

**Welcome to:
Filing Your State Annual
Report**



January 25, 2008

9:30 a.m.

**Cheryl Becker,
South Central Library System**



What's in it for me?



A funny thing happened on the way to the workshop. . . .



Outline

- Background
- Getting started, and deadlines
- The online form
- The information you need
- Minor changes since last year

Background

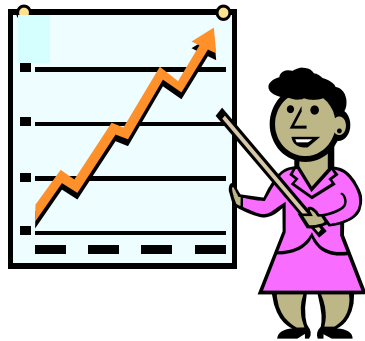
- Required by law
- Wisc. Stats. 43.58 (6)
- Library Board Powers and Duties

Background

What's in it for you?

- USE the data from the report
- Powerful tools to:
 - Report to your board
 - Support budget requests
 - Assist with building/space planning
 - Document library's importance in community

USE the Report!



Background

Consistency

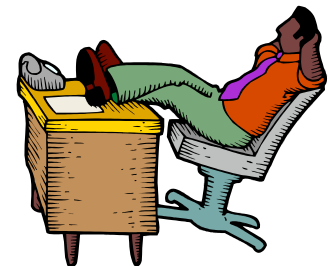
- You can compare:
 - Your library to itself (year to year)
 - Your library to other libraries
- Wisconsin Public Library Statistics
(<http://dpi.wi.gov/pld/dm-lib-stat.html>)
- State data also reported at national level.
(<http://harvester.census.gov/imls/publib.asp>)

Time to Get Started!

- Start early.
- Read everything.
- Follow directions.
- Meet deadlines.
- Questions? Just ASK!



What's in it for you?



Getting Started–And Help

- SCLS Public Library Annual Report page
<http://www.scls.info/management/annual/index.html>
- Contains links to information from:
 - [SCLS](#)
 - [DLTCL](#)
 - LINK [LINK password required]

Getting Started / Help



- Cheryl Becker
 - (608) 246-7973
 - cbecker@scls.lib.wi.us
- Email list (scls-annreport)
 - <http://lists.scls.lib.wi.us/mailman/listinfo/scls-annreport>
- LINK reports (for LINK libraries)
- Each other!



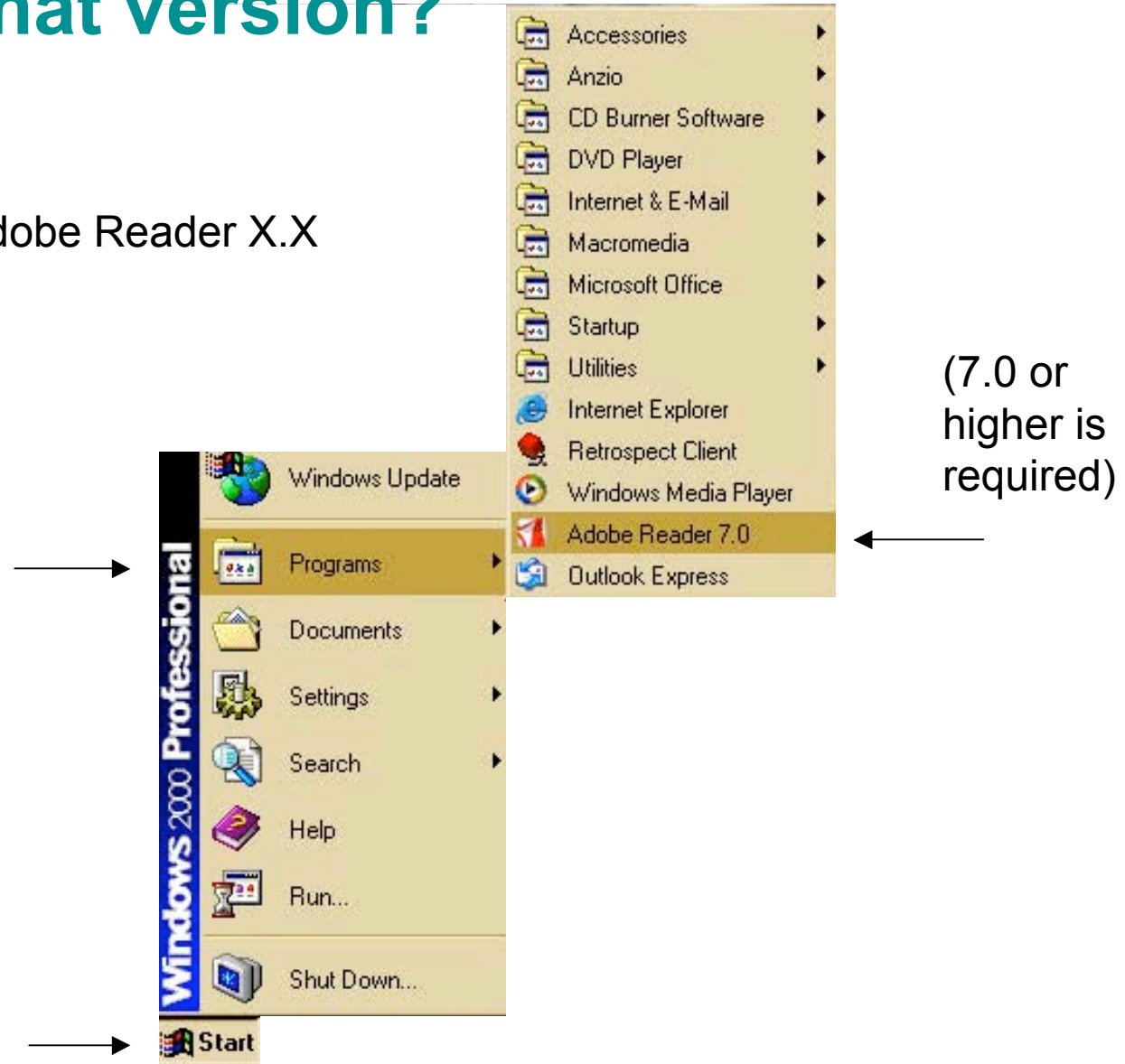
Get off to a Good Start

- Start Now!!
- READ the memos and instructions.
- Do you have Adobe Reader 7.0?
 - Check NOW!
 - If you don't:
 - For LINK workstations, call Automation Help Desk
 - 608-266-6394
- Complete a scratch paper copy.
- Complete the report online.
- Deadlines.



Do you have Adobe Reader? What version?

Start→Programs→Adobe Reader X.X



Deadlines:

- Let me know by **February 15** that your report is ready for me to review.
- 2 printed signed copies due to me by **February 25**. (Other copies also required)



The report is filed online

- Pre-filled information
- Answer *every* question (unless allowed)
- *Pay attention to directions and definitions*
- Save/Return button
- Variances (“edit checks”)
- Comments sections
- When (and when NOT) to “Submit”

http://www3.dpi.wi.gov/FormFinder

The screenshot shows the login page for Form Finder for the Web Enterprise Edition. The page has a blue header with the logo and navigation links. A left sidebar contains a tree view of folders. The main content area has a login prompt, two input fields for user name and password, and a submit button.

Form Finder *for the Web* *Enterprise Edition*

[Latest Info](#) | [Search](#) | [Preferences](#) | [Help](#)

Thursday, January 11, 2007 Please supply your user name and password.

- [-] All Forms
- [-] System Report
- [-] Annual Report
- [-] LSTA Program
- [-] Techplan
- [-] Libraries
- [+] My Forms

User Name:

Password:

Enter User Name and Password.
Click Submit.



Thursday, January 11, 2007

Latest Info

- [-] Cheryl Becker
 - [+] All Forms
 - [+] Annual Report
 - [+] System Report
 - [+] LSTA Program
 - [+] Techplan
 - [+] Libraries
 - [+] My Forms




Click on "Annual Report" to begin.



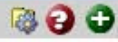
Thursday, January 11, 2007

- Cheryl Becker
 - All Forms
 - Annual Report**
 - System Report
 - LSTA Program
 - Techplan
 - Libraries
 - My Forms

Forms in Folder 'Annual Report'

Form #	Form Name	Agency
 ReportProd	Annual Report 2006	

Displaying (1 - 1) Of 1



Next, click on "Report Prod"







Thursday, January 11, 2007

Enhanced Routing Process Information for ReportProd

- Cheryl Becker
 - All Forms
 - Annual Report**
 - System Report
 - LSTA Program
 - Techplan
 - Libraries
 - My Forms

 [Initiate New Process](#) ←

 [Current](#)  [In Process](#)  [Archived](#)  [Deleted](#)

 [Back](#)

There are no processes in this folder.

“Initiate New Process” to begin.

Once you have entered and saved data, click on
“In Process” to return to your form

- Annual Report
- System Report
- LSTA Program
- Techplan
- Libraries
- My Forms

Process Notes and Messages

[Click to Add Notes](#)

Attachments

[Click to Add Attachments](#)



2006 Annual Report

Please provide the requested information for all 6 sections of this report. You can begin with any section by "skipping" to that section. Each section has several screens. You may enter any or all of the information requested for each section. At the end of each section there is a save/return box. Clicking on that box will save the data you have entered in that section up to that point. After your first save of a section, that section's icon will appear at the bottom of this screen. You may then click on the section icon to directly edit or add data. After all the sections have been completed, you may print your report and submit it to the Division. Begin by clicking on the "Next>>" box below.

Public Library Annual Report



Next >>

(Link to Adobe Reader)

Click Next to begin.

- Techplan
- Libraries
- My Forms



Sec 1 Library, Collection, Services

General Information, Library Collection and Library Services.



Public Library Annual Report

<< Back Skip Sec 1 Fill Sec 1 >>

Click to work on this section.

Or, skip this section.

Ignore this message. Just click on “Close.”


IV. Library Governance

Library Board Members. List the members of the library board as of the date of this report. List the president first. Indicate vacancies. Report changes to the Division for Libraries, Technology, and Community Learning as they occur. When reporting changes, indicate the departing board members.

1.	Name of Board Member				
	City				
2.	Name				
	City				
3.	Name	Street Address			
	City	Zip Code	Email Address		

Cannot Save Form Information

Cannot Save Form Information

 **Please Note:** You cannot save a completed copy of this form on your computer. If you would like a copy for your records, please fill it in and print it.

Don't show again

Close

Screen 1 of 5 Next >

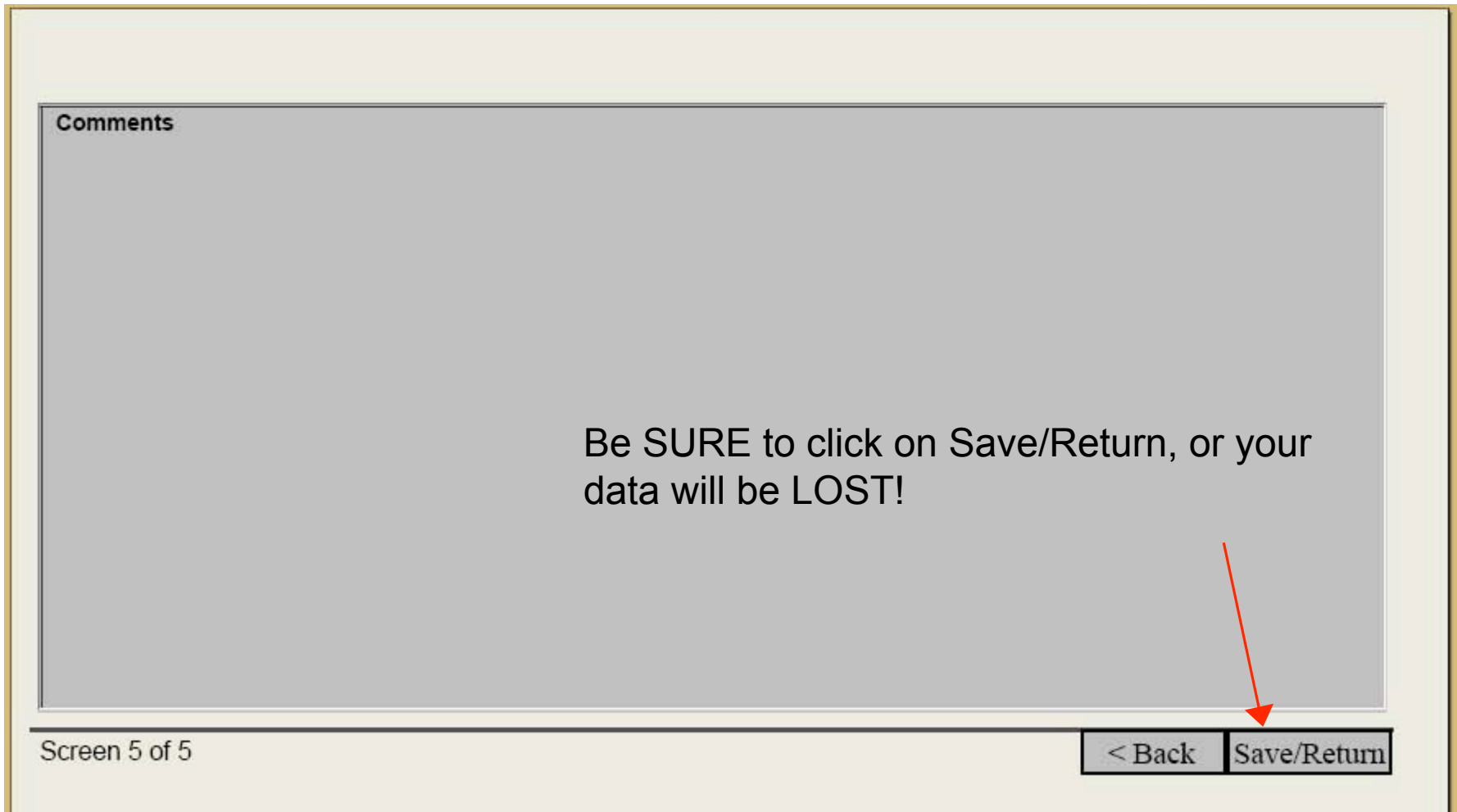
DPI Public Library Annual Report PI-2401

FOR THE YEAR 2007

I. General Information

1. Name of Library Hometown Library		3. Head Librarian First Name Joe		
2. Public Library System		3a. Head Librarian Last Name Smith		
4. Certificate Grade 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/>	4a. Cert. Grade Type <input type="text"/>	5. Cert. Exp. Date	6. Street Address	
6a. Mailing (PO Box #)	7. City / Village / Town	8. County	9. Zip Code + 4	10. Library Telephone No.
11. Fax No.	12. Director's EMail Address			
13. Library Web Address				14. No. of Branches
15. Bookmobiles Owned	16. Other Public Service Outlets	17. Does your library have a Books-by-Mail Program? <input type="checkbox"/> Yes <input type="checkbox"/> No		

Comments can be helpful!



Some questions, especially in Sec. 1, may trigger “edit checks” or variances. You must give an explanation before you can Save and move on.

Explain why Public Service Hours per Week per Location are out of range:

Explain why Reference Transactions per Library Visit are out of range:

Explain why Circulation Transactions per Library Visit are out of range:

Explain why the change in the number of Library Branches since last year is out of range:

Explain why the change in the number of Bookmobiles since last year is out of range:

Explain why the change in the number of Books + Serial Volumes owned since last year is out of range:

Explain why the change in the quantity of Audio Materials since last year is out of range:

EXPLANATION OF VARIANCES

< Back

Next >



Printing and Submitting

After completing this report, please print and save it. When you are ready to submit this report to the Division, click on the “Submit report>>” box found below. This will take you to form submission screen. Clicking on the “Submit >>” box on that screen will electronically submit your data to the division and lock the file. After submitting your data, you will no longer be able to make changes to your form. If for some reason you need to reopen this file, you may contact Alan Zimmerman at (608) 266-3939 or alan.zimmerman@dpi.state.wi.us, at the Division.

[Print Public Library Report](#)

Public Library Annual Report

[<< Back](#)

[Submit Report >>](#)

Clicking on Submit locks your report

Reporting the Information:

- Part I (General Information):
 - You know this stuff.
- Parts II (Collection) and III (Services):
 - Catalog reports
 - LINK reports
 - Records you've kept (programs, etc.)
 - ONLY cataloged items.
 - Note: downloadable audio
 - LINK libraries
 - NOT video

TIP

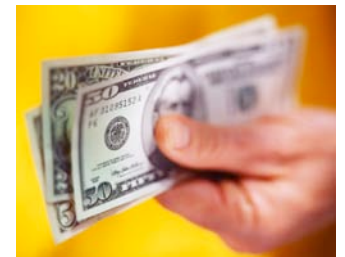
- Be sure to read and follow all instructions.
- If you have don't have some data, be sure to start keeping good records for the future.
- The form changes very little from year to year.

Reporting the Information

- Part IV (Library Board):
 - You know this!
 - Current board members
 - “As of the date of this report.”
 - Include vacancies.
 - #2. Indicate number of board members
(tip: I may ask you about this.)

Reporting the Information:

- Part V: Your 2007 Operating Revenue:
 - Your records
 - Your municipality
 - www.scls.info/management/annual/memo.html has info about state funds, etc. paid to you
 - ***Pay special attention to:***
 - Funds carried forward (6)
 - All other operating income (7)
 - **2008 LOCAL appropriation (9)**
(tip: I may ask you about these)



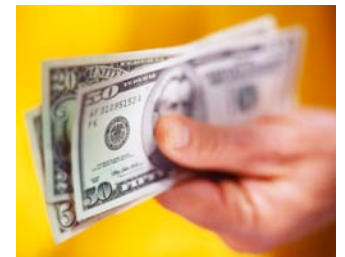
V. LIBRARY OPERATING REVENUE

Report operating income only. Do not report capital receipts here.

6. Funds Carried Forward (Do not include state aid. Report state funds in 3b. above)	7. All Other Operating Income	8. Total Operating Income (Add 1 through 7)	9. What is the 2008 annual appropriation provided by your governing body for your public library?	10. Did your library's muni- cipality exempt itself from the county library tax for 2007 (Wis. Stat- ute. s.43.64 (2))?
				<input type="checkbox"/> Yes <input type="checkbox"/> No

Reporting the Information:

- How you spent funds in 2007
- Part VI (Operating Expenses)
- Part VII (***Capital*** Income and Expenses)
- Where to find:
 - Your records
 - Your municipality
 - www.scls.info/management/annual/memo.html
 - Pay attention to the definitions!
- # 7 of Part VI is *important*



VI. LIBRARY OPERATING EXPENDITURES
Report Operating Expenditures From All Expenditures. Do not Report Capital Expenditures Here.

1. Salaries and Wages. Include maintenance, security, plant operations

2. Employee Benefits. Include maintenance, security, plant operations.

3. Library Collection Expenditures

a. Print Material	b. Electronic Material	c. Audiovisual Materials	d. All Other Library Materials	Subtotal 3

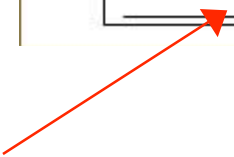
4. Contracts for Services from Other Libraries (Include contracts with other libraries, municipalities and systems here. *Indicate Service Provider.*)

Provider	Amount	Provider	Amount
Subtotal 4			

5. Other Operating Expenditures

6. Total Operating Expenditures (Add 1 through 5)

7. Of the expenditures reported on line 6, what were operating expenditures from federal sources?



Reporting (Still More!) Information

- Part IX (Staff):
 - As of the last day of 2007.
 - Include vacancies.
 - Read the directions.
- Part X (“Other Funds”):
 - Enter total other funds held by library
 - Attach a report of activity
 - Funds in SCLS “holding accounts” included here



Still Reporting Information

- Part XI (Loans to Nonresidents):
 - Circulation records
 - Circ by PSTAT reports (for LINK libraries)
- Circ to people *outside* your municipality.

What's in it for you?

Payments from your county and adjacent counties



Reporting the (last) Information

- Part XII (Technology and Youth Services):
 - You should know this.
- Part XIII (Special Needs):
 - This is NEW. Check the boxes that apply.
- Part XIV(Assurance of Compliance):
 - Important for System membership.
 - Be careful and honest.
- Part XV (Signatures and date):
 - Board must sign approve and sign.
 - *Timeline may require a special or rescheduled board meeting?*

Changes from Last Year

- Section I (General Information):
 - #22. New or remodeled building in 2007?
- Section III (Services):
 - #7. Locally licensed databases–Sessions.
(Most of you don't have these)
- Section XIII. (Special Needs):
 - Entire section is new. Check all that apply.

Recap

- **R**ead
- **E**verything
- **W**hat info do you need?
- **A**sk questions
- **R**emember: Board approval, signatures, copies to SCLS
- **D**eadlines

REWARD

What's in it for You? (REWARDS)

- **R**eality (The numbers don't lie)
- **E**quity (consistency– library to library, year to year)
- **W**ithin the Law
 - Required by statute
 - Certify compliance with system membership
- **A**dvocacy (Use the data!)
- **R**elax (after you're done)
- **D**ocumentation (of performance)
- **S**tatistics

Questions?



Cheryl Becker

608-246-7973

cbecker@scls.lib.wi.us

IM: sclscheryl

