New York State Library

Annual Report for Public & Association Libraries 2016
Outline of Major Changes

LIBRARY DATA REPORT

Following are changes to the 2016 Public & Association Library Annual Report – Questions and Instructions

NOTES:
- Please expect a minimal amount of re-numbering due to questions added or re-ordered since the 2015 Annual Report. Not all instances of re-numbering are noted in this outline.
- Please see updates in instructions and rewording in questions and instructions. Not all changes are noted in this outline.
- Instructions intended for more than one question are marked as such.
- Responses to new questions may be estimated or left blank for the first year.

2016 Changes to Part 1: General Library Information

Three New Questions for NYC Libraries Only – All others proceed to the next question
1.36a - President/CEO Name
1.36b - President/CEO Phone Number
1.36c - President/CEO Email

1.40 New Question – Education level of Manager/Director

"What is the highest education level of the library manager/director?"
The dropdown choices are: High School Diploma, Two or More Years of College/University Study, Bachelor's Degree, Master's Degree, Other.

1.41 New Question – Type of Degree held

"If the library manager/director holds a Master's Degree, is it a Master's Degree in Library/Information Science?" Enter Y for Yes, N for No.

1.42 New Question – Active Certificate

"Do all staff working in public librarian positions have an active NYS Public Librarian Certificate? If No, list the name and e-mail address of each staff member without an active certificate in a state note." Enter Y for Yes, N for No.

Instructions for Q1.42

"Please indicate if all staff working in public librarian positions have active NYS Public Librarian Certificates. If a Public Librarian Certificate was issued after December 2009, professional development is required every 5 years in order to maintain one's certificate. If a certificate is not renewed the status will become 'inactive.' The status of public librarian certificates can be checked at http://www.nysl.nysed.gov/libdev/cert/search.htm "

1.46 New Question – NYS / Local Retirement System

"Is the library a member of the New York State and Local Retirement System?"
Enter Y for Yes, N for No.

Instructions for Q1.46

"Please report Yes if the library is a member of the New York State and Local Retirement System. Please note that the NYS Teacher's Retirement System is a separate entity from the New York State and Local Retirement System. Libraries that are members of the NYS Teacher's Retirement System should respond No to this question."

2016 Changes to Part 3: Library Programs, Policies, and Services

New Instructions added for Questions 3.1 through 3.67 (Instructions Document)

"Library-sponsored programs are programs sponsored by the library and held either at the library or at another location. Do not count programs that had zero attendance. Staff and/or volunteers presenting or assisting with a session should not be counted as attendees."

3.21 New Question – Group Presentations/Information Tables

"Do library staff, trustees and/or volunteers reach outside of the library to promote library programs and services through group presentations, information tables and/or other similar educational activities sponsored by the Library?" Enter Y for Yes, N for No

Instructions for Q3.21

"Please include only those presentations/community events at which library staff, trustees or volunteers were present and providing information to people about the library. Do not include unstaffed displays or exhibits."

New Instructions added for Questions 3.22-3.24, 3.26, 3.27 [Attendance] (Instructions document)

"Scheduled computer assistance for an individual (whether scheduled with one person or set up as a walk-in time for computer assistance) may be counted as a one-on-one session; 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. Computer assistance questions that arise during non-scheduled times should be counted as reference questions regardless of how much time is spent with the individual."

2016 Changes to Part 4: Library Transactions

4.11 New Federal Question – Physical Item Circulation
This is a calculated field (Total questions 4.7 & 4.10)

New Section header added: ELECTRONIC USE

Under that new section three new Federal Questions were added:

Q4.13 Successful Retrieval of Electronic Information

Instructions for Q4.13

"The number of full-content units or descriptive records examined, downloaded, or otherwise supplied to user, from online library resources that require user authentication but do not have a circulation period. Examining documents is defined as having the full text of a digital document or electronic resource downloaded or fully displayed. Some electronic services do not require downloading as simply viewing documents is normally sufficient for user needs. Include use both inside and outside the library. Do not include use of the OPAC or website. [based on NISO Standard Z39.7 (2013) #7.7, p. 43]"

4.14 New Federal Question - Electronic Content Use
This is a calculated field (Total questions 4.12 & 4.13)

4.16 New Federal Question – Total Collection Use
This is a calculated field: (Total questions 4.13 & 4.15)

General guidance regarding retrieval of electronic information vs. circulation:
If an item can be downloaded and kept forever it should not be counted under circulation. For example, Zinio should only be counted under successful retrieval of electronic information, not circulation. Freading and Hoopla items are only available for a limited period of time so they should be counted under circulation. Use of NOVELNY databases should be counted under successful retrieval of electronic information if the usage statistics are available for your individual library.

2016 Changes to Part 5: Technology and Telecommunications

Former Q5.6 Number of uses (sessions) of public internet computers per year, has been moved to Section 9 Service Outlet Information, Q27.

2016 Changes to Part 9: Service Outlet Information

Spreadsheet Option
A template will be available (via a link) with last year's data. The template may be updated with the current year's data and then sent to Baker & Taylor to upload into the library's report. Libraries may also enter the data as in the past if that is preferred (this may be easier for those with only one outlet).

2016 Changes to Part 10: Officers and Trustees

New Section header added: NUMBER OF TRUSTEES AND TERMS
Under this section header the following new questions were added:

10.2 to 10.5 – Number of Trustees
10.2 - "Does your library have a range of trustees stated in the library's charter (incorporation)?"
Enter Y for Yes, N for No

10.3 – "If yes, what is the range?"
10.4 – "If your library has a range, how many voting positions are stated in the library's current by-laws?"
10.5 – "If your library does not have a range, how many voting positions are stated in the library's charter (incorporation)?"

10.6 – 10.7 – Trustee Term Length
10.6 – "Does your library's charter (incorporation) state a specified term for trustees? If no, please explain in a state note." Enter Y for Yes, N for No
10.7 – "If yes, what is the trustee term length, as stated in your library's charter (incorporation)?"

10.20 Change in Dropdown – Office Held by Trustee
"Treasurer" has been replaced with "Financial Officer."

10.22 New Question – Trustee Term

"Is this trustee serving a full term? If No, add a State Note (for example, this trustee was appointed to complete the remainder of a term of a trustee who resigned their position)." Enter Y for Yes, N for No
In the Trustee section this is Q13.

Instructions for Questions 10.2, 10.4, 10.6 and 10.8

"These fields will be locked next year so please make sure the answers match your library's charter (incorporation)."

12/23/2016