



# 2024 NYS Annual Report Follow-up

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# Agenda

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- 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

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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

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- 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.

PRINTING PREFERENCES FOR ANNUAL REPORT FOR PUBLIC AND ASSO

**SURVEY REPORTS** **ANNOTATION REPORTS**

**Set Preference**

Print Entire Survey

☒ INCLUDE ANNOTATIONS

☐ CURRENT YEAR'S DATA ☐ WITHOUT DATA ☒ WITH CURRENT & LAST YEAR'S DATA

**STATUS**

# 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.

1.46 Was all or part of the library's funding subject to a public vote(s) held during Calendar Year 2024? (Please respond even if the vote was unsuccessful). Enter Y for Yes, N for No. If Yes, complete one record for the public vote from each funding source. If no, go to question 1.47.

Y

LAST YEAR'S ANSWER: Y

FLAG NOTE HISTORY

Please Note: last year's answers for repeating groups cannot be displayed.

1. Name of municipality or district holding the public vote

Croton Harmon School District

FLAG NOTE HISTORY

2. Indicate the type of municipality or district holding the public vote

School District

FLAG NOTE HISTORY

11.1 Does the library receive any local public funds? If yes, complete one record for each taxing authority; If no, go to question 11.3.

Y

Y

N

CLEAR

# Lessons Learned - Notes

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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

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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!**



# Lessons Learned – Part 1 & 9

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- 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

# Lessons Learned – Part 3

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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.

# Lessons Learned – Part 5

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- 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**



# Lessons Learned - Part 10

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- 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

# Lessons Learned – Part 11

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- 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

# Lessons Learned – Part 12

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- 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.

# Lessons Learned – Part 14

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- 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

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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

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- 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

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For questions and help,  
contact

Allison Midgley

[amidgley@wlsmail.org](mailto:amidgley@wlsmail.org)

914-231-3221

# Questions?

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- [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](#)

Allison Midgley

- [Training@wlsmail.org](mailto:Training@wlsmail.org)
- [Support@wlsmail.org](mailto:Support@wlsmail.org)