



2024 NYS Annual Report

Agenda

- WLS Statistics
- General improvements and changes
- Most significant changes
- Part by part notes
- Suggestions
- Q & A

Submission Dates

- **Tuesday, February 18 - due to WLS**
- **Feb 18-Feb 28 – revisions**
- **Saturday, March 1 – due to State**

WLS Statistics

WLS Supplied **Physical Circulation Statistics**

- WLS Supplied Circ is usually higher OVERALL than what's calculated from Monthly stat cats.
- 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?
- Electronic Circulations Statistics and will be available by Monday, January 13

General Information

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?

- The process: Open the report, Enter data, Submit (when you're ready), WLS Review, Library revisions, WLS Approval
- Not ready to enter online? Print a blank and/or Print last year's report with the previous year's data and 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)
- Only use N/A in Section 1

% Complete = starts at 10% because of pre-filled Q's

General Improvements and Changes

- Report now saves automatically
- Multiple users can now view and edit reports at the same time
- All questions, including those in repeating groups, can now display last year's entry as well as the 5 years preceding
- All sections include "as of" reporting dates – Fiscal Year, Calendar Year, or other
- 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.

Significant report change: Part 5

Part 5: Electronic Use

- Added/reordered by IMLS
- Voluntary this year and required for 2025 Annual Report
- Subsections Electronic Holdings and Databases / Online Learning / E-Material Circulation Restructured Questions
- E-Rate questions have been moved from Section 5 to Section 4 as Questions 4.18 to 4.20

Part 3: Policies, Programs, Services

- Summer Reading, Early Literacy, Adult Literacy, ESOL, and Digital Literacy programs are subsets of Live and Prerecorded programs and should be entered in those sections as well as in the appropriate subsequent section
- New questions 3.34b to 3.34e - library use of social media
- Instructions for 3.59 - Combined Audience Programs are programs aimed at both children aged birth through five years and parents or caregivers of children aged birth through five years.

Part 3: Inclusions and Exclusions

[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."

Part 3: 3.31 and 3.32 – One-on-One

- "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."
- Take and Make kits that are not part of a synchronous program such as a story hour
 - Q3.31, One-on-One Program Sessions - Count each kit prepared
 - Q3.32 One-on-One Program Attendance. Count each kit picked up

Part 4

- New question, 4.13 - automatic renewals
- Q4.14 Reference Transactions
 - Count scheduled and unscheduled sessions
 - Do not count formal instruction (count it in Part 3 as a program)
 - Do not count simple directional/informational information - assistance with locations, schedules, equipment, supplies, or policy statements
- Virtual Reference includes answering questions that the library receives and answers by email

Part 5: Electronic Use

Part 5: Electronic Use – Added/reordered by IMLS

- Questions 5.1 to 5.18 take the place of previous Part 2 Electronic Collections questions
- Respond Yes, No, or Missing if unknown
- Questions 5.19 to 5.22 take the place of previous Part 4 Electronic Use (items with loan periods)
- “Retrieval” (items without loan periods) numerical statistics aren’t reported. If you collect these, they may still be beneficial for local purposes
- Voluntary this year and required for 2025 Annual Report

Part 6: Staff

- Report on **budgeted** positions and compare to prior year for both Part 6 Staff and Part 12 Staff expenses.
- All staff questions refer to paid staff
- Review Part 6 Staff, Part 12 Staff Expenses, and Part 16 to be sure they make sense.

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

Part 10: Officers and Trustees

- Report Officers and Trustees as of February 1 of the CURRENT year (2025)
- 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 or 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](#)

Part 12: Operating Fund Disbursements

- 12.8 have been updated to add circulating portable electronic devices, and materials in new formats.
- 12.23 Include postage in 12.23 Other Miscellaneous
- 12.40 It is 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?

Questions?

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

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Empowering libraries. Empowering communities.

Q&A

For questions and help, contact

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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)

Part 3 Program Stats Form Results

Program Counts

Name of Program	Date	Target Audience By Age Group	Program Format	Program Location/Type	Program Category	Program Format	One-to-one (scheduled sessions)	One-to-one (unscheduled sessions)	Grand Total
Tuesday Toddler Storytime	1/2/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a)	EARLY LITERACY (3.18)				
iPhone - Libby	2/3/2023	Age 19 or older (3.17)	One-to-one (scheduled sessions)	In-Person On-site (3.21a)	DIGITAL LITERACY (3.19)				
Spanish Conversation	7/5/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	ENGLISH SPEAKERS OF OTHER LANGUAGES (ESOL) (3.20)		6	1	8
Ed Ruscha Talk	9/27/2023	Age 19 or older (3.17)	Group	Virtual (hybrid programs that are in-person AND virtual)	ENGLISH SPEAKERS OF OTHER LANGUAGES (ESOL) (3.20)		4		4
Tuesday Toddler Storytime	6/7/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a)	EARLY LITERACY (3.18)		1		1
toddler Story Time	6/13/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a)	EARLY LITERACY (3.18)		1		1
basic computer skills	7/7/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	DIGITAL LITERACY (3.19)				
internet	7/14/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	DIGITAL LITERACY (3.19)				
flower arranging	7/31/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	ADULT LITERACY (3.17)				
gaming for teens	7/7/2023	Young Adults Ages 12-18 (3.18)	Group	In-Person On-site (3.21a)	ADULT LITERACY (3.17)				
Cookbook Club: Salads	9/19/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a)	ADULT LITERACY (3.17)				
Grand Total							12	1	14

Raw Results

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 information, 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 speakers of other languages to learn English.

SUM of Attendance (or Views of an Asynchronous Program)	In-Person On-site (3.21a)	Virtual (hybrid programs that are in-person AND virtual)	Virtual (hybrid programs that are in-person AND virtual)	Virtual (hybrid programs that are in-person AND virtual)	Virtual (hybrid programs that are in-person AND virtual)	Virtual (hybrid programs that are in-person AND virtual)	Grand Total	
Target Audience By Age Group	DIGITAL LITERACY (3.19) EARLY LITERACY (3.18) ENGLISH SPEAKERS OF OTHER LANGUAGES (ESOL) (3.20) ADULT LITERACY (3.17)							
Age 19 or older (3.17)	32	0	36	0	68	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	154	0	154	

Attendance



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