2023 NYS Annual Report Follow-up

Agenda

- 2024 Annual Report changes
  - Did it make it easier to submit?
  - The most challenging questions?
- Lessons learned from this year's annual report
- Suggestions and improvements
  - How many libraries suggest improvements?
  - Do you?
  - Do they make any difference?
  - How can we make it easier next year?
- Initial trends apparent from initial submissions

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2024 Annual Report Changes

The most challenging questions?
- Programming – What constitutes a program, especially One-to-One sessions
- Trustee Terms
- Trustee Oaths of office
- Repair and building expenses
- Miscellaneous expenses

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State Changes Made These Easier

Part 3
- Synchronous >> Live seemed to help A LOT
- Minimal need for changes after review

Part 10
- Single Trustee Education Attestation
    - Board President is responsible for maintaining records and "enforcing" completion

State Changes and Suggestions
- Notes never hurt
- Communicate about timelines and needed exceptions

WLS Changes

WLS Supplied **Physical Circulation Statistics**
- WLS Supplied Circ is usually higher OVERALL than what's calculated from Monthly stats.
- We are reviewing statistics reporting to provide consistent real statistics to eliminate non-specific factors, such as
  - Express – is it one of various formats?
  - New Book – is it fiction, nonfiction?
  - Foreign Language – is it a book, a movie, an audio?

Lessons Learned - General

Compare different parts of your report to see if they make sense. For example, does the Part 6 staff info align with the Part 12 expenses?

- Not ready to enter online?
  - Print a blank
  - Print last year's report – it will have notes
- If locked data isn't correct, email me with the correct data and I can have the state update it.
- Edit checks - don't panic!
  - Can be triggered by marginal amounts
  - If the numbers are accurate, just add a note "Accurate as reported"
- Enter data, compare to prior year, and add notes if there are significant differences (even if you don't get an edit check)
- Submit when you're ready: the process is Open the report, Enter data, Submit, WLS Review, Library updates, WLS Approval

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Lessons Learned - 3.31 and 3.32

[Count] Both in–person on–site and in–person off–site program sessions. For example, include a story time at a farmer's market or a presentation to a school group about library resources conducted at a school...

[Do not count] "Program sessions sponsored by other groups that use library facilities. For example, do not include a homeschooling group hosting a speaker in a meeting room without facilitation from library staff." Do staff facilitate during scheduled sessions like Family Services of Westchester?

[Do not count] Offsite outreach efforts that do not otherwise meet the definition of a program session, "a structured presentation offered by librarian to a group at a set time. For example, do not include having a library card signup booth at a farmer's market."

"if one walk–in time is scheduled and library staff meet with 5 individuals separately it may be counted as 5 sessions with a total of 5 attendees... If one walk– in time is scheduled but individual brings along an additional person, count as 1 session with 2 attendees."

Lessons Learned – Part 4 & Part 6

- Virtual Reference includes answering questions that the library receives and answers by email.

- Report on **budgeted** positions and compare to prior year for both Part 6 Staff and Part 12 Staff expenses.
  - Check the IT Wiki for calculating FTEs steps and example

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Staffing – Calculating FTEs

Example:

- Library A considers 35 hours FT
- It has 7 certified librarians on staff
  - 2 work 35 hours per week
  - 2 work 18 hours per week
  - 2 work 12 hours per week
  - 1 works 6 hours per week
- 35 + 35 + 18 + 18 + 12 + 12 + 6 = 136 hours
- 136 / 35 = 3.89 FTEs

Lessons Learned - Part 10

- Supply one record for each trustee position reported in 10.3 or 10.4, whether filled or vacant.
- Terms and oaths of office dates - Oaths of office must be taken and filed within 30 days of
    - the beginning of the trustee's term
    - The trustee's appointment
    - if the OoO dates correspond to the appointment date that rather than the beginning of the term, add a note – "appointment MM/DD/YYYY.
- Always add records for trustees or vacancies after the last record or the software may remove existing records.

Part 10 Trustee Education

Topics may include
- financial oversight
- accountability
- fiduciary responsibilities
- the general powers and duties of a library trustee

The Board President is responsible for maintaining trustee education records and policies.

Trustee Education Requirements
- Sample Trustee Education Policy
- Self-Assurance Form (PDF)
- Trustee Education Activities Record (Excel)
- Library Trustee Webinars

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Empowering libraries. Empowering communities.

Lessons Learned – Part 12

- 12.23 Include postage in 12.23 Other Miscellaneous

- 12. 40 It is absolutely acceptable, if not preferred, for the Board to approve prior to WLS approval so that the state sees that Board members are aware of and completing their fiduciary responsibility. If a future date is listed, add the note "Anticipated Date of Approval."

Suggestions and improvements

Your suggestions and feedback matter. Few libraries provide this for the state.
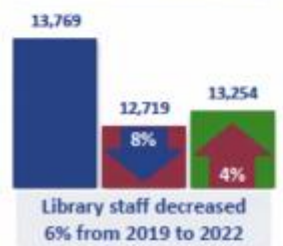
- Do you provide any?
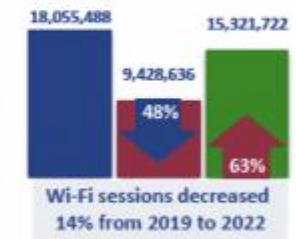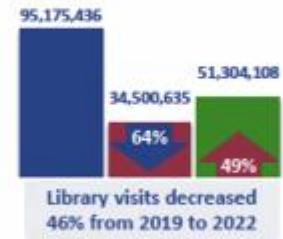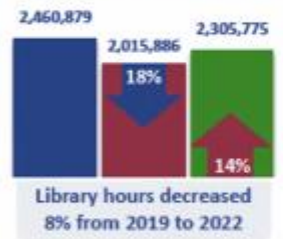- How can we make it easier next year?

My feedback will include:
- Part 1 first screen NEXT buttons don't advance
- In Firefox, reports for printing display as pdfs but save only as text files; please update.
- Fix the Part 1 first page Next link so that it goes to the next page
- Attach the left navigation to the page body scroll so it floats and you don't have to scroll up and down to get to page and navigation elements
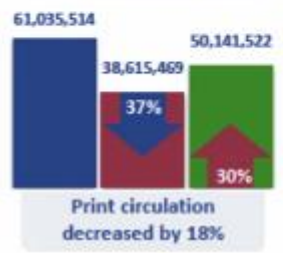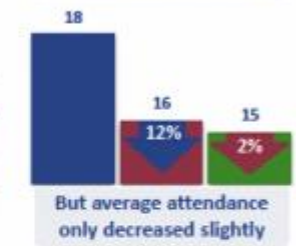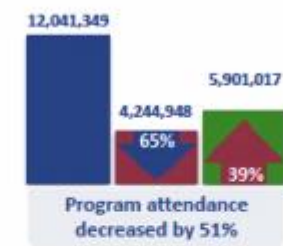- Part 7 - Tool tip link goes to 404 - This help topic applies to Questions 1 through 14... <Helpful information for meeting minimum public library standards>

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New York State Library — 2022 Summary: Public Library Annual Reports

Legend: 2019, 2021, 2022

- Library hours decreased 8% from 2019 to 2022
  - 2,460,879 / 2,015,886 (18%) / 2,305,775 (14%)
- Library visits decreased 46% from 2019 to 2022
  - 95,175,436 / 34,500,635 (64%) / 51,304,108 (49%)
- Wi-Fi sessions decreased 14% from 2019 to 2022
  - 18,055,488 / 9,428,636 (48%) / 15,321,722 (63%)
- Library staff decreased 6% from 2019 to 2022
  - 13,769 / 12,719 (8%) / 13,254 (4%)

*Due to changes in how some statistics were gathered and reported, data for 2021 programs and Wi-Fi sessions may have inconsistencies
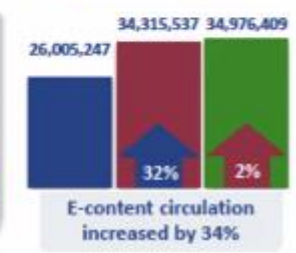
- Reference decreased 57% from 2019 to 2022
  - 26,173,272 / 8,569,370 (67%) / 11,215,316 (31%)
- Number of programs decreased 44%
  - 679,224 / 272,913 (60%) / 387,444 (42%)
- Program attendance decreased by 51%
  - 12,041,349 / 4,244,948 (65%) / 5,901,017 (39%)
- But average attendance only decreased slightly
  - 18 / 16 (12%) / 15 (2%)
- Print circulation decreased by 18%
  - 61,035,514 / 38,615,469 (37%) / 50,141,522 (30%)
- E-content circulation increased by 34%
  - 26,005,247 / 34,315,537 (32%) / 34,976,409 (2%)

Arrows show changes from previous year (Down from 2019 / Up from 2021)
Bar colors signify data year (2019, 2021, 2022)

New York State Library — Public Library Literacy Programs (2022 Annual Reports)

Early Literacy

PROGRAM FOCUS
- Child focused 63%
- Children and Caregivers 34%
- Caregiver focused 3%
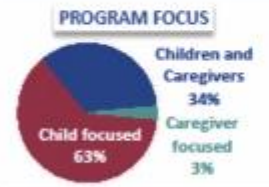
612 public libraries provided 87,394 programs for 1,574,223 patrons

PARTNERS
- Health Care Providers 10%
- Unspecified 11%
- Non-public Schools 14%
- Childcare Centers 28%
- Public Schools/BOCES 37%

Adult Literacy

PROGRAM TYPE
- One-on-one programs 60%
- Group programs 40%
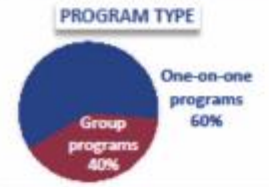
227 public libraries provided 32,062 programs for 113,074 patrons

PARTNERS
- Non-public Schools 9%
- Unspecified 25%
- Public Schools/BOCES 31%
- Literacy NY 35%

English for Speakers of Other Languages (ESOL)

PROGRAM TYPE
- Adult Groups 75%
- One-on-one 20%
- Youth Groups 5%
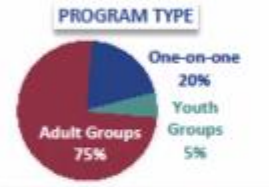
172 public libraries provided 33,191 programs for 258,350 patrons

PARTNERS
- Non-public Schools 9%
- Unspecified 24%
- Literacy NY 32%
- Public Schools/BOCES 35%

Digital Literacy

PROGRAM TYPE
- One-on-one 83%
- Group Sessions 17%
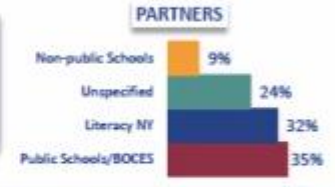
476 public libraries provided 97,819 programs for 195,390 patrons

WI-FI
- Increased Outdoor Availability 250 libraries
- Provided Outdoor Access 498 libraries

Initial 2022 – 2023 Trends

- Fewer 0-6 programs with higher attendance
- More teen programs (target age 12-18) but fewer attendees than in 2022 with a few exceptions that had significant growth
- Fewer adult programs with higher attendance
- Fewer general interest, but higher participation
- Public computer use down
- Wireless use up

Part 3 Capturing Program Statistics

- Use your library calendar. For each program, add a field for
  - AGE breakdown choices (3.17a – 3.21b)
  - VENUE breakdown choices (3.24a – 3.26b)
  - Attendance
  - Topic Category (ESOL, Adult Literacy, Digital Literacy, etc)
- Contact Allison about a form that staff can use to record program information. Results can be used to create pivot tables with Annual Report question reporting statistics (see next slide)

Target Audience By Age Group *
- Age 19 or older (3.17)
- Young Adults Ages 12–18 (3.18)
- Children Ages 0-5 (3.19a)
- Children Ages 6-11 (3.19b)
- General Interest (all ages) (3.20)
- None

Program Format
(One-to-one sessions include only scheduled sessions; report unscheduled sessions as reference in Part 4)
- Group
- One-to-one (3.22)

Program Location/Type. Required for all Group Programs
(hybrid programs that are in-person AND virtual are counted as In-Person programs)
- In-Person On-site (3.21a)
- In-Person Offsite (3.21b)
- Virtual (3.21c)
- Asynchronous (3.29a)

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Part 3 Program Stats Form Results

Program Counts

Raw Results

Name of Program	Date	Target Audience By Age (	Program Format (One-to-one sessions incl	Program Location/Type. P (hybrid programs that are	Programs for English S speakers of other lang Digital Literacy The A
6 Tuesday Toddler Storytime	1/2/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a)	
1 iPhone - Libby	2/3/2023	Age 19 or older (3.17)	One-to-one (scheduled se	In-Person On-site (3.21a)	DIGITAL LITERACY
6 Spanish Conversation	7/5/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	ENGLISH SPEAKE
2 Ed Ruscha Talk	9/27/2023	Age 19 or older (3.17)	Group	Virtual (hybrid programs that are in-person AND	
2 Tuesday Toddler Storytime	6/7/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a)	EARLY LITERACY (
0 toddler Story Time	6/13/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a)	EARLY LITERACY (
2 basic computer skills	7/7/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	DIGITAL LITERACY
6 internet	7/14/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	DIGITAL LITERACY (3
2 flower arranging	7/31/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	
2 gaming for teens	7/7/2023	Young Adults Ages 12–18	Group		
6 Cookbook Club: Salads	9/19/2023	Age 19 or older (3.17)	Group		

COUNTA of Name of Progran	Program Format (One-to-one sessions include only scheduled sessions; report unsched		
Target Audience By Age Grou	Group	One-to-one (3.22 One-to-one (sch	Grand Total
Age 19 or older (3.17)	6	1	1	8
Children Ages 0-5 (3.19a)	4			4
Children Ages 6-11 (3.19b)	1			1
Young Adults Ages 12–18 (3.	1			1
Grand Total	12	1	1	14

Attendance

		Program Category (optional as needed) Early Literacy Programs are for children age birth through five years or parents and caregivers of children, age birth through five years; provide not necessarily attend the same sessions. Adult Literacy Programs include tutor and student training in use of the library and its resources such as computers, library materials, job info GED test preparation, citizenship preparation) and all other types of literacy assistance for adults. Programs for English Speakers of Other Languages (ESOL) are any programs that help								
SUM of Attendance (or Views of an Asynchronous Prog	Program Locatio (hybrid programs	speakers of other languages to learn English. Digital Literacy The ALA defines digital literacy as the ability to use information and communication techniques to find, evaluate, create and co								
	In-Person On-site (3.21a)					In-Person On-sit	Virtual (hybric	Virtual (hybrid pr	Grand Total
Target Audience By Age Group	DIGITAL LITERA	DIGITAL LITERA	EARLY LITERAC	ENGLISH SPEAKERS OF OTHER LANGUAGES (ESOL)					
Age 19 or older (3.17)	32	0	36		0	68	0	0	68
Children Ages 0-5 (3.19a)	6			61		67			67
Children Ages 6-11 (3.19b)	5					5			5
Young Adults Ages 12–18 (3.18)	14					14			14
Grand Total	57	0	36	61	0	154	0	0	154

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Q&A

For questions and help, contact
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914-231-3221

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Questions?

- [NYS Annual Report Statistics & Information](https://it.westchesterlibraries.org/statistics/nys-annual-report-statistics-template-information/)
  https://it.westchesterlibraries.org/statistics/nys-annual-report-statistics-template-information/
- Library Development: New York State Library

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