

Preparing Your Library's 2023 State Annual Report

Friday, January 12, 2023

10:00 a.m.

Tracie Miller

Public Library Administration Consultant

South Central Library System

Annual Report Time, Again?



Welcome - Today's Webinar Agenda

Timeline

Reminders

Updates for the 2023 Report

Quick overview of changes for 2024

Getting Started

Resources to Assist

Electronic Form (LibPAS)

Overview – Annual Report Sections

Questions

Annual Report Timeline

- DPI Instructions, AR Worksheet, SCLS Instructions & ILS/LINKcat Instructions are available
- **Wednesday, January 24** LibPas will be open for data entry
- **Friday, February 16** – Last date to 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 record of my suggestions & comments*)
- **Monday, February 26** – Signed copy emailed to me.

Reminders for 2023 Report

- SCLS will pre-populate many data fields.
- Pre-filled data field 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.
- Signed copies are submitted by email. Printed copies are not required.

Updates for 2023 Report



Clarification of
Employee
Benefits



Staff -
Standard
Classifications

Updates for 2023 Report



No Covid
Questions



Overdue Fine
Policy

Updates for 2023 Report by SCLS for LinkCat Libraries



Pre-fill Other
Materials Owned
(Section II, 7a)



Pre-fill Total
Circulation (Section
III, 1a)



Pre-fill Circulation
of Other Physical
Items (Section III,
1c)

Updates for 2023 Report by SCLS for LinkCat Libraries



Pre-fill Circulation to
Nonresidents Living in
an Adjacent County
(Section XI, 9)

Changes for 2024 Annual Report

- Website Visit Counts – No longer required
- (New Question) Auto-renewal of Physical Materials – yes/no question
 - Under present interpretation of WI State Statute, libraries CANNOT count auto-renewal, therefore this will be pre-filled as “no”.
- Complete overhaul of how we report e-content and databases.
- Programming Reporting Change

Links to Information for Reporting Requirements

- **DPI's Program and Activity Count Tracker Workbook**
- **DPI's Platform Metrics Guide for Live, Virtual Programming and Pre-recorded Views**
- **Link's are found on the SCLS Annual Reports Page.**

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 2022 Annual Report Instructions](#)
 - [SCLS PSTAT List](#)
- [2022 Annual Report Instructions for ILS/LINKcat Libraries](#) – user name and password required for LINKcat libraries to access Bibliovation reports (updated 01/13/22)
- [2022 LibPAS Electronic Annual Report Form](#) *(requires your library's user name & password)*
 - [Instructions](#)
- [DPI/DLT 2022 Public Library Annual Report Information](#)
 - [DLT Annual Report Website](#)
 - [DLT Instructions](#)
 - [Data Entry Worksheet \(Microsoft Word\)](#)
 - [What's New in 2022](#)
 - [Live, virtual and pre-recorded programs](#)—To better capture the virtual environment of public library programming, 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.).
- [Wisconsin Public Library System map](#) (from DPI)



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

<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Review</div> <ul style="list-style-type: none"> 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. OTHER FUNDS HELD BY THE LIBRARY X. TRUST FUNDS XI. STAFF (FTE) XII. LOANS TO NONRESIDENTS XIII. TECHNOLOGY XIV. LITERACY OFFERINGS AND DROP-IN XV. ASSURANCE OF COMPLIANCE (select STATEMENT CONCERNING SYSTEM EFFECTS) <div style="text-align: center; margin-top: 5px;"> ◀ Hide </div>	Collection Wisconsin Public Library Annual Report Period 2016 Library South Central Library System Location Library Data	Approved
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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="text"/>
<input type="checkbox"/> 2. Public Library System ✓	<input type="text"/>
<input type="checkbox"/> Salutation	<input type="text"/>
<input type="checkbox"/> 3a. Head Librarian First Name	<input type="text"/>
<input type="checkbox"/> 3b. Head Librarian Last Name	<input type="text"/>
<input type="checkbox"/> 4a. Certification Grade	<input type="text"/>
<input type="checkbox"/> 4b. Certification Grade Type	<input type="text"/>
<input type="checkbox"/> 5. Certification Expiration Date	<input type="text"/>
<input type="checkbox"/> 6a. Street Address (edit only if moved) ✓	<input type="text"/>
<input type="checkbox"/> 6b. Mailing Address (or PO Box #)	<input type="text"/>
<input type="checkbox"/> 7. City/Village/Town ✓	<input type="text"/>
<input type="checkbox"/> 8a. ZIP Code	<input type="text"/>
<input type="checkbox"/> 8b. ZIP4 Code	<input type="text"/>
<input type="checkbox"/> 9. County ✓	<input type="text"/>
<input type="checkbox"/> 10. Library Phone No. ✓	<input type="text"/>
<input type="checkbox"/> 11. Fax No.	<input type="text"/>
<input type="checkbox"/> 12. Director's Library E-mail Address	<input type="text"/>
<input type="checkbox"/> 13. Library Website URL	<input type="text" value="http://"/>
<input type="checkbox"/> 14. Number of Branches (only if applicable) ✓	<input type="text" value="11"/>
<input type="checkbox"/> 15. No. of Bookmobiles Owned ✓	<input type="text" value="2"/>
<input type="checkbox"/> 16. No. of Other Public Service Outlets	<input type="text" value="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) ✓	<input type="text" value="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 2023 (08/31/2023)

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		
3a. Salutation		
3b. Head Librarian First Name		
3c. 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 Number		
11. Fax Number		
12. Director's Library E-mail Address		@
13. Library Website URL		http://
14. Number of Branches		
15. Number of Bookmobiles Owned		
16. Number of Other Public Service Outlets		
17. Does your library operate a Books-by-mail program?		Yes / No
18. Is your library formally established as a Joint Library under Wis. Stat.43.53?		Yes / No
20. Square Footage of Public Library (this location only)		
21a. Did your library or a branch move to a new facility during the fiscal year?		Yes / No
21b. Did your library or a branch renovate or expand an existing facility during the fiscal year?		Yes / No
22. UEI Number		

Ask
Questions
/Find
Answers

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

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

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
- If your library maintains the same operating hours year round, report number of hours under the Winter Hours only. Do not breakdown these hours between Summer and Winter

Section II - Library Collection

- # of Other Materials Owned (Question #7a & b)
 - The number of items (7a) will be pre-filled.
 - Descriptions of the items (7b) available for circulation will need to be fill out by the library.
- # of Electronic Collections (Question #8a) Add the number of locally owned or leased electronic collections.
- OverDrive Magazines will now be reported in #8b. This will be pre-populated and should not be changed.
- # of Subscriptions needs to be completed by each library

Section III - Library Services

- SCLS will pre-fill Total Circulation, Circulation of Children's Materials and Other Physical Items.
- Libraries must complete total interlibrary loans.
- Registered Residents and Nonresident Users will be pre-filled for LINKCat libraries.
- Reference, Library Visits & Computer uses need to be completed by each library
- Public Wireless Internet use data (count and method) from the Meraki Enterprise Wireless System will be pre-filled for those libraries using the System.
- Database usage reporting
- Electronic Resources usage

Section III

Library Services Continued

- **Uses of Electronic Materials**
- **Uses of children's electronic materials will be pre-filled.**

Section III

Program and Activities

- A program is.....
 - An experience that provides cultural, recreational, or educational information. It is created for a group to attend at a specific time (or pre-recorded) and sponsored or co-sponsored by the library.
- A self-directed activity is.....
 - An experience that provides cultural, recreational, or educational information, created for an individual to experience on their own time in the library, off-site, or to take away.

Section III

Program and Activities

- **Program / Activity Count**
 - Each session of a series counts as a separate program
 - An individual session may count as only one program or activity regardless of multiple formats of delivery
 - Attendance should be recorded separately for each program

Section III

Program and Activities

- **Program / Activity Target Age Group**
 - Consider the intended audience for which the session was created. The actual ages of attendees **DOES NOT** determine category
 - For children's programs, choose the category which includes, or is closest to, the intended target age group
 - If the intended audience encompasses two or more groups or families, then use the **General** category

Section III

Program and Activities

- **Program / Activity Format of Delivery**
 - In-person on-site and off-site
 - Live and pre-recorded virtual

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, and TEACH Grants*)

Section V

Operating Revenue Continued

- Federal Funds.
- Contract Income, Funds Carried Forward, Other Operating Income
- Current Year (approved in 2023 for 2024 budget) 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 (Delivery Fees and Technology & ILS Service Fees)

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

- Indicate all positions funded in the library budget as of last day of 2022, regardless of whether those positions were filled.
- New this year – Appendix A – Job Titles
- 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)

Section XII

Technology - Updated Questions

- Internet Speed
- Bandwidth at peak use
- Devices that connect to Internet
 - *# of hotspots*
 - *#internet ready devices*
- External wireless access
- CIPA Compliant
- Do you offer digital literacy training

Section XIII

Self-Directed Activities

- Self-Directed Activities
 - Activities are unstructured and depend on the participation of the attendee to create the experience, rather than a structured presentation offered by librarian to a group at a set time.
- 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 – Due February 26
- 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		Page 13
STATEMENT CONCERNING PUBLIC LIBRARY SYSTEM EFFECTIVENESS		
<p>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.</p>		County <input style="width: 100%; height: 20px;" type="text"/>
<p>The <input style="width: 150px;" type="text"/> Board of Trustees hereby states that in 2020 the <input style="width: 150px;" type="text"/></p> <p style="text-align: center;"><small>Name of Public Library</small> <small>Name of Public Library System / Service</small></p> <p><input type="checkbox"/> did provide effective leadership and adequately met the needs of the library.</p> <p><input type="checkbox"/> did not provide effective leadership and did not adequately meet the needs of the library.</p> <p style="text-align: center;"><small>Indicate with an X one of the above two statements.</small></p>		
<p>Explanation of library board's response. <i>Attach additional sheets if necessary.</i></p> <p>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.</p> <div style="background-color: #e0e0e0; height: 150px; width: 100%;"></div>		
CERTIFICATION		
<p>The preceding statement was approved by the Public Library Board of Trustees.</p> <p>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.</p>		
President, Library Board of Trustees Signature or designee <input style="width: 100%; height: 20px;" type="text"/>	Name of President or Designee <i>Print or type</i> <input style="width: 100%; height: 20px;" type="text"/>	Date Signed <input style="width: 100%; height: 20px;" type="text"/>

Questions
&
Comments

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

This webinar will be
archived

Feeling...

