

Annual Report for Public and Association Libraries 2023

Instruction Brief By Section

Important

- Doublecheck email addresses since many have changed.

General

- Data scope (calendar, year, fiscal year, etc.) is noted in each section below.
- Please see DLD Annual Report Instructions for complete updates and changes.
- Federally–required question numbers are marked in red on the full instructions.
- New questions are optional for the first year
- On the Edit Check Review page, when an Edit Check is resolved with a note, the red exclamation point becomes a large green check mark. Note that All Edit Checks must have green check marks before the report can be submitted.

Tips and Tools

- To avoid loss of data,
 - Save early and often. Data entered is not saved until you use the Save button.
 - The Save button is located at the top and bottom of each page. On some pages, you may have to scroll down
 - Auto calculating fields do not calculate until the page is Saved.
- Only one person at a time should be logged into a member library report and reports from two different years should not be open at the same time.
- For questions that are pre–filled or pre–filled and locked, review the data and update, correct, or annotate, if needed
- For questions with repeating groups, last year's answers for repeating groups cannot be displayed
- To print the report with page numbers, click on the Printer icon in the menu at the top of the page, go to “Show Web Report” and then Control-P for Print.

Part 1 - General Library Information

- Report all information in Part 1 as of December 31, 2023, except for questions related to the current library director/manager (questions 1.37 through 1.44).
- In the 2023 State Survey, 1.49 has no question information. From the survey portal: For the reporting year, has the library experienced any unusual circumstance(s) that affected the statistics reported (e.g., natural disaster, fire, closed for renovations, massive weeding of collection, etc.)? If yes, please annotate explaining the circumstance(s) and the impact on the library using the Note; if no, please go to Part 2, Library Collection.

Part 2 - Library Collection

- Report holdings, additions, and subscriptions as of the end of the fiscal year.
- This section of the survey (2.1-2.25) collects data on selected types of materials. *Materials such as microforms, loose sheet music, maps, and pictures are reported in questions 12.6, 12.7 and 12.8.*
- Must be cataloged and available for use.

- 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.
- Do not include items freely available without monetary exchange.
- Count electronic materials at the administrative entity level (main library); do not duplicate numbers at each branch.
- 2.9 Total Print Serials - Enter the number of volumes held, including duplicate copies of volumes, regardless of whether the material is bound, unbound or on microform.

Part 3: Library Programs, Policies, and Services

- Report 3.1 through 3.32 as of the end of the fiscal year
- Report 3.33 through 3.77 for the 2023 calendar year
- Program sessions and attendance are numbered together by category, for example,
 - 3.17a Number of Sessions Targeted at Children Ages 0-5
 - 3.17b Attendance at Sessions Targeted at Children Ages 0-5
- Include Program sessions with attendance of zero or one if they were intended for a group.
- Take & Make kits that are not part of a live program such as a story hour.
 - Report Take & Make kits that are left out for patrons to pick up under Q3.31, One-on-One Program Sessions
 - Report each kit picked up as one attendee in Q3.32 One-on-One Program Attendance.

Renamed and Restructured Sections

- Program sections have been restructured and renamed
 - Library Sponsored Programs
 - Teen Led / Promotion / Summer Reading
 - Early Literacy
 - Adult Literacy
 - ESOL /Digital Literacy
- Summer Reading, Early Literacy, Adult Literacy, ESOL, and Digital Literacy are Yes/No questions.
 - If Yes is entered, subsequent answers are required.
 - If No is answered, the rest of the questions in that section will disappear.

Restructured Questions

- Q3.4 – 3.10 Written Policies. These questions will be pre-filled with prior year answers but not locked to allow changes if needed.
- Q3.14 Accessibility. This is now an if/then question only requiring subsequent answers if Yes is entered.
- Q3.17-3.32 Program Questions
 - *Synchronous* has been changed to *Live* and *Asynchronous* has been changed to *Prerecorded*.
 - There are now three subsections
 - *Live Programs Categorized by Age*
 - *Live Programs Categorized by Venue*
 - *Prerecorded and One-on-One Programs*

- All programs counted in Questions 3.33 through 3.77 (Summer Reading, Early Literacy, English Speakers of Other Languages and Digital Literacy) are also included in the figures reported in questions 3.17a through 3.28 including live, virtual program sessions and program attendance.

Part 4 - Library Transactions

- Report all transactions as of the end of the fiscal year.
- Internal Library usage is not considered part of circulation.

Reference

- A reference transaction includes information and referral service as well as **unscheduled** individual instruction and assistance in using information sources.
- Do not include directional transactions in the report of reference transactions.
- Duration should not be an element in determining whether a transaction is a reference transaction.

Interloan

- Use WLS-supplied numbers for 4.21 Materials Received and 4.22 Materials Provided. The data dashboard circ numbers (which is where your numbers probably come from) include checkouts and renewals. The Annual Report asks for only the number of items received or supplied, so it doesn't include renewals.

Part 5 - Technology and Telecommunications

- Report all information as of December 31, 2023.

Part 6 - Staff Information

- Report figures as of the last day of the fiscal year.
- Include the FTE for all positions funded in the library's budget whether filled or vacant.
- Convert part-time hours to full-time equivalents (FTE). To compute the FTE of employees in any category, take the total number of hours worked per week for all budgeted positions in that category and divide that total by the number of hours per week the library considers to be fulltime.
- Report the FTE to two decimal places.

2023 Changes to Part 6: Staff Information

- Q6.6 and Q6.7 Previous questions relating to Librarian (certified). These now simply state Librarian, with revised definition of "Librarians with master's degrees from programs of library and information studies accredited by the American Library Association."
- Q6.18 and Q6.19 Previous questions relating to Entry Level Librarian (certified). These now simply state Librarian.

Part 8 - Public Service Information

- Report all information as of the end of the fiscal year
- PUBLIC SERVICE OUTLETS - Libraries reporting main libraries, branches and bookmobiles should complete Service Outlets Information in Part 9.

2023 Changes to Part 9: Service Outlet Information

- Report all information as of the end of the fiscal year
- Most fields will be pre-filled with prior year answers but not locked to allow changes if needed.

2023 Changes to Part 10: Officers and Trustees

- Report information about trustee meetings as of December 31, 2022 **EXCEPT** list Officers and Board Members (10.9-10.23 and individuals' information 1-7) as of February 1, 2024.
- Complete one record for each board member. There must be a record for each voting position, whether filled or vacant. Do not include non-voting positions.
- Range and term questions have been simplified and are pre-filled (not locked).
- Board President section has been removed and will now be entered as a repeating group along with the other trustees. Please make sure to check for needed changes, especially regarding officer positions and dates.
- 10.6 Trustee education is a single question attestation: libraries must attest that all trustees have completed their legally required annual education or explain why not in a note.
- Questions 14 – 15: Oath of Office – Trustees should take a new oath of office every time they begin a new term. The oath is required by Public Officers Law (Section 10) for all public (not association) library trustees. Association libraries may enter N/A. Oath of Office should be taken and filed within 30 days of the beginning of a trustee's term.
- Question 16: Brand New Trustee – If a trustee has ever served on a library board before this year, indicate N. If the trustee is a trustee who has never served on a library board in New York State, indicate Y.

Part 11: Operating Funds Receipts

- Report financial data based on the fiscal reporting year.
- ROUND TO THE NEAREST DOLLAR

Part 12: Operating Fund Disbursements

- Report financial data based on the fiscal reporting year
- Q12.20 Postage and Freight. This question has been deleted; please enter this information in Q12.23 Other Miscellaneous expenses.

Part 13 - Capital Fund Receipts

- Report financial data based on the fiscal year.
- Only complete Part 13 if the library has a capital fund that is *separate* from their operating fund.
- ROUND TO THE NEAREST DOLLAR.

Part 14 - Capital Fund Disbursements

- Report financial data based on the fiscal reporting year.
- Only complete Part 13 if the library has a capital fund that is *separate* from their operating fund.
- ROUND TO THE NEAREST DOLLAR.

Part 15 - Central Libraries

- FOR CENTRAL LIBRARIES ONLY

Part 16 - Federal Totals

- All questions in Part 16 are calculated, locked fields.
- See instructions for definitions and calculations of each of these Federal Totals.
- Answers in Part 16 must correlate to information provided in other parts of the report. Compare to the previous year to look for large variations. If found, refer to the corresponding Part and add Notes to explain the variation.