

# Public Libraries Annual Report

Thursday, Nov. 2, 2023  
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
- The submission window for this year is Oct. 16 through Dec. 30, with an optional extension to January 19.

# 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)

- Rule 1 - Whatever you did last year, do the year following it, unless your library's fiscal year has changed.
- Rule 2 - In general, 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 (2022-2023 in this case).
  - But if you follow the calendar year (Jan-Dec), you should submit last year's data (2022). I know this seems weird.
  - Unless you already submitted calendar 2022 last year, in which case we should talk!
- Rule 3 – If you have ANY questions at all about reporting period, please reach out to Josh before you start reporting!

# Updated Questions

## Changes to questions:

- Weeks open and hours open questions are simplified. There are no covid closures, limited access, or appointment questions, just number of weeks and hours open.
- Facilities – The facilities questions will auto-populate with last year's answers, and only need to be updated for changes/corrections.
- Revenue – The in-kind yes/no questions will auto-populate with last year's answers, and only need to be updated for changes/corrections.
- Services – The curbside circulation question has been dropped.
- COVID – The COVID yes/no questions have been dropped.
- No more -1's – If you don't know the answer, enter N/A.

# Seeing the Entire Question

Help Icon - We strongly recommend getting in the habit of clicking the help (?) icon when answering each question that has one.

This will give you the entire language of the question, and not just the title, and should help significantly with answering questions.



# Moving Away from Invented Estimates

Our intention over the next two years is to move away from estimates that aren't based on sample data. Going forward, estimates should come from one or more sample weeks, multiplied to create an estimate for the entire year. Ideally, you should choose periods that are not known for being atypically busy or quiet.

For example, a library could count reference questions for two weeks in May and two more in October, to create a solid estimate. Or a library could choose two sample periods and capture any stats they don't always gather.

Libraries shouldn't feel any hesitation to enter N/A (not available) whenever there is a number they don't have, especially moving forward. Ultimately, we would rather have no data than invented data.

# Basics of the Report

- If you need login info, ask Josh. We'll send out an email once we know the submission start date.
- 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. Don't struggle for 3 hours and then ask Josh, just ask Josh.

# Important Notes

- One Person at a Time – Avoid having more than one person logged in to the survey site at once, or even have it open in more than one tab. 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 and 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
- Facilities
- Operating Income
- Capital Revenue
- Operating Expenditures
- Holdings
- Services

# Directory Info

- Contact info (prefilled)
- Current librarian and chair of the trustees
- Weeks open per year
- Hours open per year
- Population of service area (prefilled)
- Reporting period

## 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](mailto: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:



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A01a Town



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



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A03 Mailing Address - Street or PO Box:











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# Staffing

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

B. Staffing		SHOW LAST YEAR'S ANSWERS
<b>Librarians:</b>		
<b>Do you have paid staff?</b>		
<ul style="list-style-type: none"><li>• If you have paid staff, enter the relevant numbers in <b>B01a</b>, <b>B01b</b>, <b>B01c</b>, <b>B03</b> and <b>B05</b>. If any are zero, please enter 0.</li><li>• If you don't have paid staff, please enter 0 in <b>B01a</b>, <b>B01b</b>, <b>B01c</b>, <b>B03</b> and <b>B05</b>.</li></ul>		
<b>B01a</b>	Weekly <u>Paid</u> 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.	<input type="text"/>  
<b>B01b</b>	Weekly <u>Paid</u> 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.	<input type="text"/>  
<b>B01c</b>	Weekly <u>Paid</u> 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.	<input type="text"/>  
<b>B02</b>	<b>TOTAL WEEKLY HOURS PAID TO STAFF HOLDING THE TITLE OF LIBRARIAN.</b> (system calculated, (B01a+B01b+B01c))	<input type="text"/>  

# Facilities











- These questions are pre-filled with last year's answers, though you can make any changes you need.
- Square footage of library/branch
- What year was the library/branch built, expanded, and renovated?
- How well does the building's size and condition meet your needs?
- Meeting room info
- Who owns your building?

### C. Facilities

SHOW LAST YEAR'S ANSWERS

These questions focus on your library facilities. Questions C01-C08b ask about the main library, while C09-C15c ask about a branch or secondary building. Answers have been pre-filled based on last year's submission, except for C05, C06, C13, and C14. If you do not know the answer, please enter N/A.

**Main Library:**

C01	Square Footage of Outlet	<input type="text" value="N/A"/>	 FLAG	 NOTE
C02	In what year was the library building originally built?	<input type="text"/>	 FLAG	 NOTE
C03	In what year was the most recent major construction (addition or major renovation)?	<input type="text"/>	 FLAG	 NOTE
C04	In what year was the most recent refresh (painting, carpet, etc)?	<input type="text"/>	 FLAG	 NOTE
C05a	Size – How well does the current size of the building meet the needs for public service?	<input type="text"/>	 FLAG	 NOTE

# Operating Income

- Includes (almost) all Library income:
  - Local tax support
  - Grants
  - Non-resident fees
  - Late fees
  - Fundraising, donations, and interest
  - In-kind support (yes/no)

## D. Operating Income by Source : Part 1

SHOW LAST YEAR'S ANSWERS

### Funds used to provide library services.

When reporting on income, do not include cash on hand at the beginning of the fiscal year. Do not 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:



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D02 Amount:



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REMOVE GROUP

ADD GROUP



# Capital Revenue

- Revenue used for major capital projects.

E. Capital Revenue by Source		SHOW LAST YEAR'S ANSWERS	
<p>Revenue <u>used for major capital projects or improvements</u> such as site acquisition, new buildings, additions or renovations, furnishings for new or expanding buildings, library automation systems, and other <u>major one-time contributions</u>. Do not include appropriations or contributions for normal operations or for endowment or savings.</p> <ul style="list-style-type: none"><li>• If you received capital revenues, enter amounts in E01, E02, E03 and E04. If any are zero, please enter 0.</li><li>• If you did not receive any capital revenues, enter 0 in E01, E02, E03 and E04 and continue to the next section.</li></ul>			
E01	Local government capital revenue (not revenues appropriated for normal operations.)	<input type="text"/>	 
E02	State government capital revenue (not revenues appropriated for normal operations.)	<input type="text"/>	 
E03	Federal government capital revenue (not revenues appropriated for normal operations.)	<input type="text"/>	 
E04	Other capital revenue (including grants and fund-raising, but not revenues raised for normal operations.)	<input type="text"/>	 
E05	<b>TOTAL CAPITAL REVENUE.</b> (system calculated, E01 + E02 + E03 + E04)	<input type="text"/>	 

# Operating Expenditures

- Includes all funds spent:
  - Collections
  - Staff (salaries and benefits)
  - Programming
  - Other expenses
    - Building operations
    - Technology
    - Other
  - Capital expenditures

## F. Operating Expenditures : Part 1

SHOW LAST YEAR'S ANSWERS

### 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.



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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.



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# Holdings

- Print materials
- Video items
- Audio items
- Downloadable ebooks & audiobooks
- Print magazine & newspapers
- Non-Traditional items
- Online databases
- (All broken down by age categories)

## G. Holdings in Library Collection : Part 1

SHOW LAST YEAR'S ANSWERS

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:



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G02 Children:



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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.



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# Services

- Registered borrowers
- Visits
- Reference questions
- Downloadable item circulation
- Online database usage
- Physical item circulation (children/teen/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:



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



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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.



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



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# 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
- What's new at your library
- Share feedback on the report
- 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!

# Thanks!!!

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