

## Annual Report for Public and Association Libraries 2023 Outline of Major Changes

### Important

- The State Library due date of the annual reports will be March 1, 2024.
- 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 may cause data to be lost.
- Libraries should not have reports from two different years open at the same time.
- All libraries will continue to use the [Baker & Taylor interface](#) to enter their 2023 data.

### Other Notes

- From March through June of 2023, a joint NYSL and PULISDO committee worked together to review annual report questions and provide recommendations to the State Librarian on how the annual report could be improved, streamlined, or simplified. We are deeply appreciative of everyone's input and have done our best to implement the requests and suggestions made.
- There will be some amount of re-numbering due to questions added, removed, or re-ordered since the 2023 Annual Report. Not all instances of re-numbering are noted in this outline.
- All COVID-19 questions have been removed from the report.
- Please see updates in Instructions and note the rewording in questions and Instructions. Not all changes are noted in this outline.
- Instructions intended for more than one question are marked as such.
- On the Edit Check Review page, when an Edit Check is resolved with a note, the red exclamation point becomes a large green check mark. Note that All Edit Checks must have green check marks before the report can be submitted.

### Tips and Tools

- Auto-save is now enabled, but it is recommended to save often to ensure data retention. The Save button is located at the top and bottom of each page. (On some pages, you may have to scroll down.)
- To print the report with page numbers, click on the Printer icon in the menu at the top of the page, go to "Show Web Report" and then Control-P for Print.

## 2023 Changes to Part 3: Library Programs, Policies, and Services

### Renamed and Restructured Sections

- Program sections have been restructured and renamed Library Sponsored Programs, Teen Led / Promotion / Summer Reading, Early Literacy, Adult Literacy, and ESOL / Digital Literacy. Summer Reading, Early Literacy, Adult Literacy, ESOL, and Digital Literacy are now if/then sections only requiring subsequent answers if *Yes* is entered. If *No* is answered the rest of the questions in that section will disappear.

### Restructured Questions

- Q3.4 – 3.10 Written Policies. These questions will be pre-filled with prior year answers but not locked to allow changes if needed.
- Q3.14 Accessibility. This is now an if/then question only requiring subsequent answers if *Yes* is entered.
- Q3.17-3.32 Program Questions. These have been significantly restructured to better match library data capturing, with four new subsections: Live Programs Categorized by Age, Live Programs Categorized by Venue, and Prerecorded and One-on-One Programs. Additionally, *Synchronous* has been changed to *Live* and *Asynchronous* has been changed to *Prerecorded*.
- Q3.33 Did your library offer teen-led activities during the 2023 calendar year? This was previously asked toward the end of this section and has been moved to be before the Summer Reading section.

## 2023 Changes to Part 6: Staff Information

- Q6.6 and Q6.7 Previous questions relating to *Librarian (certified)*. These now simply state *Librarian*, with revised definition of “Librarians with master’s degrees from programs of library and information studies accredited by the American Library Association.”
- Q6.18 and Q6.19 Previous questions relating to *Entry Level Librarian (certified)*. These now simply state *Librarian*.

## 2023 Changes to Part 9: Service Outlet Information

- Most fields will be pre-filled with prior year answers but not locked to allow changes if needed.

## **2023 Changes to Part 10: Officers and Trustees**

- Range and term questions have been simplified and are pre-filled (not locked). Board President section has been removed and will now be entered as a repeating group along with the other trustees. Please make sure to check for needed changes, especially regarding officer positions and dates.
- Trustee education is now a single question attestation, and it has been moved to the first section as Question 10.6. Libraries must attest that all trustees have completed their legally required annual education or explain why not in a note.

## **2023 Changes to Part 12: Operating Fund Disbursements**

- Q12.20 Postage and Freight. This question has been deleted; please enter this information in Q12.23 Other Miscellaneous expenses.

## Tips for Reporting Live Programs (Synchronous) Programs in Part 3

### Include

- All program sessions that are sponsored or cosponsored by the library. For a program session to be sponsored or co-sponsored by the library, the library must contribute financial resources or staff time toward the program session. For a program session that is part of a larger community event (such as a farmers' market or festival), it is not necessary for the library to also sponsor or organize the larger event.
- Examples of live programs include live story hours, film or movie showings, puppet shows, lectures, or concerts.
- Both in-person on-site and in-person off-site program sessions. For example, include a story time at a farmers' market or a presentation to a school group about library resources conducted at a school.
- Live-streamed virtual program sessions that are sponsored or co-sponsored by the library.
- Program sessions with attendance of zero or one if they were intended for a group.

### Exclude

- Program sessions sponsored by other groups that use library facilities. For example, do not include a homeschooling group hosting a speaker in a meeting room without facilitation from library staff.
- Offsite outreach efforts that do not otherwise meet the definition of a program session. For example, do not include having a library card signup booth at a farmers' market.
- Prerecorded (previously called asynchronous) presentations of program content. For example, exclude any recording of program content (such as a prerecorded story time) that cannot be viewed live as it unfolds. These should be counted in Total Number of Prerecorded Program Presentations (Q3.29).
- Programming that is shared on the library's website or social media that is not sponsored or cosponsored by the library. For example, do not include sharing a video from an author's website of them reading a book.
- Activities delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.
- Passive or self-directed activities that do not occur at a scheduled time. For example, do not include leaving an art project or puzzle on a table for participants to complete. Activities differ from programs in that 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.
- Take and Make kits that are not part of a synchronous program such as a story hour. Report Take and Make kits that are left out for patrons to pick up under Q3.31, One-on-One Program Sessions, and Q3.32 One-on-One Program Attendance. Count each kit prepared as one session, and each kit picked up as one attendee.