Public Libraries Annual Report

Monday, Nov. 8, 2021
Virtual

What is the Annual Report?

○ The report is a statistical overview of a year in the life of a public library.

○ Most questions are determined by IMLS (Institute of Museum and Library Services) with input from each state library.

○ Some questions are specifically added by the Vermont Department of Libraries.

Who Uses the Info in the Report?

National

- Institute of Museum and Library Services
- Federal Government
- Other State and Public Libraries Nationwide

State

- VT Department of Libraries
- State Government

Local

- Your Library
- Members of the Public

When Is the Report Due?

- The Report is due every year

- Opening Date for 2021 – Oct. 28, 2021

- Due Date for 2021 – Dec. 31, 2021

- Extension available (by request) to Jan. 14, 2022

What Time Period does it Cover?

- This part can be confusing.
- Individual libraries use many different fiscal years:
    - Calendar Year (Jan 1-Dec 31)
    - Traditional Fiscal Year (July 1-June 30)
    - Federal Fiscal Year (Oct 1-Sept 30)
    - and others!

What Time Period does it Cover? (cont'd)

- Submit your last fiscal year that ended by Oct. 15:
  - If you follow the traditional (July-June) or Federal (Oct-Sept) fiscal years, submit the current year (2020-2021 in this case).
  - But if you follow the calendar year (Jan-Dec), you should submit last year's data (2020). I know this seems weird.
  - Note – A few libraries are off-schedule. Please reach out, and we can go through options.

Updated Questions

- Changes to questions:
  - Programming categories have expanded significantly. Now there are three different locations (on-site, off-site, and virtual), and two more age categories (Ages 0-5, 6-11, 12-18, 19+, and general audience)
  - Non-Traditional Items – Number in your collection, and overall circulation
  - Grants Received – Instead of asking for amounts for each grant, we have checkboxes for the ones you received, and then totals for state, federal, and other grants.
  - Fines – We've added a question that asks if you charge fines (but not the amount).
  - The What's New and Successes narrative questions from the end of the report will be moved to a separate survey that comes out every six months.
  - Most of our COVID questions are still in the report.
  - Simplification of language

Basics of the Report

- If you need login info, ask Josh.

- You can work on the report in any order. You can stop and come back to the report as often as you would like, just make sure to click *Save* when you stop.

- Click *Show Last Year's Answers* in the upper-right hand corner to see last year's data. I usually recommend having this on at all times.

- If you're not sure about anything, ask Josh.

- We removed the individual instructions for questions and focused on making the questions as self explanatory as possible.

Important Notes

○ One at a Time - Avoid having more than one person (or even more than one tab) logged in to the survey site at once. It's easy for data to get overwritten.

○ Browser Buttons - Avoid using your browser's back and forward buttons within the survey site. Instead use the site's *Prev / Next* buttons and the left side navigation to move between the pages. The survey is made to save content when any of those are clicked, while forward and back can cause it to lose filled-in information or otherwise behave strangely.

○ Browsers - Google Chrome or recent versions of Microsoft Edge seems to work best (if available). Mozilla Firefox should work, but could have quirks. Please avoid old versions of Microsoft Edge.

Report Overview

- Directory Info
- Staffing
- Space
- Operating Income
- Capital Revenue
- Operating Expenditures
- Holdings
- Services

Directory Info

- Contact info (prefilled)
- Current librarian and chair of the trustees
- Weeks open per year (incl. COVID Questions)
- Hours open per year (incl. COVID Questions)
- Population of service area (prefilled)

A. Directory Information

SHOW LAST YEAR'S ANSWERS

IMPORTANT REMINDER – Data for this report should come from your last fiscal year completed by Oct 15, 2021. This means that libraries who follow the calendar year should submit data from Jan 1 - Dec 31, 2020. Calendar year libraries who are off schedule should reach out to Josh to confirm their reporting period. The only exceptions are questions A01–A17, which should be answered as of today.

If you have questions about your reporting period, or any aspect of the report, please contact Joshua Muse at the Vermont Department of Libraries at joshua.muse@vermont.gov or (802) 585-8056.

Note:

- If it's a question about something your library does not do or have, enter 0 (for numerical fields) or N/A (for text fields).
- If you don't have the data to answer to the question, enter -1 (for numerical fields) or N/A (for text fields).

A01 Name of Library:

FLAG   NOTE

A01a Town

FLAG   NOTE

A02 Library Telephone Number (no spaces, dashes, or parentheses):

FLAG   NOTE

A03 Mailing Address - Street or PO Box:

FLAG   NOTE

Staffing

- Weekly hours for:
  - Librarians with MLS
  - Librarians with Public Library Certification
  - Librarians without MLS
  - All other staff
  - Volunteers

B. Staffing

Librarians:

Do you have paid staff?

- If you have paid staff, enter the relevant numbers in B01a, B01b, B01c, B03 and B05. If any are zero, please enter 0.
- If you don't have paid staff, please enter 0 in B01a, B01b, B01c, B03 and B05.

B01a Weekly Paid Hours - Librarians with an ALA-accredited Master's Degree. Do not include staff working in non-librarian jobs, such as circulation clerk, even if they hold an MLS. If zero, please enter 0.

FLAG   NOTE

B01b Weekly Paid Hours - Librarians who have completed a VT Certificate of Public Librarianship by the end of the reporting period. Do not include staff working in non-librarian jobs, such as circulation clerk, even if they have earned a certificate. If zero, please enter 0.

FLAG   NOTE

B01c Weekly Paid Hours - Librarians without an accredited Master's Degree or Certificate. Do not include staff working in non-librarian jobs, such as circulation clerk. If zero, please enter 0.

FLAG   NOTE

B02 TOTAL WEEKLY HOURS PAID TO STAFF HOLDING THE TITLE OF LIBRARIAN. (system calculated, (B01a+B01b+B01c)

FLAG   NOTE

Space

- Square footage of library. This is pre-filled, but let us know if it's out of date or wrong.

C. Space

SHOW LAST YEAR'S ANSWERS

C01 What is the current square footage of your building? (This value has been entered, based upon data reported in previous years. If there is an error, please contact Joshua Muse)

FLAG NOTE

N/A

PREV NEXT

Operating Income

- Includes (almost) all Library income:
  - Local tax support
  - Non-resident fees
  - Donations/gifts
  - Transfer from endowment/investments
  - Grants
  - In-kind support (free service like plowing)

D. Operating Income by Source : Part 1   SHOW LAST YEAR'S ANSWERS

Funds used to provide library services.

When reporting on income, do <u>not</u> include cash on hand at the beginning of the fiscal year. Do <u>not</u> include income appropriated or collected for: (1) major capital expenditures, (2) as restricted contributions to the endowment, savings or for special purposes, or (3) income passed through to another agency. Capital Revenues are only reported in Section E. Restricted contributions are not reported.

Local Tax Support:

D01, D02 - Enter the town where the library is located and the tax support it provides on Lines D01 and D02; if you receive no tax support from the town, enter 0 for D02.

Note: If your town pays library employee salaries and benefits (e.g., FICA or medical insurance) directly, but outside of the library budget, these payments should be included here. If so, please contact the Town Clerk or Treasurer to obtain these numbers.

If your library's tax support came from more than one municipality, provide each Municipality name and the amount contributed by using the "Add Town" button. You can add as many "Towns" as you need. If you click the "Add" button by mistake, simply click the "Remove" button to undo it.

D01 Town:

[   ]   FLAG   NOTE

D02 Amount:

[   ]   FLAG   NOTE

REMOVE GROUP   **ADD GROUP**

Capital Revenue

- Revenue used for major capital projects.

Operating Expenditure

- Includes all funds spent:
  - Collections
  - Staff (salaries and benefits)
  - Operating expenditures
  - Grant projects
  - Capital expenditures

F. Operating Expenditures : Part 1

Current and Recurrent Costs Necessary to Provide Library Services.

Include library expenditures as well as verifiable amounts spent by or **on behalf** of the library by local government, Friends groups or Trustees, even though these amounts do not flow directly through library accounts. These are amounts for which you or the group could produce a receipt or other paper trail, if necessary.

Collection Expenditures:

Can you specify the amounts of money spent on print materials, electronic resources and, other materials?

- If you can specify the amounts of money spent on print materials, electronic resources and other materials, enter those amounts in F01, F02 and F03. If any are zero, please enter 0.
- If you have a total amount spent on collections, but can't separate print, electric and other materials, enter that amount in F04 and enter 0 in F01, F02, F03. If you are unable to fill in any of the categories (e.g. electronic or other), but know that the amount spent was higher than zero, you should do this as well.
- If you don't know how much money was spent on materials and resources, please enter 0 in F01, F02, F03, and enter -1 in F04.

F01 Amount spent for print materials.

FLAG   NOTE

F02 Amount spent for electronic resources. This includes costs for downloadable services like Overdrive or Hoopla, and online databases such as Ancestry or Consumer Reports. Do not include costs for your ILS or any computer or networking equipment.

FLAG   NOTE

Holdings

- Print materials
- Video items
- Audio items
- Downloadable ebooks & audiobooks
- Print magazine & newspapers
- Non-Traditional items
- Online databases

G. Holdings in Library Collection : Part 1

Report the total holdings at the end of the fiscal year. Note: materials for "children" generally refers to materials for people under the age of 14. If you do not separate and count library holdings by age, simply fill in the "total" column. If the answer is zero, please use a zero.

Downloadable/streaming files with a pay-per-use model (such as Hoopla, Kanopy, Zinio, and the like) should not be included under Holdings.

Print materials:

Can you specify the size of your holdings of adult and children's print materials in your collection?

- If you can specify the size of holdings of adult and children's print materials, enter those numbers in G01 and G02.
- If you have a total number of holdings in print collection, but can't separate adult and children, enter that number in G03 and enter 0 in G01 and G02.
- If you don't know the size of your holdings, please enter 0 in G01 and G02, and -1 in G03.

G01 Adult:

FLAG   NOTE

G02 Children:

FLAG   NOTE

G03 This line is for a TOTAL amount of the size of your entire collection, if you can't break out materials for adults and children. Please enter your data here.
If you have entered data for the sub-categories above, please do not make any entry on this line.

FLAG   NOTE

Services

- Registered borrowers
- Visits
- Reference questions
- Electronic item circulation
- Online database usage
- Physical item circulation (children/adult)
- Curbside pickup
- Non-Traditional circulation
- ILL's loaned/received
- Programs and attendance
- Outreach (deliveries)
- Public computers owned & usage
- WiFi usage
- Visits to your website

H. Services : Part 1

SHOW LAST YEAR'S ANSWERS

If counts are available, please report them. Otherwise, provide estimates based on a few typical weeks, and multiplied to create a yearly total.

Registered borrowers:

Can you specify the number of adult or children registered borrowers?

- If you can specify the number of adult and children registered borrowers, enter those numbers in H01 and H02.
- If you have a total number of registered borrowers, but can't separate adult and children, enter that number in H03 and enter 0 in H01 and H02.
- If you don't know how many registered borrowers you have, please enter 0 in H01 and H02, and -1 in H03. If you use "family cards", or otherwise do not have this data, please do the same.

H01 Number of adults:

FLAG   NOTE

H02 Number of children: (use your library's age definition, though the IMLS definition is under 14)

FLAG   NOTE

H03 This line is for a TOTAL of all your registered borrowers. Please enter your data here.
If you have entered data for the sub-categories above, please do not make any entry on this line.

FLAG   NOTE

H04 TOTAL BORROWERS (system calculated, H01 + H02 + H03)

FLAG   NOTE

What is an Edit Check?

- Once you have entered all of your data, click *Status* in the menu. This will show if you need to complete any edit checks.

- An edit check occurs when the system thinks the data in a field looks weird. Typically, this means it's significantly higher or lower than last year.

- You'll need to give an explanation for the difference - we did more programming, our children's librarian was out, the entire staff was abducted by aliens.

- Once you've entered all of your checks, click *Submit Corrections* at the bottom of the page. If everything has a green check, you are set. If you see a red X, you still need to adjust something.

- If you have a question, or it's not letting you go on, just contact Josh.

Final Steps

- Include your name and title
- Director and chair of trustees certify
- Complete!

I. Annual Report Final Questions and Signature

SHOW LAST YEAR'S ANSWERS

Instead of asking our narrative questions (successes and what's new) in the annual report, we're going to ask for them in a separate survey every six months. We hope this will lead to timelier info, and make the report a couple of questions shorter.

I01 Name of the person who completed this report:

FLAG   NOTE

I02 Title/Position of the person who completed this report:

FLAG   NOTE

I03 DATE:

FLAG   NOTE

CERTIFICATION

SHOW LAST YEAR'S ANSWERS

I have examined this application, and I hereby certify on behalf of the library that

1) the information provided is true and correct; and

2) all requirements for a complete application have been fulfilled; and

3) the library authorizes the State of Vermont Department of Libraries to verify the information provided, if necessary.

Librarian:

FLAG   NOTE

Date:

FLAG   NOTE

Chairperson, Board of Trustees:

FLAG   NOTE

Date:

FLAG   NOTE

PREV   NEXT

What Happens After You Submit?

- Libraries fill out the form completely and respond to all edit checks.

- Director and Head of Trustees certify the form.

- Josh will make the draft data available immediately in a spreadsheet.

- Josh chases down late submissions.

- Josh submits to the IMLS portal. This is a back and forth process, where I slowly resolve hundreds of minor issues, before the system accepts the data.

- IMLS staff come back with any remaining questions on the data.

- State Librarian certifies the form.

- Complete!

Changes in 2021

- Programming categories have expanded significantly. Now there are three different locations (on-site, off-site, and virtual), and two more age categories (Ages 0-5, 6-11, 12-18, 19+, and general audience)

- Non-Traditional Items – Number in your collection, and overall circulation

- Grants Received – Instead of asking for amounts for each grant, we have checkboxes for the ones you received, and then totals for state, federal, and other grants.

- Fines – We've added a question that asks if you charge fines (but not the amount).

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- Most of our COVID questions are still in the report.

Programming Changes (2021)

- This year, IMLS has expanded the categories in programming

- Programs and attendance are both broken down by location (on-site, off-site, and virtual)

- For each location, numbers are further broken down by age (0-5, 6-11, 12-18, 19+, and general audience)

- We know you probably don't have all of these numbers this time around!

Programming

This is a count of all library-sponsored programs. This year, the age categories have expanded to separate out children 0-5, as well as programs for a general audience. This is a transitional year, so if those new numbers aren't available, just enter a zero (0). If the answer is zero, enter a zero (0).

- Off-site programs are held anywhere beyond library property.
- Virtual programs are broadcast live on a website or social media platform, and allow viewers to interact or comment. It does not include later views, or pre-recorded content.
- Ages indicates the primary intended audience. General interest includes all-age, family, and intergenerational program sessions. In ambiguous cases, use your best judgement.

H19a Number of Onsite Program Sessions Intended for Children Ages 0-5

FLAG   NOTE

H19b Number of Onsite Program Sessions Intended for Children Ages 6-11

FLAG   NOTE

H19c Number of Onsite Program Sessions Intended for Young Adults Ages 12-18

FLAG   NOTE

H19d Number of Onsite Program Sessions Intended for Adults Age 19 or Older

FLAG   NOTE

H19e Number of Onsite Program Sessions Intended for a General Audience

FLAG   NOTE

Non-Traditional Items (2021)

- New questions ask about the number of non-traditional items in your collection, and the number of times they circulated. This includes a huge range of items (from muffin tins and skateboards to puzzles and hammers) that can be checked out by patrons.

- If items are packaged and checked out as a set, they should only count as one item.

- Circulation for non-traditional items should also be included in the main physical circulation questions (H12-H14).

Grants Received (2021)

- We've simplified the grants received questions a bit this year.

- First, you'll see a series of checkboxes asking which grants you received in the year.

- Secondly, you'll be asked for the total received of state grants, federal grants, and other grants.

Other Changes (2021)

- There's a new question that asks if you charge fines, but not how much your fine total is.
- We've removed the two narrative questions (What's New and Successes) from the end of the survey. Going forward, they'll get their own survey which will come out twice a year.

Thanks!!!

- Thanks to everyone for attending today!
- And thanks for all the time and effort that you put into the Annual Report!