

# Public Libraries Annual Report

Monday, Nov. 16, 2020  
Virtual

# What is the Annual Report?

- The report is a statistical overview of a year in the life of a public library.
- Most questions are determined by IMLS (Institute of Museum and Library Services) with input from the State Data Coordinators.
- Some questions are specifically added for the Vermont Department of Libraries.

# Who Uses the Info in the Report?

## **National**

- Institute of Museum and Library Services
- Federal Government
- Other State and Public Libraries Nationwide

## **State**

- VT Department of Libraries
- State Government

## **Local**

- Your Library
- Members of the Public

# When Is the Report Due?

- The Report is due every year
- Expected Opening Date for 2020 – Dec. 1, 2020
- Due Date for 2020 – Jan. 29, 2021
- Extension available (by request) to Feb. 12, 2021

# What Time Period does it Cover?

- This part can be confusing.
- Individual libraries use many different fiscal years:
  - Calendar Year (Jan 1-Dec 31)
  - Traditional Fiscal Year (July 1-June 30)
  - Federal Fiscal Year (Oct 1-Sept 30)
  - and others!

# What Time Period does it Cover? (cont'd)

- Submit your last fiscal year that ended by Oct. 15:
  - If you follow the traditional (July-June) or Federal (Oct-Sept) fiscal years, submit the current year (2019-2020 in this case).
  - But if you follow the calendar year (Jan-Dec), you should submit last year's data (2019). I know this seems weird.
  - Note – A few libraries are off-schedule. I will get in touch with you separately.

# Updated Questions

- Changes to some questions:
  - Quite a few new questions around the COVID pandemic
  - Addition to questions about Visits and Reference Questions, to see if the number is a count or an estimate
  - Removed some less relevant tech questions
  - Simplification of language

# Basics of the Report

- If you need login info, ask Josh.
- You can work on the report in any order. You can stop and come back to the report as often as you would like, just make sure to click *Save* when you stop.
- Click *Show Last Year's Answers* in the upper-right hand corner to see last year's data.
- If you're not sure about anything, ask Josh.
- We removed the individual instructions for questions and focused on making the questions as self explanatory as possible.



# Report Overview

- Directory Info
- Staffing
- Space
- Operating Income
- Capital Revenue
- Operating Expenditures
- Holdings
- Services

# Directory Info

- Contact info (prefilled)
- Current librarian and chair of the trustees
- Hours of operation
- Weeks open per year (incl. COVID Questions)
- Population of service area (prefilled)

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## A. Directory Information : Part 1





















SHOW  
LAST YEAR'S  
ANSWERS

Save

Next

Data that you submit for this report, except for directory and contact information on lines A1 - A17, should come from your LAST COMPLETED fiscal year in the time frame of October 15, 2016 through October 15, 2017. Please be sure that the directory and contact information items on Lines A1 - A17 are current, for inclusion in the Department of Libraries Directory and to insure the ability of the Department to contact the appropriate personnel at your library.

Questions A01 through A08 are prefilled for you. If there is a need for a change, please contact Scott Murphy at the Vermont Department of Libraries, (802) 828-3261 or [scott.murphy@vermont.gov](mailto:scott.murphy@vermont.gov).

<b>A01</b> Name of Library:	<input type="text"/>	 
<b>A01a</b> Town - for Annual Public Library Report:	<input type="text"/>	 
<b>A02</b> Library Telephone Number: (Enter only numbers, no spaces, dashes or parentheses, like this: 8021234567.) If you have problems entering or correcting telephone numbers, it may be because you are using Internet Explorer as your browser. To solve that problem, turn on "Compatibility View." Instructions can be found here: <a href="http://collect.btol.com/instructions/IEHelp.pdf">http://collect.btol.com/instructions/IEHelp.pdf</a>	<input type="text"/>	 
<b>A03</b> Mailing Address - Street:	<input type="text"/>	 
<b>A04</b> Mailing Address - City:	<input type="text"/>	 
<b>A05</b> Mailing Address - Zip:	<input type="text"/>	 
<b>A06</b> Mailing Address - Zip+4:	<input type="text"/>	 
<b>A07</b> County:	<input type="text"/>	 
<b>A08</b> Physical location (example: 100 Main St. or 200 feet north of intersection of Rtes. 1 & 2):	<input type="text"/>	 
<b>A09</b> Library Website Address (URL): <a href="http://">http://</a>	<input type="text"/>	 

# Staffing

- Weekly hours for:
  - Librarians with MLS
  - Librarians with Public Library Certification
  - Librarians without MLS
  - All other staff

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**B. Staffing** [SHOW LAST YEAR'S ANSWERS](#)

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**Librarians:**  
Do you have paid staff?

Yes, we have paid staff.  [▶](#) [⌵](#)

No, we have no paid staff. (Continue to Question B06)  [▶](#) [⌵](#)

**B01a** Weekly hours paid to persons holding the title of librarian AND holding a master's degree from a program accredited by the American Library Association. If the answer is zero, please enter a zero.  [▶](#) [⌵](#)

**B01b** Weekly hours paid to persons holding the title of librarian but NOT holding a master's degree from a program accredited by the American Library Association. Include librarians who have completed the Department of Libraries training, or who are in the process of doing so on this line. If the answer is zero, please enter a zero.  [▶](#) [⌵](#)

**B02** Total weekly hours paid to persons holding the title of librarian. (Note: you cannot enter a value on this line; it is calculated for you, depending upon your entries above. (B01(a)+B01(b)))  [▶](#) [⌵](#)

**Other Staff:**

**B03** Weekly hours worked by all other staff paid from the library's budget, including clerks, security staff, pages, and maintenance staff. If the answer is zero, please use a zero.  [▶](#) [⌵](#)

**B04** Total paid staff hours in a typical week (B02 + B03) (Note: you cannot enter a value on this line; it is calculated for you, depending upon your entries above.)  [▶](#) [⌵](#)

**B05** Total number of staff hours paid weekly with funds outside the library's budget (e.g., grant funds, Vermont Associates, AmeriCorps.)  [▶](#) [⌵](#)

**B06** Total number of volunteer hours in a typical week, including volunteer librarians, board members who volunteer in the library, and persons who work behind the scenes. If the answer is zero, please use a zero.  [▶](#) [⌵](#)

# Space

- Square footage of library. This is pre-filled, but let us know if it's out of date or wrong.

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**C. Space**

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**C01** What is the current square footage of your building? (This value has been entered, based upon data reported in previous years. If there is an error, please contact Scott Murphy at the Vermont Department of Libraries, (802) 828-3261 or [scott.murphy@vermont.gov](mailto:scott.murphy@vermont.gov))

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# Operating Income

- Includes (almost) all Library income:
  - Local tax support
  - Non-resident fees
  - Donations/gifts
  - Transfer from endowment/investments
  - Grants
  - In-kind support (free service like plowing)

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**D. Operating Income By Source : Part 1**

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**Funds used to provide library services.**

When reporting on income, do **not** include cash on hand at the beginning of the fiscal year. Do **not** include income appropriated or collected for: (1) major capital expenditures, (2) as restricted contributions to the endowment, savings or for special purposes, or (3) income passed through to another agency. Capital Revenues are only reported in Section E. Restricted contributions are not reported.

**Local Tax Support:**

**D01, D02** - All libraries must enter the name of the Town in which the library is located and the tax support it provides on Lines D01 and D02. You must enter data at least for Lines D01 and D02, even if your library received no tax support. **If your library received no tax support, enter the Town in which the library is located and then enter a zero on line D02.**

Note: Some Towns treat library employees as municipal employees and pay library employee salaries and benefits (e.g., FICA or medical insurance) directly, but outside of the library budget. These payments constitute tax support for the library and should be counted in this section. If this is the case for your library, please contact the Town Clerk or Treasurer to obtain the amount of employee salaries and/or benefits paid on behalf of the library so that these amounts can be included to produce accurate totals on Line D03. These amounts will also be important in Section F, "Operating Expenditures." (Please see the example in the "help" for this question.)

If your library's tax support came from more than one municipality, provide each Town name and the amount contributed by using the "Add Town" button. You can add as many "Towns" as you need. If you click the "Add" button by mistake, simply click the "Remove" button to undo it. Please note that either the single Town contribution on line D02, or the sum of contributions from the Towns you added, will equal your total tax support shown on line D03.

**D01** Town:  [Add](#) [Remove](#)

**D02** Amount:  [Add](#) [Remove](#)

[-](#) Remove Group [+](#) Add Group

# Capital Revenue

- Revenue set aside for major capital projects.

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## E. Capital Revenue By Source

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Revenue used for major capital projects or improvements such as site acquisition, new buildings, additions or renovations, furnishings for new or expanding buildings, library automation systems, and other one-time contributions. Do not include appropriations or contributions for normal operations or for endowment or savings. If the answer is zero, please use a zero.

<input type="checkbox"/>	We received capital revenues.	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	We did not receive any capital revenues. (Continue to the next section.)	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<a href="#">E01</a>	Local government capital revenue (not revenues appropriated for normal operations.)	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<a href="#">E02</a>	State government capital revenue (not revenues appropriated for normal operations.)	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<a href="#">E03</a>	Federal government capital revenue (not revenues appropriated for normal operations.)	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<a href="#">E04</a>	Other capital revenue (including grants and fund-raising, but not revenues raised for normal operations.)	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<a href="#">E05</a>	<b>TOTAL CAPITAL REVENUE.</b> (Sum of Lines E01 + E02 + E03 + E04 ) (You cannot enter a value on this line; it is calculated for you, depending upon your entries above.)	<input type="text" value="\$0"/>	<a href="#">▶</a> <a href="#">📄</a>

# Operating Expenditures

- Includes all funds spent:
  - Collections
  - Staff (salaries and benefits)
  - Operating expenditures
  - Grant projects
  - Capital expenditures

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**F. Operating Expenditures : Part 1**

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**Current and Recurrent Costs Necessary to Provide Library Services.**

Include library expenditures as well as verifiable amounts spent by or on behalf of the library by local government, Friends groups or Trustees, even though these amounts do not flow directly through library accounts. These are amounts for which you or the group could produce a receipt or other paper trail, if necessary.

**Collection Expenditures:**

Can you specify the amounts of money spent on print materials, electronic resources and other materials?

<input type="checkbox"/>	Yes, we can specify the amounts of money spent on print materials, electronic resources and other materials.	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	No, we cannot specify the amounts of money spent on print materials, electronic resources and other materials, but we have a total amount spent on the resources and materials for the library collection. If you spent NO money on print materials, this is also the correct choice for you. ("NONE" = 0)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	We do not know how much money we spent on materials and resources for our library collection. (Continue to the next section.)	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">F04</a>	This line is for a TOTAL amount spent on the collection. Please enter your data here. If you spent NOTHING on the collection, this is also the correct choice for you. Choose this option and enter a zero (0) for the total. (If you have the data for the sub-categories listed in the previous questions, and have been presented with this total by mistake, please uncheck the box above that indicates you only have a total and check the box that indicates you can specify more detail. If you have entered data for the sub-categories above, please do not make any entry on this line.)	<input type="text"/>	<input type="checkbox"/>
<a href="#">F05</a>	<b>TOTAL COLLECTIONS EXPENDITURES (Sum of Lines F01 + F02 + F03 + F04)</b> (You cannot enter a value on this line; it is calculated for you, depending upon your entries on the lines above.)	<input type="text" value="\$0"/>	<input type="checkbox"/>

# Holdings

- Print materials
- Ebooks (incl. LUV and RBDigital)
- Video items
- Downloadable video
- Audio items
- Downloadable audio (incl. LUV and RBDigital)
- Print magazine subscriptions
- Online databases

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**G. Holdings in Library Collection : Part 1**

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Report the total holdings at the end of the fiscal year. Note: materials for "children" generally refers to materials for people under the age of 14. If you do not separate and count library holdings by age, simply fill in the "total" column. If the answer is zero, please use a zero.

**Print materials:**

Books and other non-serial printed publications bound in either hard or soft cover.

Can you specify the size of your holdings of adult and children print materials in your collection?

Yes, we can specify the size of our holdings of adult and children's print materials in our collection.	<input type="checkbox"/>	<a href="#">Print</a> <a href="#">Copy</a>
No, we cannot specify the size of our holdings of adult or children's print materials in our collection, but we have a total number of holdings in our print collection. If you have none of these items in your collection, this is also the correct choice for you. ("NONE" = 0)	<input type="checkbox"/>	<a href="#">Print</a> <a href="#">Copy</a>
We cannot specify what holdings we have in our collection. (Continue to the next section.)	<input type="checkbox"/>	<a href="#">Print</a> <a href="#">Copy</a>
<b>G01</b> Adult:	<input type="text"/>	<a href="#">Print</a> <a href="#">Copy</a>
<b>G02</b> Children:	<input type="text"/>	<a href="#">Print</a> <a href="#">Copy</a>
<b>G04</b> Total Print Holdings (Sum of Lines G01 + G02 + G03) (You cannot enter a value on this line; it is calculated for you, depending upon your entries on the lines above.)	<input type="text" value="0"/>	<a href="#">Print</a> <a href="#">Copy</a>

**Electronic books (e-books):**

Count only individual items the library has selected for inclusion in the library catalog. If your library does not select the individual titles for access by your patrons, but instead, accepts a collection of titles pre-selected for you, count the vendor or source of these items as a single database (e.g., Gale Reference Center) on Line(s) G26 - G29, as appropriate.

Can you specify the size of your holdings of adult or children's electronic books in your collection?



# Services

- Registered borrowers
- Visits
- Reference questions
- Electronic item circulation
- Online database usage
- Physical item circulation (children/adult)
- ILL's loaned/received
- Programs and attendance (children/YA/adult)
- Outreach (deliveries)
- Public computers owned & usage
- WiFi usage
- Visits to your website

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**H. Services : Part 1**

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If actual counts are available, please report them. Otherwise, please provide estimates based on a count taken during two or three typical weeks (e.g., in October and April), taking a weekly average, and multiplying by 52 (or the number of weeks open, if you aren't open all year). Libraries in resort areas will want to do separate samplings in summer or winter. A "typical week" is any time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, and days when unusual events are taking place in the community or the library. Please choose a week when the library is open its regular hours.

**Registered borrowers:**  
Can you specify the number of adult or children registered borrowers?

<input type="checkbox"/>	Yes, we can specify the number of adult or children registered borrowers.	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	No, we cannot specify the number of adult or children registered borrowers, but we have a total of all of our registered borrowers.	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	We don't know how many people are registered to use our library.	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	<b>H01</b> Number of adults:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	<b>H02</b> Number of children: (under 14. See help if you use another definition)	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	<b>H04</b> Total (Sum of Lines H01 + H02 + H03) (You cannot enter a value on this line; it is calculated for you, depending upon your entries on the lines above.)	<input type="text" value="0"/>	<a href="#">▶</a> <a href="#">📄</a>

**Visits:**  
In a [typical week](#), how many people visit the library for any reason?

<input type="checkbox"/>	We know how many people have visited the library.	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	We don't know how many people have visited the library.	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
<input type="checkbox"/>	<b>H05</b> Visits in one week:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>

# What is an Edit Check?

- Once you have entered all of your data, click *Status* in the menu. This will show if you need to complete any edit checks.
- An edit check occurs when the system thinks the data in a field looks weird.
- Typically, this means it's significantly higher or lower than last year.
- You'll need to give an explanation for the difference - we did more programming, our children's librarian was out, the entire staff was abducted by aliens.
- Once you've entered all of your checks, click *Submit Corrections* at the bottom of the page. If everything has a green check, you are set. If you see a red X, you still need to adjust something.
- If you have a question or problem, ask Josh.

# Final Steps

- Describe successes and what's new
- Include your name and title
- Director and chair of trustees certify
- Complete!

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**I. Annual Report Final Questions and Signature**

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<a href="#">I01</a> WHAT SUCCESSES HAVE YOU HAD THIS YEAR?	<a href="#">Input Answer</a>	<a href="#">▶</a> <a href="#">📄</a>
<a href="#">I02</a> WHAT'S NEW AT YOUR LIBRARY?	<a href="#">Input Answer</a>	<a href="#">▶</a> <a href="#">📄</a>
I03 Name of the person who completed this report:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
I04 Title/Position of the person who completed this report:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
I05 DATE:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>

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**CERTIFICATION**

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I have examined this application, and I hereby certify on behalf of the library that

- 1) the information provided is true and correct; and
- 2) all requirements for a complete application have been fulfilled; and
- 3) the library authorizes the State of Vermont Department of Libraries to verify the information provided, if necessary.

Librarian:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
Date:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
Chairperson, Board of Trustees:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>
Date:	<input type="text"/>	<a href="#">▶</a> <a href="#">📄</a>

# What Happens After You Submit?

- Libraries fill out the form completely and respond to all edit checks.
- Director and Head of Trustees certify the form.
- Josh chases down late submissions.
- Josh submits to the IMLS portal. This is a back and forth process, where I slowly resolve hundreds of minor issues, before the system accepts the data.
- IMLS staff come back with any remaining questions on the data.
- State Librarian certifies the form.
- Complete!

# Important Notes

- Single - Avoid having more than one person (or even more than one tab) logged in to the survey site at once. It's easy for data to get overwritten.
- Browser Buttons - You should avoid using your browser's back and forward buttons within the survey site. Instead use the site's *Prev / Next* buttons and the left side navigation to move between the pages. The survey is made to save content when any of those are clicked, while forward and back can cause it to lose filled-in information or otherwise behave strangely.
- Browsers - Google Chrome seems to work best (if available). Mozilla Firefox should work, but could have quirks. Please avoid Microsoft Edge, as there are reports of issues.

# COVID Changes in 2020

- There will be quite a few new questions in the 2020 Annual Report in light of the COVID pandemic.
- These include: weeks closed and hours open; curbside patrons and circulation; in-person, virtual, and recorded programming; passive activities; and yes/no pandemic questions.
- We realize that you may not have data for some of these questions – just do your best with what you have.
- For libraries whose reporting periods don't include the pandemic, you'll be entering N/A or -1 for most of these questions. If you happen to have numbers for some questions (for example, virtual programming), feel free to submit it.

# COVID Changes in 2020 - Hours

- Weeks closed to the public (meaning patrons cannot enter the building)
- Annual hours open normally
- Annual hours open by appointment
- Annual hours open for curbside pickup
- Only count the “most open” level. For example, if you are simultaneously open normally and for curbside during a time period, only count it as open normally.

# COVID Changes in 2020 - Curbside

- Number of users who stopped by to pick up items
- Number of circulations through curbside or delivery (note – these are still included in your regular circ numbers)



# COVID Changes in 2020 – Programming I

- For 2020, we have broken programming into In-Person and Virtual (live but online)
- Programs are counted by the age group they focus on – Adult, Children, and Young Adult, or you can give an undifferentiated total.
- Attendance is likewise broken down by the focus of the program, not the age of the attendee (e.g. a child at an adult program counts as adult attendance).

# COVID Changes in 2020 – Programming II

- Recorded programming counts programs that were pre-recorded, as well as programs that were live but that patrons could view later.
  - So if you have a live virtual program, and then the recording is available after, it's counted twice (under virtual and recorded).
- Count views for these programs. For Facebook, look for 1-minute views; for anything else, unique views.
- Neither programs nor views are broken down by age.

# COVID Changes in 2020 – Passive

- We've added a question for passive programming.
- First, count the number of different programs. Each time you significantly rework the program (a different theme for your craft bag, or new story walk), it's a new program.
- Next, come up with an estimate for number of participants. For take-home items, it's a rough estimate. For outdoor programs, it's a really really rough estimate.
- These questions are not broken down by age.

# COVID Changes in 2020 – Pandemic

- Finally, IMLS has added 13 yes/no/not applicable questions about things your library may have done during the Pandemic. Examples include increasing electronic collection, offering reference service while closed, and providing WiFi outside of the building.

# Thanks!!!

- Thanks to everyone for attending today!
- And thanks for all the time and effort that you put into the Annual Report!