



2025 NYS Annual Report

Agenda

- 2025 Submission
- Supplied Data
- Data Entry
- Part-by-part Notes
- New 2025 Questions
- Q & A

NYS Annual Report Statistics & Information
Your go-to for data, updates, and Q&A

Submission Dates

- **Wednesday, March 4 - due to WLS**
- **Today – March 31 – revisions**
- **Wednesday, April 1 – due to State**

Don't hesitate to email Allison with your questions! amidgley@wlsmail.org

2025 Submission Process as of 1/13/2026

1. Enter data in Annual Report questionnaire
([***DRAFT-DLD-2025-AnnualReportSurveyQuestions***](#) Excel Workbook or [printed blank](#))
 1. Start with Parts 3, 6-14
 2. When statistics are provided, complete Parts 2, 4-5
 3. Wait to complete Part 1 (DLD may be able to enter this for libraries)
2. When you're done, email Allison to let her know you're ready for review
3. Allison will email you regarding blank questions, discrepancies, etc.
4. Work via email on revisions
5. Allison will let you know that all revisions are accepted and your report is approved for submission to the state.

General Guidelines

For questions that were pre-filled in previous years, use the 2024 Annual Report for response information

- The reporting period (fiscal year, calendar year, etc) are given at the beginning of each section. Use them for reporting.
- Enter data, compare to prior year(s), and add a note if there is a significant difference between years
- 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?
- Use N/A only in Part 1 and Part 10

Have a question about how to respond or a definition of statistic?

Refer to the [DLD Full Instructions for the 2024 Annual Report](#)

2025 Suggested Entry Order

Part 1 – GENERAL LIBRARY INFORMATION

Part 2 – LIBRARY COLLECTION (PHYSICAL)

Part 3 – LIBRARY PROGRAMS, POLICIES, AND SERVICES

Part 4 – LIBRARY TRANSACTIONS

PART 5 – ELECTRONIC USE

Part 6 – STAFF INFORMATION

Part 7 – MINIMUM PUBLIC LIBRARY STANDARDS

Part 8 – PUBLIC SERVICE INFORMATION

Part 9 – SERVICE OUTLET INFORMATION

Part 10 – OFFICERS AND BOARD MEMBERS

Parts 11-14 – FINANCIAL REPORT

SUGGESTED ENTRY ORDER

- 1. Parts 3, 6-14**
- 2. Parts 2, 4-5**
- 3. Part 1**



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WLS Supplied Data

Part 2: Holdings

Part 3 Q3.2-3.3: Borrowers

Part 3 Q3.35 – 3.55: Summer Reading Program (optional)

Part 4: Physical Circulation WLS Supplied Circ is usually higher
OVERALL than what's calculated from Monthly stat cats.

Part 5: Electronic Use Q5.19 – 5.22

Part 9 Q28-32: Internet Provider for libraries that use WLS as a
network and/or wireless provider

Part 11 Q11.3 LLSA (if needed)



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Part-by-part Hints: Part 1

Report all information in Part 1 as of December 31, 2025, except for questions related to the current library director/manager (questions 1.37 through 1.44)

- 1.20 Enter the library's **general** phone number
- 1.21 Enter the library's **general** fax number
- 1.22 Enter the library's **general** email address
- 1.36a-c Do not fill in
- 1.46 **OR** 1.47 For most libraries, respond to one **OR** the other

Part-by-part Hints: Part 2

Report as of the end of the fiscal year

- Use a copy of your spreadsheet in the WLS-provided workbook to tabulate WLS-supplied holdings from the ILS and library-supplied uncataloged holdings
- Digital material holdings are not individually counted
- **2.15 Other... Physical Items** includes physical museum passes

A Live (live) program session

Is planned and Uses library financial resources or staff time

Part-by-part Hints: Part 3

Report questions 3.1-3.3 and 3.17a-3.34e as of the last day of the fiscal year Report questions 3.4-3.16 and 3.35-through 3.77b based on the 2025 calendar year.

- All programs are counted in 2 ways: Audience, Venue
- 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 (meaning these are counted in 3 ways)
- 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" or a storywalk

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-by-part Hints: Part 4

Report all transactions as of the end of the fiscal year

- Count all physical materials in all formats that are charged out for use **outside** the library, including **physical** museum passes
- 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-by-part Hints: Part 5

Electronic Use Holdings

By Format and Electronic Holdings and Databases

- 5.1 to 5.18 For each format or collection, there are 3 questions, Did the library provide access to
 - Purchased solely by the library
 - Purchased via a consortium
 - Provided by the New York State library at minimal or no cost
- Respond Yes, No, or Missing if unknown



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Part-by-part Hints: Part 5

E-Material Circulation

Report all transactions as of the end of the fiscal year

- Questions 5.19 to 5.22 report circulation of materials that can be accessed online from an electronic device (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



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Part-by-part Hints: Part 6 Staff

Report figures as of the last day of the fiscal year

- 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.

Part 6: 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-by-part Hints: Part 7 - 9

Part 7: Report as of December 31, 2025

Part 8: Report as of Fiscal Year end.

Part 9: Report as of Fiscal Year end

- Enter any branch information alphabetically by branch name

Part 10: Officers and Trustees

Report Q10.1-10.7 as of December 31, 2025

Report Officers and Trustees as of February 1 of the CURRENT year (2026)

- 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 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.



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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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Part 11: Operating Funds Receipts

Report financial data based on the fiscal reporting year

- Round to the nearest dollar
- 11.1 responses should correspond to 1.46 responses
- 11.25 BALANCE IN OPERATING FUND is the same as the previous year's Q12.39 response if the fiscal year has not changed

Part 12: Operating Fund Disbursements

Report financial data based on the fiscal reporting year

- 12.8 Other Materials Expenditures include 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.”
- 12.45 If you answer “No,” leave Parts 13-14 **blank**

Parts 13 – 14, 15 - 17

Report financial data based on the fiscal reporting year

- If you answered yes to 12.45, complete these parts

Part 15 is for Central Libraries only.

Part 16 – 17 are Federal and State entries used for data checking.
They may be left blank for now.

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?

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Questions?

- [NYS Annual Report Statistics & Information](#)
- [Library Development: New York State Library](#)

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

New 2025 Questions: Meeting Rooms

Meeting Room questions (optional for 2025)

- Total number of meeting spaces available to the public
- Number of reservable meeting spaces available to the public
- Number of times members of the public reserved meeting spaces

New 2025: Board Approved Policies

Proposed regulation to paragraph (4) of subdivision (b) of section 90.2 of the Regulations of the Commissioner of Education adds policies that **libraries will be required to adopt on or before January 1, 2027**. Yes/No questions will be added for each policy.

Does the Library have a Board-approved policy -

- For the **selection of library materials and reconsideration** of such selection?
- explaining the **public usage of library space and meeting rooms**?
- **Codes of conduct**?
- explaining the **confidentiality of library records**?
- **personnel policies** ensuring consistent staff management and fair employment practices?
- **disaster preparedness** policy?
- **financial control policies** that fulfill the legal and fiduciary responsibilities of the governing body and promote fiscal oversight, accountability, and sustainable management?

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 (One-to-one sessions incl (hybrid programs that are	Program Format	Program Location/Type. F speakers of other lang	Programs for English speakers of other languages to learn English (hybrid programs Digital Literacy The ALA defines digital literacy as the ability to use information and communication techniques to find, evaluate, create and	Program Format
5 Tuesday Toddler Storytime	1/2/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a)	COUNTA of Name of Program (One-to-one sessions include only scheduled sessions; report unsched	
1 iPhone - Libby	2/3/2023	Age 19 or older (3.17)	One-to-one (scheduled sessions incl (hybrid programs that are	In-Person On-site (3.21a) DIGITAL LITERACY	Target Audience By Age Group	One-to-one (3.22 One-to-one (sch Grand Total
5 Spanish Conversation	7/5/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a) ENGLISH SPEAKER	Age 19 or older (3.17)	6 1 1 8
2 Ed Ruscha Talk	9/27/2023	Age 19 or older (3.17)	Group	Virtual (hybrid programs that are in-person AND	Children Ages 0-5 (3.19a)	4
2 Tuesday Toddler Storytime	6/7/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a) EARLY LITERACY (Children Ages 6-11 (3.19b)	1
1 toddler Story Time	6/13/2023	Children Ages 0-5 (3.19a)	Group	In-Person On-site (3.21a) EARLY LITERACY (Young Adults Ages 12-18 (3.	1
2 basic computer skills	7/7/2023	Age 19 or older (3.17)	Group	In-Person On-site (3.21a) DIGITAL LITERACY	Grand Total	12 1 1 14
5 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		Program Category (optional as needed)	
2 gaming for teens	7/7/2023	Young Adults Ages 12-18	Group		Early Literacy Programs are for children age birth through five years or parents and caregivers of children, age birth through five years; provide	
5 Cookbook Club: Salads	9/19/2023	Age 19 or older (3.17)	Group		not necessarily attend the same sessions.	
SUM of Attendance (or Views of an Asynchronous Program)					Adult Literacy Programs include tutor and student training in use of the library and its resources such as computers, library materials, job info	
Target Audience By Age Group					GED test preparation, citizenship preparation) and all other types of literacy assistance for adults.	
In-Person On-site (3.21a)					Programs for English Speakers of Other Languages (ESOL) are any programs that help	
In-Person On-site – Virtual (hybrid Virtual (hybrid Grand Total						
DIGITAL LITERACY/ DIGITAL LITERACY/ EARLY LITERACY/ ENGLISH SPEAKERS OF OTHER LANGUAGES (ESOL)						
Age 19 or older (3.17)				32 0 36 0 68 0 0 0 68		
Children Ages 0-5 (3.19a)					61 67	
Children Ages 6-11 (3.19b)						5
Young Adults Ages 12-18 (3.18)				14	14	14
Grand Total				57 0 36 61 0 154 0 0 0 154		

Raw Results

Attendance

