

Empowering libraries. Empowering communities.

2024 NYS Annual Report Follow-up

Agenda

- 2024 Annual Report changes
 - Did it make it easier to submit?
 - Completion improvements
 - Suggestions from libraries?
- Thoughts and Suggestions for 2025 completion
- Trends apparent from initial submissions



Changes

Did these changes make it easier to submit? How?

IMLS/State

General

- Auto-save
- Multiple user access
- Pre-filled responses
- Availability of historical data (though inconsistent)

Parts 2 and 5

Removal of electronic collection counts

WLS

Supplied Physical Circulation Statistics

- WLS Supplied Circ is usually higher OVERALL than what's calculated from Monthly stats
- More libraries used them
 Supplied Electronic Circ Stats
- Format Breakdown
- Add stats for platforms you purchase at your library (all OverDrive is included in WLS supplied)



Improved Responses from 2023

- Programming What constitutes a program, especially One-to-One sessions
- Trustee Oaths of office dates

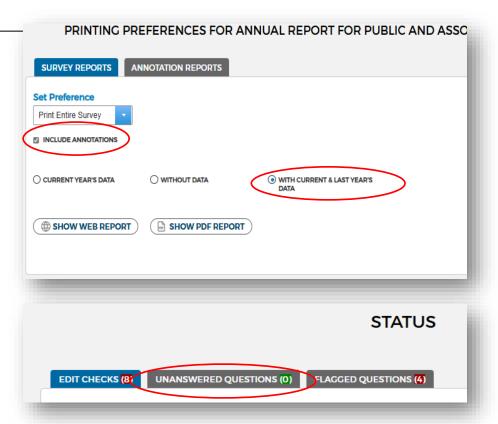
The most challenging questions?

- One-to-one session counts
- Trustee Terms
- Repair and building expenses
- Miscellaneous expenses



Lessons Learned - General

- Not ready to enter online?
 - Print this year's report with annotations and last year's data to fill in by hand
- If locked data isn't correct, email me with the correct data and I can have the state update it.
- Use the Status option to make sure you've filled in all questions. Do not leave blanks.

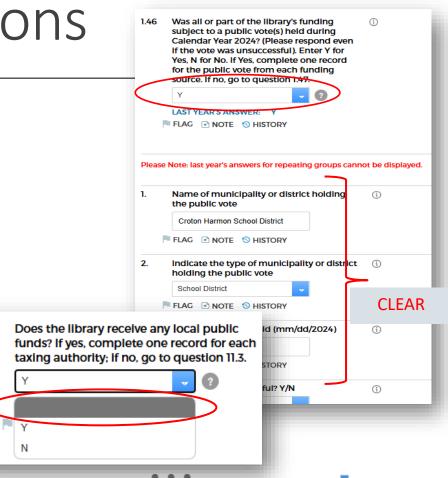




Lessons Learned – Questions With Subquestions

For questions with subquestions,

- To clear subquestion responses: delete text fields and choose blank options from dropdown menus; manually save
- If you enter Y for Yes in the question, make sure subquestions display. Examples: public votes (1.46), summer reading (3.35), local public funds (11.1) If they don't display, choose the blank in the question and save manually. Choose Y and the subquestions will display.



Lessons Learned - Notes

Adding notes: If response is

- the same as the previous year, add "Accurate as reported"
- significantly higher or lower than the previous year, even if you don't get an edit check, add a note to explain why (this also helps you with analysis)
- Part 12.21 23. If any expense exceeds \$10,000 or 5% of the library's budget, whichever is higher, indicate in a Note how the funds were spent.



Overall Spot Checks

Compare different parts of your report to see if they make sense

- Do collection counts and additions (Part 2) align with expenses (Parts 12 and 16)?
- Do staff counts (Part 6) align with personnel expenses (Part 12)?
- How do physical (print and other) circulation and digital use correspond with expenditures?

These are also opportunities to do initial analysis!



- 1.20 & 9.7 –the general phone number of the library
- 1.22 & 9.9 the general email that one would use to contact the library
- Interim directors are not reported



3.26 a & b. Live Virtual Programs. Each program session should only be counted once and in one format category. Include virtual program sessions

- that are also recorded
- at the administrative entity level; do not duplicate numbers at each branch.
- under Live Onsite or Live Offsite Programs if they are part of hybrid programs

3.31 and 3.32 One-on-one. Report 2 or more attendees for a one-to-one program, but **this should be a rare**. Suggestion: For things like notary, passport, etc. counts, count the number of documents processed in both sessions and attendance instead of counting people.

Include topical subsections in age and venue category totals

Scavenger hunts at the library, Story Walks are "self-directed activities" and **are not** reported in the Annual Report.



- Only report a local resource in one category, for instance, Research or Online Resource.
- If you report that the library purchases materials other than OverDrive
 Advantage Plus, the corresponding format(s) counts in that category should
 be higher than the WLS supplied number.
 For example, your library pays for CloudLibrary.
 - 5.1 Did the library provide access to e-books purchased solely by the library? **Report Yes**
 - 5.19 The total circulation of e-books during the reporting period. Report Total of WLS-Supplied + CloudLibrary stats



- Count the number of voting positions in 10.3 or 10.4. Supply one record for each trustee position reported whether filled or vacant.
- Report as of Feb 1 of current year. Add records for trustees or vacancies
 after the last record or the software may remove existing records.
- Terms
 - Should usually be consistent with your fiscal year
 - For trustees who are serving partial terms, #13 response is No.
 You MUST add a note with
 - The name and term dates of the trustee who vacated or
 - A statement that the seat was vacant



• 11.9. Other State Monies. If the library does not have a separate capital funds account, report here any monies received in fiscal year ending 2024 through Public Library Construction Grants



- 12. 40 Assurance. If a future date is listed for Board Approval, add the note "Anticipated Date of Approval."
- The Board approves the Annual Report as part of their fiduciary responsibility.



- 14.1 Construction Record payments to contractors for construction costs pursuant to contract including change orders. Include general construction, heating and ventilating, plumbing, electrical, etc.
- 14.2 Incidental Construction Record expenditures for the following:
 - Architects' Commissions and Expenses payments of architects' commissions and other expenses of the architect. Record clerk of the work's expenses when employed and paid by the architect.
 - Site Acquisition costs of site acquisition including options, demolition of existing structures and other expense of preparation of the site for construction.
 - Furniture and Equipment capital project expenditures for furniture and other equipment.
 - Other Incidental Costs advertising costs, bond and note issue expense (printing, travel, etc.)
 watchmen, clerk of the works (unless paid by the architect),

legal services, surveying, site improvement, utility system, etc.

Suggestions and improvements

More libraries added suggestions.

- Report electronic museum passes
- Simplify program counts
- Make program counts more granular
- Yours?

Thank you!

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>



Initial 2023-2024 Trends

- Were changes in program size intentional?
 - Some libraries had fewer programs with higher attendance than in previous year.
 - Some libraries had more programs with lower attendance than in previous year.
- More teen programs (target age 12-18) but fewer attendees than in
 2022 with a few exceptions that had significant growth
- Many libraries are still offering virtual programs
- Public computer use down
- Wireless use up
- Collection expenses have shifted toward digital purchasing



Q&A

For questions and help, contact
Allison Midgley
amidgley@wlsmail.org
914-231-3221



Questions?

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

Allison Midgley

- Training@wlsmail.org
- Support@wlsmail.org

