve – if this your scenario, then mark the amount transferred INTO your operating reserve fund at B4.7. Then for the next year, you will mark B1.1 as nil (zero). Any money you move back into the operating account will be marked as a transfer back INTO the operating account at B2.7</li> </ul>
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7.	What data do I need to report related to Reserve Funds?	<p>Section B - Parts 2.0 and 4.0 are about operating funds and does not ask you to report the amount of money held in your library reserve funds.</p> <ul style="list-style-type: none"> <li>B2.7 asks you to report funds transferred into the operating account FROM the library’s reserve fund</li> <li>B4.7 asks you to report funds transferred from the library operating account into the library reserve fund.</li> </ul>
8.	Which benefits go in B4.2.1?	<p>Definitions document (p.11) says “B4.2.1 Employee benefits: Total amount spent on staff benefits, if applicable”</p> <p><b>IMPORTANT: There was a coding error for this line and so there has been a change. We would like libraries (at B4.2.2) to include all employee benefits, including health &amp; dental, pensions and MERC/Mandatory ones like employee portion of CPP, EI. At B4.2.1, you will just include wages/salaries</b></p> <p>Updated Feb 24/21 -</p>
9.	What about facilities/utilities in shared space or paid directly by the municipality and now showing on library financial statements?	<p>Definitions document (p.12) for B4.4 ask that “If the municipality, First Nation Band or county pays library related facility/utility costs, the amount of this payment should be included in the overall facilities/utilities expenditure. This amount is added to the amount shown on the local operating grant line B2.2 to reflect additional local support.” This might be heat, hydro, insurance. Also, if you are in a shared facility and do not get separate heat and hydro, try to find out the estimated cost paid by municipality and add that to Line B4.4 and also B2.2 to show municipal cost</p>
10.	How do I report unspent project funds?	<p>For Line B2.4 Project Grants – Report the TOTAL amount of the grant you received. Any spending you did this year against the grant money will show in the appropriate expense section (e.g., materials purchased). However, if you did not spend all the money, you will likely have a surplus in operating. This surplus will show in Line B1.1 in next year’s Annual Survey and you would show the amount (e.g., \$3400 left to spend next year using money from that grant</p>

### Section C (Holdings)

11.	Where can I find data related to Holdings prepared by SOLS staff?	<p>For Section C, SOLS staff provide information on specific holdings</p> <ul style="list-style-type: none"> <li>Holdings of the Provincial OverDrive collection (used in C0.3)</li> <li>Holdings of the Provincial French e-book collection (CANtook) (also C0.3)</li> <li>Number of electronic periodical titles in databased acquired under the Provincial Licensing program (used in C3.2.4)</li> </ul> <p>This document is posted on the SOLS Annual Survey page (<a href="https://www.sols.org/index.php/annual-survey">https://www.sols.org/index.php/annual-survey</a> )</p>
12.	What if I have other e-books?	<p>Section C0.3.5-C0.3.8 are about e-books and e-audiobooks. For the most part, libraries will add in either titles from OverDrive or CloudLibrary. We recognize that Hoopla has ebooks but you do not need to count those in this section (Hoopla is mentioned in C4.0). However, if you actually purchased specific e-book titles through another package such as Ebsco, then these would be counted toward your holdings in C0.3.5-C0.3.8</p>

13.	What about microfilm?	Record in C0.5 Special collections – as a digitized copy of original items (even though microfilm is an older technology and not always considered ‘digitized’)
14.	What about Gaming software?	Count gaming software in C0.3.1 and C0.3.2 if they are CD or DVD. <b>Although we realize that Nintendo Switch is actually a cartridge, please include the holdings for these items in that same section of C. then count lending of these Gaming Software items in Section F of the Annual Survey.</b>
15.	What about CloudLibrary and CloudLINK?	Instructions for counting holdings for CloudLibrary and CloudLINK are in the SOLS <a href="#">Section C Holdings document</a> . For holdings, you only count your own CloudLibrary and not what is in CloudLINK (because they only show if they are available to you).
16.	It's a bit confusing whether some products /services are databases or digital circ. C3.0 and C4.0	<p>The titles of the sections are a bit confusing – mostly because names of products have changed along with what they include in their product. Think about it this way: <b>For C3.0 – you are looking for a topic and use the database/index to find periodical articles to answer your questions. For C4.0 – you are looking for something to read or to view and end up downloading an e-magazine, newspaper, music, video to watch.</b></p> <ul style="list-style-type: none"> <li>• Step 1 - For C3.0 &amp; C4.0, start by looking at Part 4 SOLS Section C Holdings document – these are titles in Provincial Licensing program (e.g. Ancestry Library Edition, Canadian Reference Centre). If you have any of those specific titles (in Part 4), you will count in C3.2.0 (for # of subscriptions). If any of those products have periodicals within them, you add the corresponding number in C3.2.4.</li> <li>• Step 2 – Add other similar databases you might have – e.g. local history ones. <b>Other databases of this type which do not appear on the SOLS list would include CreativeBug, Explora Canada, Niche Academy</b></li> <li>• Step 3 – Make a list of all the other streaming/downloading services. For section C4.0, you only have to NAME what you have: These products are in the dropdown menu of the survey (Freegal, Freeding, Hoopla, RBDigital, IndieFlix, Flipster, Naxos). If you have these services: (<b>Kanopy, Press Reader, OverDrive Magazines</b>), put them in this section (C4.3) of the survey under Other</li> <li>• Step 4 – Later in the Survey, you will record the <b>USE</b> of those products (listed in Step 3) in Section F/Activities of the Annual Survey at F1.1/e-books, F1.2/e-audiobooks, F1.3/music, F1.4/video, F1.5/e-magazines and e-newspapers</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• You would not count these non-subscription titles: <b>The Canadian Encyclopedia</b> (its free), <b>Virtual Reference Library</b> (its free from Toronto Public) <b>or Our Digital World</b> (it is free to view – but if you have a subscription to enter your library historical records/photos into it, then count this database at C3.2)</li> <li>• Do not count <b>Cloud Library or OverDrive</b> – because the Ministry is collecting that information in C0.3.5 and C0.3.6</li> <li>• <b>Only count a title in one of the sections C3.0, C4.0 or C5.0</b></li> </ul>
17.	What about Great Courses found in Kanopy?	For the purposes of the survey – you will just list Kanopy in C4.0. We will hold C5.0 for those databases/services that are exclusively around e-learning such as Lynda.com, Gale courses. The use of ‘Great Courses by patrons will be recorded in Section F/Activities
18.	I don't get e-learning at C5.1	This is an ever-evolving section – The Survey specifically mentions: <b>Lynda.com</b> (now Linked In Learning), Gale Courses, Learning Express, Mango Languages, BrainFuse and RB Digital. <b>Rosetta Stone can go here as well.</b> With the sale/breakup of RB Digital, only include courses from the old RB Digital here, otherwise put RB Digital under streaming if videos or magazines (C4.0).

**Section D: (Staffing)**

19.	Due to the pandemic & temporary layoffs, I am not sure how to fill in the Counting staff requirement	In Section D, you are asked to count staff and volunteers at the library. Unfortunately, some library staff were laid off during shutdown period. We recognize that 2020 was a very strange year for statistics including counting staff. For the purposes of the Annual Survey, <b>please count the staff you had during the week that you selected for the Typical Week Survey.</b>
20.	For staff hours – we had some layoffs	<p>When in doubt for counting, use the typical week for staffing levels. In this case, however, that probably would not quite capture the summer students. But you could use averages for students or volunteers.</p> <p>In the Ministry’ posted ‘definitions’ document, there is a “varied hours” example for staff positions which addresses the idea of averaging which reads: “Varied Hours Example: If the hours worked by people in a job class vary, report the total average weekly hours worked. (e.g. if there are 2 people in the librarian job class, and one normally works 8 hours per week, and the other works 10 or 12 hours per week, report 2 people in the job class working a total of 19 hours per week.)</p>
21.	Where do we put the CEO?	The staffing section is about staff, regardless of function – that is, how many full time staff and how many part-time staff (with the number of hours report) PLUS what level of education your staff have. If your CEO does not have a university level library degree (Librarian) or college level library training (Library Technician) or EXCEL, then the person should be marked in “Other staff” – for either FT or PT (depending on how many hours they work in a week)

**Section E: (Facilities)**

22.	<p>Counting Public Access workstations in E1.1</p> <p><b>NEW</b></p>	<p>Count the various public computers in the library/library system and put that number in E1.1</p> <ul style="list-style-type: none"> <li>- Then “of that number” say how many provide Internet access (E1.1.1) and how many are dedicated as OPACs (E1.1.2) but it might not add to the number in E1.1 because you might have other computers in the library which do not have the Internet nor are they used as OPACs.</li> <li>- One example of that type of computer would be children’s literacy computers (e.g. AWE) which would go into E1.1 (as they are out there for the public to use) – but that is the only spot they would be recorded (not E1.1.1 or E1.1.2).</li> </ul> <p>You do need to count PC Reservation Stations (as they are not loaded with software except for the Reservation software). In the same way, you would not need to count those laptops/devices which are used exclusively to power other equipment e.g. for Smart Board, Vinyl Cutter. While useful to the library, they do not fit into this section’s definition of “public access computers” – and in the same way, the Annual Survey does not ask you for the number of computers exclusively used by staff in the library</p> <p>Note: Even those E1.1.4 is the total number of lending laptops, netbooks and tablets looks like it is connected to the Workstations question (E1.1.1, E1.1.2 or E1.1.3)– it is a separate question (and asks how many LENDING devices of that type you have).</p>
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23.	We were closed and now open with shorter hours than regular. What do I count?	In <b>Section E</b> , you are asked to state the hours for each site. We do realize that some branches were closed, hours were altered and so 2020 is a very strange year for all. For the purposes of the Annual Survey, <b>please count the hours you had during the week that you selected for the Typical Week Survey</b> . If you were closed during that Typical Week, count the number of regular hours you had in March 2020
24.	For physical distancing, once patrons could access computers, we put some away and covered some?	While E1.1 says to state the total number of public access workstations AVAILABLE in the library – and you made some “unavailable” for a portion of the year, for the purposes of this survey, state the number usually available to the public (because for a time, they were available)
25.	New question about square footage??	<p>“E7.0 Total Square Footage – E7.1 – In the space provided, please provide the total combined square footage of all the facilities in your library system.</p> <p>This was a question in the Annual Survey back in 1999 – and so, for those libraries who might by chance be in the same space as 1999, the figures for main and other branches are listed: <a href="http://www.mtc.gov.on.ca/en/libraries/statistics.shtml">http://www.mtc.gov.on.ca/en/libraries/statistics.shtml</a> Then pick Historical Statistics – 1999 – and find Columns GM, GN, GO for the square footage of your main branch and branches, as reported in 1999</p>

**Section F: (Library System Activities)**

26.	How do I report Annual Circulation statistics	<p>In <b>Section F</b>, you record circulation of different materials <b>FOR THE ENTIRE 2020 YEAR</b> (Note that in <b>section G</b> of the Annual Survey, you also report circulation but just for the Typical week period and you only report the circulation in two categories #1-print/DVD and #2-e-books, audiobooks, music and video)</p> <p>The Ministry’s ‘Definitions’ document (in the Help Tab on the ASPL page) has thorough definitions. Here is a summary:</p> <ul style="list-style-type: none"> <li>• <b>F1.0 – PHYSICAL ITEMS</b> - Report the total number of physical items charged out from your library’s collections for use outside the library. Include circulation of all print material + physical CDs + physical DVDs+ physical audio-books + non-traditional physical materials (ex. snow shoes)</li> <li>• <b>F1.1 – E-BOOKS</b> - Report the total number of all e-book downloads from your collection (one for each checkout and one for each renewal) AND circulation of ebooks from streaming and downloading services (ex. Hoopla) by your library users.</li> <li>• <b>F1.2 – E-AUDIOBOOKS</b> – use same guidelines as F1.1</li> <li>• <b>F1.3 – Digital MUSIC</b> - Report the total number of all digital music downloads from your collection. Count one for each item (ex. an entire album) or title (ex. an individual song) charged out or accessed, and one for each item renewal. Include the circulation of albums or song titles from streaming and downloading services (ex. Hoopla) by your library users. KEY: It is not your holdings of digital materials BUT just the number of downloadable albums or song titles that your patrons borrow or renew.</li> <li>• <b>F1.4 – Digital VIDEO</b> – use same guidelines as F1.3. Include ones from Kanopy, Hoopla and the like. KEY: The circulation of physical videos and DVDs go in F1.0</li> </ul>
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		<ul style="list-style-type: none"> <li>• <b>F1.5 –E-Magazine Downloads.</b> Include the circulation of e-magazine titles from periodical databases and downloading services (ex. Zinio) by your library users. Not holdings but circulation. In this section, include use of e-newspapers (for example, from Press Reader)</li> </ul>
27.	I use the JASI system, how do I get my circulation statistics?	F1.0 - OLS-North developed instructional videos explaining how to run JASI reports for ten of the ASPL fields. These are posted on the OLSN YouTube channel. <a href="#">Watch the videos.</a>
28.	How do I report Program Attendees statistics	<p>Please check the Definitions document for more detail on programs, but there is a new clause in Section F on how to count attendees which reads: How to count program attendees. –</p> <ul style="list-style-type: none"> <li>• For live/in person programs, count the number of attendees</li> <li>• For live programs on a virtual/online platform, count the number of registered attendees or the number of people appearing on the screen (Zoom, Microsoft Teams or otherwise).</li> <li>• If the virtual/online program was recorded and then posted on the library website or on a platform such as YouTube or Facebook, collect the views of that recorded program over the entire survey year and record them under ‘number of attendees’. Within the context of counting program attendees, please do not include quick views (e.g., of under one minute) or “likes” of a program.</li> </ul> <p>For the number of program attendees, you are counting program attendees during the calendar year – Jan to Dec. If a program is still posted in Jan of 2021 – those stats would count toward the next year. We want to emphasize that this is about PROGRAM attendance not just social media presence. We know that programs have moved online, so this section is really about “did they participate and/or view the program that was prepared or presented by the staff”</p>
29.	Where do I report Passive program statistics	<p>In the past, there was a line in <b>Section F</b> for Programs to say: “it can also be passive programming”. This line was removed as many thought it was just promotion or displays on a theme. However, if you do scavenger hunts or crafts available throughout the day (which require staff preparation and include instruction), you can count these as a program – count one program for each “set” (e.g. individual crafts) and assume one attendee per craft picked up (even if 2 kids might work on it at a time).</p> <p>If you post crosswords and jigsaw puzzles – AND consider them to be part of your programming offerings with library introduction or explanation, then you can count toward program. If they are just a social media post, then do not count in programming section.</p>
30.	There were lots of changes to services in 2020. How do we account for these changes?	<p>There are many questions about how to count specific items that are going out through curbside pickup. Here are some important considerations:</p> <ul style="list-style-type: none"> <li>• If you created a craft or activity kit (such as a ‘learn to crochet’ kit – and provided printed instructions or set a specific time for an online instruction via Zoom or other, count this as a program in Section F. Assume 1 attendee per item given out. For example, if you created a ‘Kid’s Christmas ornament’ kit and handed out 100 of them, then you would count 1 program under ‘other children’s programming’ and 100 under ‘number of attendees’.</li> <li>• If you do book/materials bundles (e.g. on a theme, specific authors, etc.) those items are counted in circulation and not under programming.</li> </ul>

		Note: If the staff created the book bundle based on an online form or a telephone or email conversation, be sure to count these as Readers' advisory questions in G1.4.3 if the transaction took place during the Typical Week Survey
31.	Where do I find the Interlibrary Loan statistics?	For those on VDX, the VDX Monthly ILL Statistics report provides the data required in the interlibrary loan section (Section F3.1). <a href="#">Learn More</a> . For those using mediated services (SOLS staff), contact Linda Langedijk <a href="mailto:llangedijk@sols.org">llangedijk@sols.org</a> for your statistics.

### Section H: Partnerships

32.	How to count Education Sector Partnerships?	<p>You should count each university or college separately – so if you have a partnership with York and with Ryerson – count 2 (even though both are universities).</p> <p>Remember that a partnership is more formal – perhaps an agreement to keep certain reading materials in your collection or to allow students to access specific computers for longer than your usual allocation time or to use a specific study space. It could also include a partnership to proctor exams for students.</p> <p>If you have a program such as a university/college fair – where some representatives come to talk to the students – then just count that in F2.3 - it could be Teen programming or it could be careers/job skills – depending on the focus of your event.</p>
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