

Annual Report

FY2020





Workshop Schedule:

2:00-2:30/45 Report Overview

2:30/45-3:00 Q&A with STLS Consultants

3:00 **STRETCH BREAK & RAFFLE**

3:10-4:00 Q&A with STLS Consultants

Due Date

- The report is due on **Friday, March 5th, 2021, at 5:00pm.**
- Complete all sections/questions, **INCLUDING the SUGGESTED IMPROVEMENTS section,** review edit checks, SAVE, and submit by 5pm!

Collect Connect - Annual Report Portal

Baker & Taylor provides the report portal - **CollectConnect**.



- URL: <https://collectconnect.baker-taylor.com/>
- The portal is compatible with major internet browsers including Google Chrome, Mozilla Firefox, and Internet Explorer.

WARNING

Only one user should be logged into a library's report at a time to avoid loss of data. If you file for multiple libraries, please only log into one report at a time!

Data Provided by STLS

We've done a lot of the work for you!

Find numbers provided by STLS, here:

<https://www.stls.org/annual-report-to-the-state-fy2020/>



Home COVID Resources About STLS Services Quick Links For the Public

Annual Report to the State FY2020

Home Annual Report to the State FY2020

Annual Reports are due to STLS on Friday, March 5th, 2021!

Submit your report by 5:00pm on 3/5/2021.

Contact Erika Jenns, jennse@stls.org, with questions.



In 2021, STLS will host TWO virtual Annual Report Parties!

Party #1: 2:00pm – 4:00pm, Tuesday, February 2, 2021

Register Here: <https://stls.libcal.com/event/7350350>

Party #2: 10:00am – 12:00pm, Wednesday, February 10, 2021

Register Here: <https://stls.libcal.com/event/7350352>

Access the **Annual Report Portal** (Bibliostat Collect Connect by Baker & Taylor)
here: <https://collectconnect.baker-taylor.com/>

Forgot your **password**? Email Erika Jenns: jennse@stls.org

Instructions, Outline of Major Changes, COVID-19 Questions, etc.

Download a blank copy of the FY2020 survey [here](#).

Section 1: General Library Info

Search the Catalog



Search in STARGAT

GO!

Upcoming Events

February 2021						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Upcoming Events:

Annual Report Party #1

Tue Feb 2nd 2021 12:00pm

Annual Report Party #2

Wed Feb 10th 2021 10:00am

STLS CLOSED

Mon Feb 15th 2021 All Day

ILS Meeting

Wed Feb 17th 2021 9:30am

Director Evaluations: A

Workshop for Trustees &

Directors

Thu Feb 18th 2021 4:00pm

[Show All](#)

STLS Events

Calendar

See the full calendar, [here](#).

Data Provided by STLS

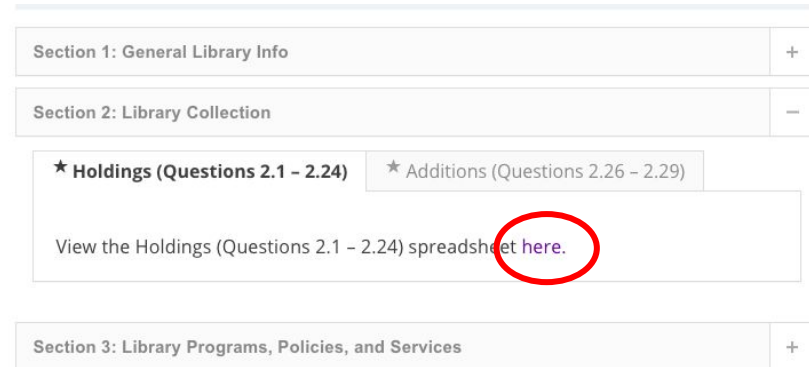
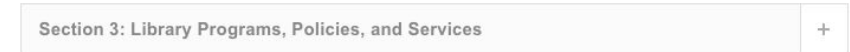
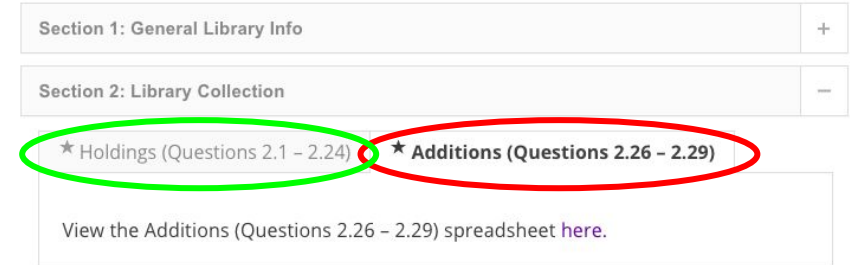
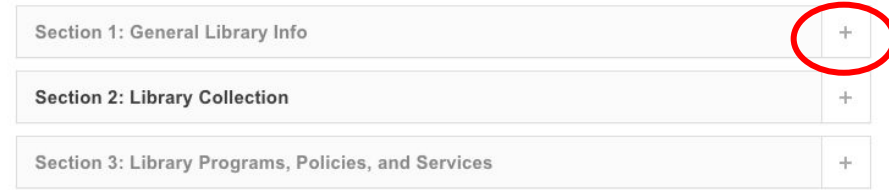
The website looks a bit different this year.

Each section of the report has a corresponding section on the website.

Click the “+” to expand each section.

NOTE: There are multiple tabs under each section heading.

Look for hyperlinked words like “here” - leads to a Google Sheet to see data.



Overview of Registered Borrowers Data with Mandy

registered
borrowers?

where do i find
those numbers?



Resident & Non-Resident Borrowers

- 3.2 Registered Resident Borrowers – Count the total number of individual borrowers, registered by the library as library cardholders that **reside in the library's chartered service area**. Multiply by 2.77 if registration method is by household or family.
- 3.3 Registered Non–Resident Borrowers – Report the total number of individual borrowers, registered by the library as card–holders, that do not reside in the library's chartered service area. Include here individuals that reside in areas the library has contracted to serve.

Resident & Non-Resident Borrowers

Display User • Modify User •

Alerts Notes

Name: FLEMING, AMANDA
Id: 1003100005373
Group ID:
Profile name: STAFF...

Identify User

User ID: 1003100005373

Basic Info Privilege Demographics Addresses Extended Info

City:	PENNSYLVAN	Hold Notice:	
Overdue Notice:		Assumed Lost:	
Announcement:	EMAIL	Collections:	
User cat7:		User cat8:	
User cat9:		User cat10:	
User cat11:		User cat12:	
Department:		Birth date:	10/17/1980 *
Language:	ENGLISH	Age:	40

Where the information in the rows is coming from.

Alfred Example – Let's pretend...

A	B	C	D
2020 Registered Borrowers			
Data provided for Jan-Dec FY2020.			
	ADDISON	ALFRED	ALMOND
All	2,970	1,357	
Resident	2,500	1,131	
Non-Resident	470	226	
ADDISON	2500	1	
ALFRED		1131	
ALFREDSTAT		92	
ALLEGANCTY			
ALLENTOWN			
ALMA			
ALMOND	1	42	
ALPINE			
ANDOVER		22	
ANGELICA			
ARKPORT			
ASHLAND			

Resident: $1131+92=1223$
 Non-Resident: $226-92=134$

A	B	C	D
FY2020 (Jan-Dec)			
Registered Borrowers - No User Cat1			
[Not labeled]	ADDISON	ALFRED	ALMOND
14527			
ADDIS ABABA, NY			
ADDISON, N.Y.			
Addison, NY			
ADDISON, NY	2		
AIKEN, NY			
ALBANY, NY			
ALFRED, NY		1	
ALFRED STATION, NY		3	
Alfred, NY		1	
ALFRED, NY		3	
ALMA, NY			
ALMA, NY			
ALMOND, NY		1	2
ALMOND, NY 14804			1
Alpine NY			
ALPINE NY			

Resident: $1223+8=1231$
 Non-Resident: $134-8=126$

Data check: $1231+126=1357$
yesssss!!

Resident & Non-Resident Borrowers: Takeaways

- If you want to be accurate, look at tab 2 and recalculate, if you want to be extremely accurate, look at tabs 2 & 3 and recalculate
- The final total will not change
- If you add to Resident, subtract from Non-Resident
- If you are unsure of your service area, or need a 2nd brain to review your numbers, ask us 😊

Tell Your Library's Story

As you complete the annual report, think of the process as telling the story of your library in 2020.

- How were you funded? Was there a vote?
- How was circulation in 2022?
 - Was there a significant change?
Tell us why in a note.
- How about your collection?
Did you do a major weeding project?
 - Share that story in a note!

**When you notice a significant change,
include a note.**



Tell Your Library's Story

The state knows that COVID-19 impacted library services in 2020.

Do not include this in Q1.49 - Unusual Circumstances.



Adding Notes

When writing a note, you must include a valid explanation

- So, write more than “This is correct.” Explain why.
- For example, if there was a significant change in your library’s operating funds – include an explanation!

11. OPERATING FUNDS RECEIPTS : Part 4

SHOW ANSWERS

11.26 **GRAND TOTAL RECEIPTS, BUDGET LOANS, TRANSFERS AND BALANCE** (Add Questions 11.20, 11.21, 11.24 and 11.25; Same as Question 12.41)

\$120,005 ?

NOTE PREVIOUS YEAR

CLOSE SAVE

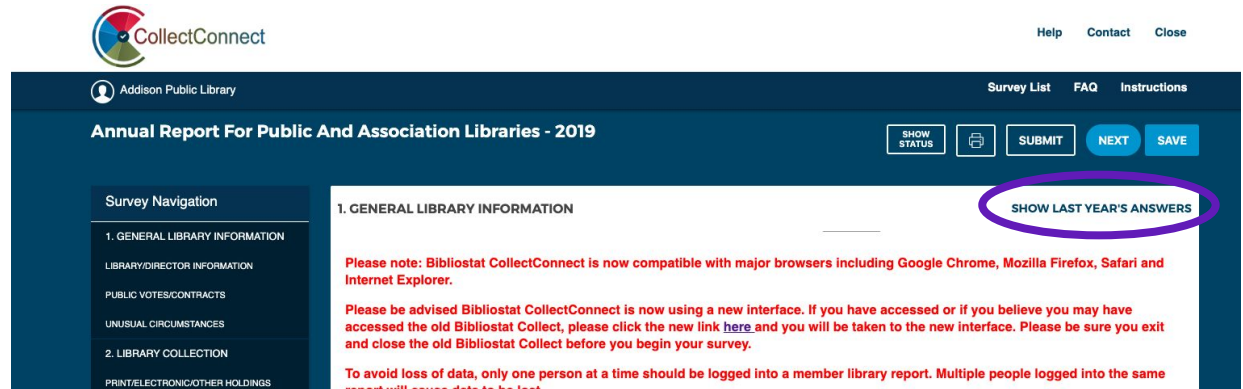
PREV NEXT

FLAG NOTE

Turn on “Show Last Year’s Answers”

This will help you see how your library has grown and changed over the last year.

- Compare the answers you are entering today to what was entered in FY2019.
- If there has been a significant change from FY2019 to FY2020 enter a note!



CollectConnect

Help Contact Close

Addison Public Library

Survey List FAQ Instructions

Annual Report For Public And Association Libraries - 2019

SHOW STATUS PRINT SUBMIT NEXT SAVE

Survey Navigation

- 1. GENERAL LIBRARY INFORMATION
- LIBRARY/DIRECTOR INFORMATION
- PUBLIC VOTES/CONTRACTS
- UNUSUAL CIRCUMSTANCES
- 2. LIBRARY COLLECTION
- PRINT/ELECTRONIC/OTHER HOLDINGS

1. GENERAL LIBRARY INFORMATION

Please note: Bibliostat CollectConnect is now compatible with major browsers including Google Chrome, Mozilla Firefox, Safari and Internet Explorer.

Please be advised: Bibliostat CollectConnect is now using a new interface. If you have accessed or if you believe you may have accessed the old Bibliostat Collect, please click the new link [here](#) and you will be taken to the new interface. Please be sure you exit and close the old Bibliostat Collect before you begin your survey.

To avoid loss of data, only one person at a time should be logged into a member library report. Multiple people logged into the same report will cause data to be lost.

SHOW LAST YEAR'S ANSWERS

SAVE. SAVE. SAVE.

- Save every page before you click **Next**.
- Save even if you haven't entered any new information on the page!
- Calculations may not change until you've clicked "SAVE."



Addison Public Library

Survey List FAQ Instructions

Annual Report For Public And Association Libraries - 2018

SHOW STATUS PRINT SUBMIT **SAVE**

Survey Navigation

11. OPERATING FUNDS RECEIPTS : Part 4

SHOW LAST YEAR'S ANSWERS

Help Contact Close

Survey List Instructions

SHOW STATUS PRINT SUBMIT **SAVE**

SHOW LAST YEAR'S ANSWERS

TRANSFERS AND
id 11.25; Same as

FLAG NOTE

PREV NEXT

Suggested Improvements Section

- You must complete the questions in this section!
- If you do not complete this section, the State will ask me to contact you again in a few months, and you'll have to complete it then.

Please complete all fields in Suggested Improvements before you submit!



16. FEDERAL TOTALS

17. FOR NEW YORK STATE LIBRARY
USE ONLY

SUGGESTED IMPROVEMENTS

Changes & New Sections for FY2020 Report

Given the unanticipated operational challenges impacting New York's libraries, the State Library will be extending the due date of the annual reports to April 1, 2021. REPORTS ARE DUE TO STLS on Friday, March 5th!

Please expect a minimal amount of re-numbering due to questions added or re-ordered since the 2019 Annual Report. Please see updates in Instructions and rewording in questions and Instructions.

Responses to new questions requiring numerical data may be estimated or left blank for the first Year. New COVID-19 questions will appear in Part 8- Public Service Information as Part 8A.

Section 3: New Question: "Regarding the number of Library Visits entered, is this an annual count or an annual estimate based on a typical week or weeks?" Select one of the following: (dropdown) CT - Annual Count, ES - Annual Estimate based on Typical Week(s)

Q3.16 – 3.27 (Library Sponsored Programs) – See updated Instructions and definitions.

Changes & New Sections for FY2020 Report

Section 7: Minimum Public Standards - Compliance in 2020 is not required because of COVID.

NOTE: You must complete Section 7 twice. The first time for FY2020 (as of 12/31/2020), the second time for FY2021 (as of 1/1/2021).

Section 4: New Question: "Regarding the number of Reference Transactions entered, is this an annual count or an annual estimate based on a typical week or weeks? " Select one of the following: (dropdown) CT - Annual Count, ES - Annual Estimate based on Typical Week(s)

Section 8A: New to the FY2020 report. These questions pertain to COVID-19. Most are Yes/No questions.

Section 9: Trustee Education – See updated instructions

Addition: "Complete one record for each person serving as a trustee as of December 31, 2020. These trustees will not be exactly the same as the trustees listed in the section above."

***Trustees listed in Section 9, should be those trustees on the board as of 2/1/2021.

HOWEVER, when answering the Trustee Education section, respond for trustees as of 12/31/2020.***

How to count recorded and live virtual sessions:

Libraries should report recordings of program content during COVID-19 in Section 8A, questions CV9 and CV10, but recorded-only (never offered live) programs should not be counted in Section 3.

CV9 Did the library create and provide recordings of program content via the Internet during the Coronavirus (COVID-19) pandemic?

CV10 Report total number of recordings of program content during COVID-19 pandemic. Optional response. Responses to new questions requiring numerical data may be estimated or left blank the first year.

If presented live, and a recording posted later, the LIVE portion counts in Section 3 as a program. Only interactions with the LIVE component count as attendance.

Interactions with a program recording do not count as attendance. Attendance is not counted for a program that is recorded - only the number of total recordings are counted.

How to count Take-n-Makes:

Take-n-Makes/Grab-n-Go's can be counted as passive programs under question Q3.22 One-on-One Program Sessions with a note added to explain the increase from FY2019 to FY2020.

***If libraries have not broken out Make & Take activities and have already reported them on the Summer Reading at New York Libraries program evaluation, we suggest for the purposes of the 2020 annual report, that they report in the same method in order to align with the NYS Library 2020 Summer Reading program evaluation.

NOTE FOR FY2021: Going forward, we recommend that data for passive or self-directed programs be collected separately for reporting purposes beginning in 2021. This will help ensure data consistency across all the states in the Public Library Survey.

Submitting!

- Before submitting – PROOFREAD!
 - Make sure there are no unanswered questions
 - Look at your (red) edit checks
 - Look over the notes that you've added and/or be sure to add a note if numbers differ substantially from the previous year.
- You can submit the report at any time. Submitting the report will lock it.
- BUT we can unlock your report anytime, so don't worry if you accidentally hit submit - just email Erika.

**Reports are due to STLS on
Friday, March 5th, 5:00pm.**



Raffle



Questions?



3:00
Stretch Break!



Questions?



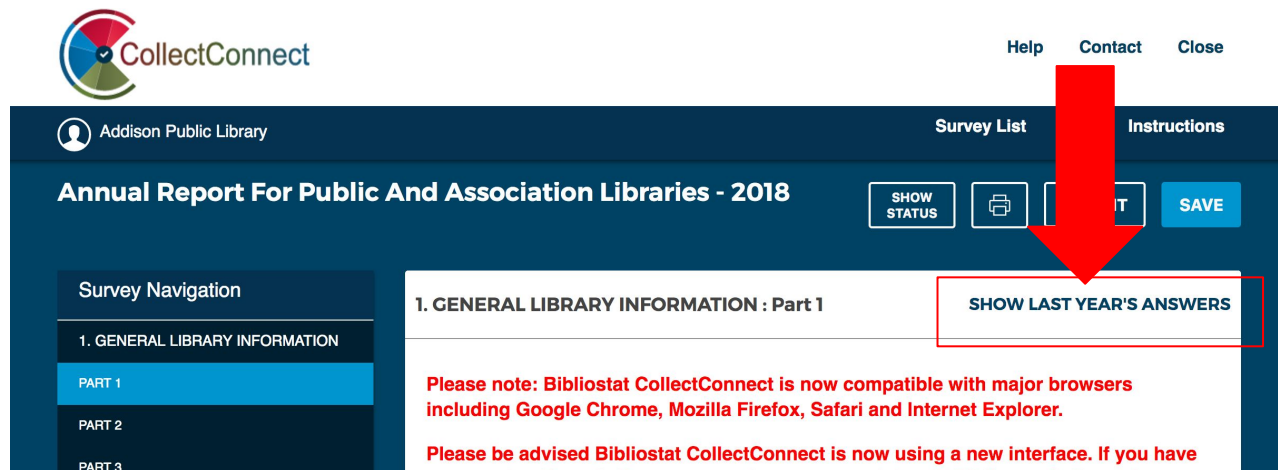
Step-by-Step

The next group of slides include instructions & tips
for each section of the report.



Getting Started

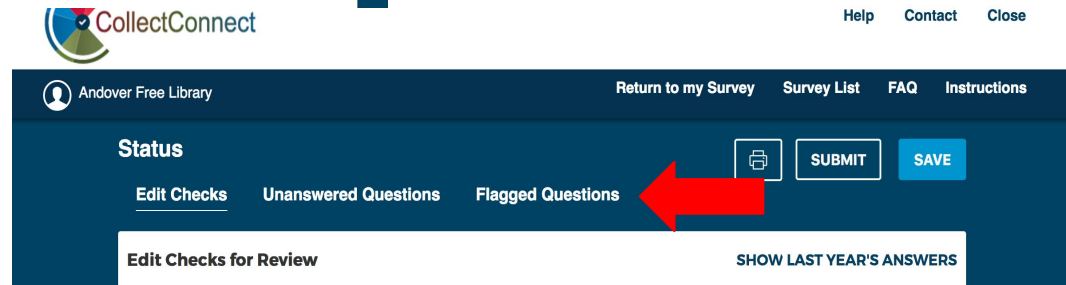
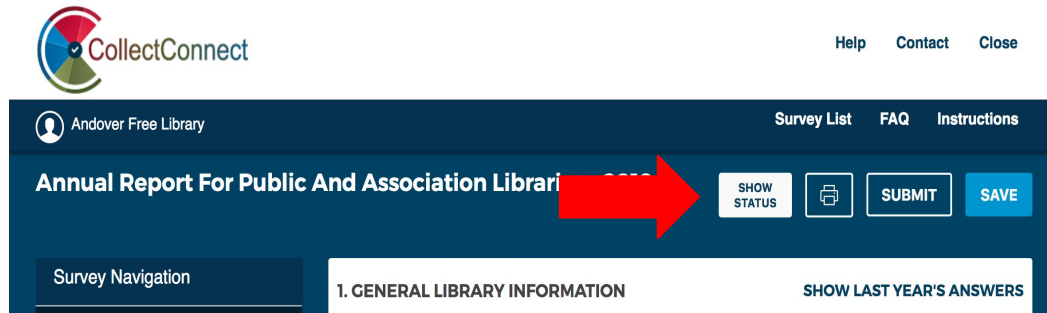
- Log into the portal: <https://collectconnect.baker-taylor.com/>
 - *Need your login information? Contact Erika Jenns, jennse@stls.org*
- Open your FY2020 report
- Select “show last year’s answers” - at the top right corner



The screenshot displays the CollectConnect portal interface. At the top, there is a navigation bar with links for Help, Contact, and Close. Below this, the user is logged in as Addison Public Library. The main heading is "Annual Report For Public And Association Libraries - 2018". On the left, there is a "Survey Navigation" sidebar with options for "1. GENERAL LIBRARY INFORMATION", "PART 1", "PART 2", and "PART 3". The main content area is titled "1. GENERAL LIBRARY INFORMATION : Part 1". In the top right corner of this area, there is a button labeled "SHOW LAST YEAR'S ANSWERS", which is highlighted by a red arrow. Other buttons visible include "SHOW STATUS", "PRINT", and "SAVE".

Navigating the Portal

- Use the tab button to get from question to question - **NOT** enter
- Use the “Show Status” tab at the top menu bar to see your progress, review your edit checks, unanswered/flagged questions



Section 1

- Report all information in Part 1 as of December 31, 2020, except for questions related to the current library director/manager (questions 1.37 through 1.44).
- NOTE: For questions 1.37 through 1.44, report all information for the current library director/manager.
- Please DO NOT list the pandemic under Q1.49. DLD assumes all libraries were impacted by COVID-19.
- Q1.11 & 1.12: Enter the correct fiscal year for your library
- Q1.46: Respond yes if your library funding (all or part) was subject to a public vote - **even if your vote was unsuccessful!**
 - **Was there a vote in 2020? Check Yes, enter info.** If Yes, complete one record for the public vote from each funding source. If no, go to question 1.47.
 - **If you have a public vote mechanism, but you did not hold a vote in 2020 - answer “No.”**
 - **If you have a 259, write “School District”**
 - **CCLD is the only “special legislative district! Everyone else is school/town/village**
 - Your response to Q1.46, #5 “What type of public vote was it?” - must agree with your responses to questions #1-4 under Q1.46.
- Q1.47: If you answered “N” in 1.46, have you ever have a vote? Answer “Y” in 1.47, if you’ve ever had a public vote.
- Part 1.48: Only answer “Y” if you have an actual contract. **DO NOT** answer “Y” just because you serve the neighboring town population - you must have a contract & be paid.
- Q1.49: Only answer “Y” if your library experienced any unusual circumstances - natural disaster, fire, closed for renovations, etc. *If you did not experience any of these, answer “N” and move on to Section 2: Library Collection. Please DO NOT list the pandemic under Q1.49. DLD assumes all libraries were impacted by COVID-19.

Section 2

Answers for this section can be found in spreadsheets prepared by STLS! Available here:

<https://www.stls.org/annual-report-to-the-state-fy2020/>

- This section of the survey (2.1-2.24) collects data on selected types of materials. It does not cover all materials (i.e., microforms, loose sheet music, maps, and pictures) for which expenditures are reported under Print Materials Expenditures, Electronic Materials Expenditures, and Other Materials Expenditures (questions 12.6, 12.7 and 12.8).
- Under this category report **only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location**; inclusion in the catalog is not required. **Do not include items freely available without monetary exchange.**
- **Questions 2.1-2.24 - Use Holdings spreadsheet from STLS**
 - Questions 2.1-2.9: items must circulate and be accessible with a library card. Do not include items in the “free” bin.
 - Question 2.9: count items that you keep in the library/items you maintain.
 - Question 2.13: Provided by STLS (OverDrive). This answer will be the same for most libraries.
 - Question 2.14: Provided by STLS. Ancestry - Any databases that the system owns/Any databases that the library has. *RBDigital is one electronic collection, do not count individual titles.
 - Question 2.19: other items like photos on a CD, etc.
 - Question 2.21: CDs
 - Question 2.22: DVD/Bluray
 - Question 2.23: Microfilm
 - Question 2.26: ONLY subscriptions that are paid for - not donated magazines!
- **Questions 2.27-2.30 - Use Additions spreadsheet from STLS**
 - Question 2.29: OverDrive (number provided by STLS)

Section 3

- See instructions and FAQs for Section 3 below.
 - Instructions:
<https://docs.google.com/document/d/1nszwnoltO6M6Q48nSD9BmijU9XxOws3YrUgHJCbjD6M/edit#heading=h.w86hngoguo2>
 - FAQs:
https://docs.google.com/document/d/1Po9UIN-2w2b2Dc_3c25CX2Jj-dkrhuNAD7SvWqW8n2A/edit
- Q3.1-3.3: Please report information on LIBRARY USE as of the end of the fiscal year reported in Part 1.
- Q3.2-3.3: Registered Borrowers - Data provided by STLS
 - Use spreadsheets on STLS website for questions 3.2 & 3.3 (registered borrowers):
<https://www.stls.org/annual-report-to-the-state-fy2020/>
 - NOTE - the totals provided for your library may not include all cities/towns/townships/etc. where patrons are registered. Please review the raw data and add all relevant locations for your library! Email Mandy Fleming for help (fleminga@stls.org).
- Q3.4-3.10: Please report information on WRITTEN POLICIES as of 12/31/20.
- Q3.11-3.14: Please report information on ACCESSIBILITY as of 12/31/20.
- Q3.15: STLS provides a list of libraries that participate in TBBL.
<https://www.stls.org/annual-report-to-the-state-fy2020/>
- Q3.17-3.29: Please report information on LIBRARY SPONSORED PROGRAMS as of the end of the fiscal year reported in Part 1.

Section 3 *(continued)*

- Q3.22: Take-n-Makes/Grab-n-Go's can be counted as passive programs under question Q3.22 One-on-One Program Sessions with a NOTE added to explain the increase from FY2019 to FY2020.

****If libraries have not broken out Make & Take activities and have already reported them on the Summer Reading at New York Libraries program evaluation, we suggest for the purposes of the 2020 annual report, that they report in the same method in order to align with the NYS Library 2020 Summer Reading program evaluation.**

- Q3.29: See updated instructions: If one walk-in time is scheduled but individual brings along an additional person, count as 1 session with 2 attendees.
- Q3.30-3.51: Please report information on SUMMER READING PROGRAMS for the 2020 calendar year.
- Q3.52-3.58: Please report information on EARLY LITERACY PROGRAMS for the 2020 calendar year.
- Q3.59-3.64: Please report information on ADULT LITERACY for the 2020 calendar year.
- Q3.65-76: Please report information on PROGRAMS FOR ENGLISH SPEAKERS OF OTHER LANGUAGES (ESOL) for the 2020 calendar year.
- Q3.77-3.81: Please report information on DIGITAL LITERACY for the 2020 calendar year.
- When counting attendance, instructors do not count. **Do not count a program with no attendees!**
- **Recorded and Live Programs - See guidance from NYS here:**
https://docs.google.com/document/d/1Po9UIN-2w2b2Dc_3c25CX2Jj-dkrhuNAD7SvWqW8n2A/edit?usp=sharing

Section 4

Answers for this section can be found in spreadsheets provided by STLS:

<https://www.stls.org/annual-report-to-the-state-fy2020/>

- Report all transactions as of the end of the fiscal year reported in Part 1.
(Please note: Internal Library usage is not considered part of circulation)
- Questions 4.1-4.21: Use Transactions spreadsheet from STLS
 - Question 4.12 refers to OverDrive
 - Count things that circulated electronically, with a limited use time - OverDrive
 - Do not count RBdigital magazines here!
 - Question 4.13 refers to RBDigital, NovelNY
 - Successful retrieval of electronic information - 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. Use of NOVELNY databases should be counted under successful retrieval of electronic information if the usage statistics are available for your individual library. Use of electronic collections, such as EBSCO, Gale, and RBdigital, should be counted here.
- Question 4.19: Yes; through CCLD
- Questions 4.20 & 4.21: ILL; **use the spreadsheet provided by STLS (see link above).**

Section 5

- Section 5: Technology and Telecommunications
- Question 5.1: ILS/Workflows = “Y”
- Question 5.2: OPAC = “Y” - STARCcat!
- Question 5.3: “Y”
- Q5.4: Count annual visits to the library via the Internet. A visit occurs when a user (internal or external) connects to the library’s web site for any length of time or purpose, regardless of the number of pages or elements viewed. For example, if a user visits the library’s web site and looks at 16 pages and 54 graphic images, your web server records this as a single visit.
- Question 5.6: Social media - Does your library use social media (Facebook, Instagram, Twitter)? Y/N
- Question 5.7-5.9: E-rate, **see spreadsheet from STLS**
<https://www.stls.org/annual-report-to-the-state-fy2020/>



Section 6

Note: Report figures as of the last day of the fiscal year reported in Part 1.

- Include the FTE for all positions funded in the library's budget whether those positions are filled or not.
- This report requires conversion of part-time hours to full-time equivalents (FTE). To compute the FTE of employees in any category, take the total number of hours worked per week for all budgeted positions in that category and divide that total by the number of hours per week the library considers to be full-time. Report FTE to two decimal places.
- Question 6.1: If $FTE=40$, then $Q6.2=0.5$, if you (the director) work 20 hours/week. This should be no more than 40 hours per week.
- Q6.2-6.5: Library director vs manager, certified vs not certified – A library can only have one or the other. Positions counted in this series require a NYS Public Librarian's Certificate, whether provisional or permanent. For question 6.2, do not list an interim or acting director. **List only an official director who has been appointed by the board.**
- Q6.6-6.9: Under "Library Manager", count the position of library director where employee does not hold a NYS Public Librarian's Certificate.
- Under Library Specialist/Paraprofessional, count the position with the title of librarian where the employee does not hold a NYS Public Librarian's Certificate and does paid work that usually requires a certified librarian with professional training and skill in the theoretical or scientific aspects of library work.

Section 6 *(continued)*

Question 6.14: If the library doesn't have librarian positions, don't answer 6.14.

- 6.14: Answer if you have an entry level librarian position – whether or not it's filled
- 6.15: Current salary if the position were to be filled, not the current salary of the person in the position. Give the salary if the position were to be filled at the entry level.
- Library director salary – current salary. Not if filled. **Exactly what the director makes right now.**
- Report the entry level librarian and Director/Manager FTE and the current annual salary as of the end of the fiscal year for this position, even if vacant.
- If a position is vacant, indicate the FTE and annual salary that the employee would earn at the entry level, as if the position were filled.
- If there is no set “annual” salary figure for any position, then multiply the hourly salary by the number of hours worked per week by 52 weeks (i.e. hourly salary x number of hours worked per week x 52 weeks).
- FTE should not be greater than one.
- **The number of hours worked per week should not be greater than 40.**

Section 7

- For FY2020, compliance with minimum public library standards has been waived by DLD as a result of the pandemic. **You must still complete this section, but no variance is required.**
- As of January 1, 2021, libraries in NYS MUST comply with updated Minimum Standards, developed by the Division of Library Development. Compliance will be reported on the FY2021 annual report.
- Question 7.17: If you use an online fax application, answer “Y” here

NOTE: You must complete Section 7 twice. The first time for FY2020, the second time for FY2021.

FY2020: Report all information as of December 31, 2020.

FY2021: As of January 1, 2021 all public, free association and Indian libraries in New York State will be required to meet the minimum standards listed below. Please indicate which of these standards your library already meets as of December 31, 2020. This 2020 data will be helpful in informing statewide and regional efforts to ensure that all of New York's libraries are able to successfully comply with the new minimum standards. Learn more: <http://www.nysl.nysed.gov/libdev/helpful/index.html>

Section 8

- Q8.10-8.13: Annual Total Hours
 - It is understood that this value will be lower than normal as a result of the pandemic. 2020 will be an odd year counting hours open to the public. This will include being open for curbside. While a confusing year, answer this to the best of your ability.
- **Your answer for Q8.13 should match your response to Q9.15.**
- See the FAQ document for advice on open hours questions from NYS:
https://docs.google.com/document/d/1Po9UIN-2w2b2Dc_3c25CX2Jj-dkrhuNAD7SvWqW8n2A/edit#heading=h.kinnw5k5uf1q
- **Q. How should a library count the hours open?**
- A. The federal definition for hours open is used - which is hours that the building is accessible to the public, (regardless of staff access and other service provided.) An outlet is considered physically closed when the public cannot access any library buildings or bookmobiles, regardless of staff access. A building can be physically closed but still offer virtual, Wi-Fi, or "curbside" services outside the building. In that case a library should not count the hours open.
- **Q. Are "lobby services" considered hours open?**
- A. No, although the entry part of the building could be open for contactless service, patrons are not able to use the facility. In that way, Lobby services are considered similar to Curbside services and the hours that a building is accessible for Lobby Services only should not be included in Public Service Hours.

Section 8 *(continued)*

Unless you are CCLD, your library is **the only** public service outlet and **IS** the main branch. Your library has NO OTHER BRANCHES.

- 8.1: This answer should be 1.
- 8.2: This answer should be 0. Your library is the main library; you have no branches.
- 8.3: 0
- 8.4: 0
- 8.5: 1
- 8.7: No branches, so 0
- 8.8: 0
- 8.11: 0
- 8.12: 0

Section 8A - NEW - COVID Questions

- NOTE: This section of the survey (8A) collects data on the impact of the COVID-19 pandemic. Report all information in Part 8A from March 7, 2020 to December 31, 2020.
- Preview questions here:
 - https://www.stls.org/wp-content/uploads/2021/01/FY2020_AnnualReport_COVIDQs_Section8A.pdf
- Most are Y/N questions.
- If a numerical response is required, you may leave it blank this year - if you do not know/have an answer.

Section 9

- Q9.15: HOURS per YEAR.
 - **Take the number of hours you are open each week and multiply that by the number of weeks you are open each year!
 - This should be a number that is larger than 25/35/60 etc.
- Q9.16: WEEKS per year
 - **Use caution and proofread - don't mix these two questions up!**
- Q9.29-9.33:
- If you are connected to STLS/STN Fiber, your answer is: "11 Greater than or equal to 100 mbps and less than 1gbps."
- If you are not on STLS Fiber, to check your download/upload speed, use this link to test your speed from a *wired* computer (not a computer connected to the wifi):
<https://www.spectrum.com/internet/speed-test.html>
- Q9.31: If you are connected to STLS/STN Fiber, select Other.
 - **You must also add a note** that says you are using STLS Fiber.
- 9.33: See the spreadsheet under Section 9:
<https://www.stls.org/annual-report-to-the-state-fy2020/>
- Q9.36: Makerspace - A Makerspace is a space in the library that allows patrons to create in a communal space using technology. This could include 3D printing, photo editing, video and audio recording/editing, animation, coding and programming, digital design, robotics, sewing and more.

Section 10

- Q10.1-10.8: Report information about trustee meetings as of December 31, 2020.
- All public and association libraries are required by Education Law to hold at least **four** meetings a year.
- Q10.9-End of Section 10: List trustees **moving forward. Report your trustees as of February 1st, 2021, not who they were in 2020.**
- Vacant Seats: There must be a record for each voting position. If necessary, include an entry for a VACANT seat.
- Oath of Office: Unless you are an Association Library, your trustees must take an oath of office. New York State Public Officer's Law §10 requires all public library trustees to take an oath of office within 30 days of beginning their term of office.
- Trustee Education: This section was new on the FY2019 report. Create a record for each trustee, and simply answer 'Yes' or 'No' for each. Report as of 12/31/2020. Do not list brand new trustees who are starting their first term in 2021.
- Spreadsheet Option - A template will be available (via a link after Q10.23) with last year's trustee data. The template may be updated with the current year's data and then e-mailed to Baker & Taylor to upload into the library's report. Libraries may also enter the data directly into the report.
- Question 10.16: **Include your trustees' email addresses!**
- Trustee term begin/end – Make sure dates add up to 4 years, if it's a 4 year term. Double check your math!

Section 11

- See step-by-step instructions from STLS here:
https://docs.google.com/document/d/1vIKEgkVlwSaKnOatNmQrBvO3kw_ya8f77TTXRO1lwnU/edit?usp=sharing
- You CANNOT submit if this section does not balance!
- Report financial data based on the fiscal reporting year reported in Part 1.
ROUND TO THE NEAREST DOLLAR.
- Local funding – county, municipality, or district – if multiple municipalities, list each separately.
Use “other” to add a note about a special legislative district.
- This report reflects only money actually received and disbursed by the library under direction of its Board of Trustees, except as noted in Employee Benefits.
- Report amounts actually received and/or disbursed during the fiscal reporting year; do not include accruals for anticipated income and/or disbursements.
- The value of endowments, investment accounts or existing assets **SHOULD NOT** appear on the Financial Report; **report only income from investment deposited into the Operating Fund.**
- Do not estimate receipts and/or expenditures for any item furnished free, such as rent, utilities, or volunteer help.
- Grand Total Receipts must equal Grand Total Disbursements in both the Operating Fund and the Capital Fund
- Question 11.22: Many/most libraries do not have a capital fund. If you have a question about this, contact Erika/Brian.

Section 12

- Q12.42: Plan ahead to have your report done and reviewed by your library board, typically at your February meeting. Your board's approval will be noted in question 12.42.
- Work with your treasure/bookkeeper to answer the questions in this section.
- Items in the section **MUST BALANCE!** You cannot submit if these answers don't balance.

See instructions from STLS here:

https://docs.google.com/document/d/1vIKEgkVlwSaKnOatNmQrBvO3kw_ya8f77TTXRO1lwnU/edit?usp=sharing

Section 13

- Many/most libraries do not have a capital fund.
- If you are unsure of whether you have a capital fund, 1) you probably don't have one, 2) reach out to Erika/Brian for help.
- Part 13 Capital Fund Receipts is to be completed by libraries who have a Capital Fund, who have answered YES to question 12.46.
- You will record your New York State Construction Grant funds in 13.4.

See instructions from STLS here:

https://docs.google.com/document/d/1vIKegkVlwSaKnOatNmQrBvO3kw_ya8f77TTXRO1lwnU/edit?usp=sharing

Section 14

- If you have a capital fund, proceed.
- Capital fund disbursements function like taking money out of a savings account for the building. You have to move money to your checking account in order to use it. Moving that money is a disbursement.

See instructions from STLS here:

https://docs.google.com/document/d/1vIKEgkVlwSaKnOatNmQrBvO3kw_ya8f77TTXRO1lwnU/edit?usp=sharing

Section 15

- THIS SECTION IS **ONLY FOR CCLD!**
 - From the State:
 - Central libraries – report on calendar year, same year as system
 - State will compare to system information
 - Same fund should not be listed in both system and central library reports – only who spent it

Section 16

- Nothing needs to be entered here!

Section 17

- Nothing needs to be entered here!

Suggested Improvements Section

- You must complete the questions in this section!
- If you do not complete this section, the State will ask me to contact you again in a few months, and you'll have to complete it then.

Please complete all fields in Suggested Improvements before you submit!



16. FEDERAL TOTALS

17. FOR NEW YORK STATE LIBRARY
USE ONLY

SUGGESTED IMPROVEMENTS

SAVE. SAVE. SAVE.

- Save every page before you click **Next**.
- Save even if you haven't entered any new information on the page!
- Calculations may not change until you've clicked "SAVE."



Addison Public Library

Survey List FAQ Instructions

Annual Report For Public And Association Libraries - 2018

SHOW STATUS PRINT SUBMIT **SAVE**

Survey Navigation

11. OPERATING FUNDS RECEIPTS : Part 4

SHOW LAST YEAR'S ANSWERS

Help Contact Close

Survey List Instructions

SHOW STATUS PRINT SUBMIT **SAVE**

SHOW LAST YEAR'S ANSWERS

TRANSFERS AND
id 11.25; Same as

FLAG NOTE

PREV NEXT

Submitting!

- Before submitting – PROOFREAD!
 - Make sure there are no blanks
 - Look at your (red) edit checks
 - Look over the notes that you've added and/or be sure to add a note if numbers differ substantially from the previous year.
- You can submit the report at any time. Submitting the report will lock it.
- BUT we can unlock your report anytime, so don't worry if you accidentally hit submit - just email Erika.

**Reports are due to STLS on
Friday, March 5th, 5:00pm.**

