

PREPARING YOUR LIBRARY'S 2021 STATE ANNUAL REPORT

Friday, January 14, 2022
10:00 a.m.

Tracie Miller
Public Library Administration Consultant
South Central Library System

Rather be somewhere else?



Welcome – Today's Agenda



Timeline

Reminders

New for the 2021 Report

Getting Started

Resources to Assist

Electronic Form (LibPAS)

Overview – Annual Report Sections

Suggestions / Questions

Annual Report Timeline

- SCLS Instructions & ILS/LINKcat Instructions will be available soon
- Jan. 24 LibPas will be open for data entry
- Thursday, Feb. 17 – let me know that your annual report is ready to review – make corrections as necessary *(my review will be via e-mail so you have a visual record of my suggestions & comments)*
- Friday, Feb. 25 – Report should be locked & a signed copy emailed to me.

Reminders for 2021 Report

- SCLS will pre-populate many questions
- Pre-filled data fields are not locked and may be changed intentionally or accidentally. If you change them intentionally, please explain the change.
- Some pre-filled data you shouldn't change (*OverDrive or electronic collections use*)
- ILS/LINKcat Instructions will tell you how you can manually calculate the LINKcat statistics.
- Adding notes to the report
- Signed copies will again be submitted by email. Printed copies are not required.

New for
2021
Report



Program
Reporting



Broadband
Connection



Total Physical
Items in
Collection

Links to Information for New/Updated Reporting Requirements

- Covid-19 questions have been slightly altered.
- New programming questions added in 2020 are included again in 2021.

- **COVID-19 Questions and Programming**—Below is information on the questions added to the 2020 Wisconsin Public Library Annual Report related to COVID-19 and programming. The detailed instructions on these items, as well as worksheets, and a guide to what exactly was added are available on the [Public Library Annual Report Instructions and Forms page](#).
- **COVID-19 related questions**—The Institute of Museum and Library Services (IMLS) added 15 COVID-19 data elements to the Federal Public Libraries Survey in 2020. These questions will be asked again in 2021 and potentially beyond. The following links contain more information about how those data elements will be reflected on the 2020 Wisconsin Public Library Annual Report—[Video](#) & [Google slideshow w/speaker notes](#).
- **Live, virtual and pre-recorded programs**—To better capture the virtual environment of much public library programming during the COVID-19 pandemic, the Division for Libraries and Technology has added reporting to explicitly allow for live, virtual programming and viewers as well as pre-recorded programming and viewers—[Video](#) & [Google slideshow w/speaker notes](#).
 - [Programming and Activity Count tracker Excel workbook](#) (downloads Excel file) updated to reflect live, virtual and pre-recorded programs
 - [Programming and Activity Count tracker workbook Google Sheet](#) updated to reflect live, virtual and pre-recorded programs
 - [A Platform Metrics Guide for Live, Virtual Programming and Pre-recorded Views](#) provides guidance on which metric to use for each format from some of the more commonly used platforms (e.g., Facebook, YouTube, Zoom, etc.).

Getting Started

- Start early – log into your electronic report (LibPAS) even if you're not ready to enter data
- LibPAS access information is the same as last year
- Instructions for using LibPAS on DPI site
- Read everything: DPI Instructions, SCLS Instructions & ILS/LINKcat Instructions
- SCLS Annual Report blog & e-mail list

Public Library Annual Report

- **SCLS 2021 Annual Report Instructions** (being updated)
 - [SCLS PSTAT List](#)
- **2021 Annual Report Instructions for ILS/LINKcat Libraries** -- user name and password required for LINKcat libraries to access Bibliovation reports (updated 01/??/22)
- **2021 LibPAS Electronic Annual Report Form** (*requires your library's user name & password*)
 - [Instructions](#)
- **DPI/DLT 2021 Public Library Annual Report Information**
 - [DLT Annual Report Website](#)
 - [DLT Instructions](#)
 - [Data Entry Worksheet](#) (Microsoft Word)
 - What's New in 2021
 - **COVID-19 Questions and Programming**—Below is information on the questions added to the 2020 Wisconsin Public Library Annual Report related to COVID-19 and programming. The detailed instructions on these items, as well as worksheets, and a guide to what exactly was added are available on the [Public Library Annual Report Instructions and Forms page](#).
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Public Library Development

Emergency Preparedness -
Pandemics ▼

Blogs & Communications

Director Certification ▼

Data & Reporting

Wisconsin Public Library
Service Data

Public Library Annual
Report

Wisconsin Public Library
System Plans



Administration &
Governance ▼



Library Legislation -
Funding ▼

Public Library Annual Report Instructions and Forms

Annual Report Login

Wisconsin Public Library and System Annual Report Electronic Reporting Portal Library

Performance Assessment Solution (LibPAS)  is open to retrieve reports, infographics, and brochures. Information about completing the Wisconsin Public Library Annual Report was sent to all Wisconsin Public Library directors from WI@countingopinions.com .

- **Instructions for the Annual Report** . Includes current descriptions of annual report data elements. New items and resources are highlighted in the Annual Report instructions.
- **Annual Report Worksheet** . This worksheet can be used to compile information before entering annual report data into LibPAS. *Note: The worksheet is provided for convenience and does not replace submission of the online or PDF report.*

LibPAS Online Form

http://wi.countingopinions.com

Home Menu Help Logout
Reports Prompts Print

Data Input

Review

Review	Collection	Wisconsin Public Library Annual Report	Period	2016	Approved
I. GENERAL INFORMATION II. OUTLET INFORMATION III. LIBRARY COLLECTION IV. LIBRARY SERVICES V. LIBRARY GOVERNANCE VI. LIBRARY OPERATING REVENUE VII. LIBRARY OPERATING EXPENDITURES VIII. LIBRARY CAPITAL IX. TRUST FUNDS HELD BY THE LIBRARY X. STAFF (FTE) XI. LOANS TO NONRESIDENTS XII. TECHNOLOGY XIII. LITERACY OFFERINGS AND DROP-IN XIV. ASSURANCE OF COMPLIANCE (select STATEMENT CONCERNING SYSTEM EFFECTIVENESS)	Library	South Central Library System	Library Data		
I. GENERAL INFORMATION					
This section requests basic information on the library's public service outlets. Some entries are prepopulated with information. Please update and enter corrections only as necessary.					
<input type="checkbox"/>	1. Name of Library ✓				
<input type="checkbox"/>	2. Public Library System ✓				
<input type="checkbox"/>	Salutation				
<input type="checkbox"/>	3a. Head Librarian First Name				
<input type="checkbox"/>	3b. Head Librarian Last Name				
<input type="checkbox"/>	4a. Certification Grade				
<input type="checkbox"/>	4b. Certification Grade Type				
<input type="checkbox"/>	5. Certification Expiration Date				
<input type="checkbox"/>	6a. Street Address (edit only if moved) ✓				
<input type="checkbox"/>	6b. Mailing Address (or PO Box #)				
<input type="checkbox"/>	7. City/Village/Town ✓				
<input type="checkbox"/>	8a. ZIP Code				
<input type="checkbox"/>	8b. ZIP4 Code				
<input type="checkbox"/>	9. County ✓				
<input type="checkbox"/>	10. Library Phone No. ✓				
<input type="checkbox"/>	11. Fax No.				
<input type="checkbox"/>	12. Director's Library E-mail Address				
<input type="checkbox"/>	13. Library Website URL	http://			
<input type="checkbox"/>	14. Number of Branches (only if applicable) ✓	11			
<input type="checkbox"/>	15. No. of Bookmobiles Owned ✓	2			
<input type="checkbox"/>	16. No. of Other Public Service Outlets	65			
<input type="checkbox"/>	17. Does your library operate a Books-by-mail program?	<input type="radio"/> Yes <input type="radio"/> No			
<input type="checkbox"/>	18. Is your library formally established as a Joint Library under s.43.53 ✓	<input type="radio"/> Yes <input type="radio"/> No			
<input type="checkbox"/>	20. Square Footage of Public Library (this location only) ✓	822,919			
<input type="checkbox"/>	21. Did your library or a branch move to a new facility or expand an existing facility during the fiscal year?	<input type="radio"/> Yes <input type="radio"/> No			

Worksheet for the Wisconsin Public Library Annual Report Reporting Library Activities for 2020

This worksheet can be used to compile necessary information before entering annual report data into LibPAS. All data entry fields are listed. Subtotal and total fields that are automatically calculated by LibPAS are not listed. Where information is provided by selecting a response from a dropdown list or radio buttons, the choices are shown; e.g., Yes / No.

This worksheet does not replace the online annual report or the printed PDF report and cannot be accepted by the Department of Public Instruction (DPI).

For additional information, see the [Instructions and Forms for the Public Library Annual Report page](#).

I. GENERAL INFORMATION

1. Name of Library		
2. Public Library System		
Salutation		
3a. Head Librarian First Name		
3b. Head Librarian Last Name		
4a. Certification Grade		Grade 1 / Grade 2 / Grade 3 / N/A
4b. Certification Type		Regular / Temporary / Provisional / Vacant / Pending / Permanent
5. Certification Expiration Date		
6a. Street Address		
6b. Mailing Address (or PO Box number)		
7. City/Village/Town		
8a. ZIP Code		
8b. ZIP+4 Code		
9. County		
10. Library Phone No.		
11. Fax No.		
12. Director's Library E-mail Address		@

Ask Questions

Tracie Miller
608-246-5612
traciemiller@scls.info

E-mail list – Annual
Report (scls-annreport)

Annual Report Blog

Section I – General Information

- DPI has pre-filled this information based upon last year's report
- Double check information – make changes as necessary
- Fill out Questions #14, #15 & #16 – number of branches, bookmobiles & outlets – even if your answer is zero

Section II – Library Collection

- # of Other Materials (Question #7) needs to be completed by each library (items must be cataloged – generic LINKcat okay)
- # of Electronic Collections pre-populated for all SCLS libraries (except locally owned or leased)
- # of Subscriptions needs to be completed by each library

Section III – Library Services

- Libraries must complete total circulation and total interlibrary loans
- Reference, Library Visits & Computer uses need to be completed by each library
- Database usage reporting
- Electronic Resources usage
- Libraries must complete public wireless Internet use data (count and method)

Section III

Library Services Continued

- **Uses of Electronic Materials**
- **Uses of children's electronic materials will be pre-filled by DLT in 2021**
- **Programming needs to be completed by each library**

Section IV – Library Governance

- List Library Board members – as of date when you are completing Annual Report
- List any vacancies on Library Board
- Don't forget Question #2 – Number of Library Board Members at bottom of page

Section V – Operating Revenue

- Report only Operating Revenue – not funds for capital expenditures
- Section V, #3a State Funds (*SCLS Instructions include separate listings for Youth Literacy Grants, Continuing Education Grants, and TEACH Grants*)

Section V

Operating Revenue Continued

- Federal Funds *Report e-Rate refunds here.*
- Contract Income, Funds Carried Forward, Other Operating Income
- Current Year (2021) Municipal Appropriation *(do not include funds specifically for capital expenditures)*

Section VI

Operating Expenditures

- Report all salaries / wages together
- Report all employee benefits together
- Collection expenditures (be sure to include all expenditures for electronic resources)
- Contracts for Services (SCLS Instructions include 2021 payments for Delivery, ILS, Technology & Enterprise Wireless. MyPC and Bibliotheca costs are not considered contractual).

Section VII – Capital Revenue & Expenditures

- Any revenues or expenditures reported in this section should not be included elsewhere in the annual report.
- If funds are appropriated to accumulate for capital projects over time, report that revenue (not the total accumulated fund) in Capital Income by the source in the year that the revenue was generated.

Section VIII – Other Funds

- Funds under Library Board's control reported here (investments, donation accounts, etc.)
- No need to attach documentation to your Annual Report for this section
- Funds your library has with the SCLS Foundation (or other foundations if you retain ownership of the principal) are reported here

Section IX – Trust Funds

- Funds controlled by Library Board – “donated library funds or property” transferred to be invested
- Library trustee has been appointed as financial secretary
- Financial secretary bonded
- Details of fund activity need to be attached to the print copy of Annual Report – sent to DPI

Section X - Staff

- Report staffing at your library as of the last day of 2021
- Report any vacancies that existed
- Fewer than 15 employees – list all on Question #1a
- 15 or more employees – report on Question #1b
- Be sure the FTEs reported in questions 1a. & 1b. Match those reported in 2a. 2b. & 2c.

Section XI

Loans to Non-residents

- Very important section = \$\$\$\$ for your library in the form of reimbursements
- Pre-filled for LINKcat libraries (ILS / LINKcat Instructions will have details on doing your own calculations, including for Question #9 which isn't pre-filled)
- In question 9a.-j. please list all adjacent counties alphabetically, even those with 0 circulation.

Section XII

Technology

- **Wireless Internet Access**
- **Type of Internet Connection**
- **Internet Filtering**

Section XIII

Self-Directed Activities

- Self-Directed Activities
- Read DPI Instructions and/or SCLS information for more details on “Self-Directed Activities”

Section XIV – Compliance

- Ties directly to Wisc. Stats. – requirements for public library system membership
- A check or mark in each box indicates compliance with the requirement
- SCLS & DPI will ask you about any box left unmarked – signals a compliance problem
- Contact me with questions

Section XV - Certification

- Copies of Annual Report signed & dated by both Library Board President and Library Director
- Signifies that information in Annual Report is “true and accurate”
- Signifies that the Library Board has “reviewed & approved this report”

Statement – System Effectiveness

PI-2401

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STATEMENT CONCERNING PUBLIC LIBRARY SYSTEM EFFECTIVENESS

As required by Wis. Stat. s. 43.58(6)(c), the following statement that the library system either did or did not provide effective leadership and adequately meet the needs of the library must be completed and approved by the library board. The response should be made in the context of the public library system's statutory responsibilities and the funding which it has available to meet those responsibilities.

County

The _____ Board of Trustees hereby states that in 2020 the _____

Name of Public Library

Name of Public Library System / Service

- did** provide effective leadership and adequately meet the needs of the library.
- did not** provide effective leadership and **did not** adequately meet the needs of the library.

Indicate with an X one of the above two statements.

Explanation of library board's response. *Attach additional sheets if necessary.*

Note: With the approval of the library board of trustees, this statement may be submitted separately from the Annual Report form that is sent to the library system, as an e-mail attachment to LibraryReport@dpi.wi.gov.

CERTIFICATION

The preceding statement was approved by the Public Library Board of Trustees.

Division staff will compile the statements received for each library system and, as required by Wis. Stat. s. 43.05(14), conduct a review of a public library system if at least 30 percent of the libraries in participating municipalities that include at least 30 percent of the population of all participating municipalities report that the public library system did not adequately meet the needs of the library. This statement may be provided to the public library system.

President, Library Board of Trustees Signature or designee	Name of President or Designee <i>Print or type</i>	Date Signed
>		

Statement – System Effectiveness

- Form can be submitted in tandem with the annual report or sent separately to DPI
- *Note: As a public document, the separate paper statement will be provided upon request to South Central Library System or others.*
- Forms due to DLT by the same date as the annual report—Monday, March 1, 2021

Annual
Report
Office
Hours

Feb. 9 or 10 @ 10 a.m.
via Zoom

Time to discuss
questions you have.

Register at:

<https://scls.evanced.info/signup>

Questions
&
Comments

SCLS Annual Report listserv
(*SCLS-annreport*) = for asking
questions & sharing ideas

SCLS Annual Report Blog =
vehicle for me to share
updates

This webinar will be archived

Feeling...

THE LOOK I GIVE



**WHEN I'M COMPLETELY
OVERWHELMED**