

# Wisconsin Public Library Annual Report Instructions 2022

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Wisconsin Department of Public Instruction



Dr. Jill Underly,  
State Superintendent, Wisconsin

Division for Libraries and Technology  
Wisconsin Department of Public Instruction  
125 South Webster Street  
Madison, WI 53703

<https://dpi.wi.gov/libraries/public-libraries/data-reporting/annual-report>

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# Introduction

## COVID-19 Impact on Library Statistics


The COVID-19 pandemic has continued to affect the services public libraries offer to our communities. As you complete the 2022 Wisconsin Public Library Annual Report, keep in mind that public libraries everywhere are continuing to report changes in reporting metrics like circulations, computer use, programs and attendance, staffing, and others. These changes in reported numbers are part of a larger story as we study the impacts current and ongoing. Wisconsin public libraries increased electronic material offerings, provided virtual programs and educational content, connected their communities to government, health, and job-seeking resources, enhanced digital networks to provide improved internet access, and learned how to provide many other new services quickly and reliably as a steady force in the community.

The numbers reported in the 2022 Wisconsin Public Library Annual Report should be accompanied with stories of library and staff resilience and ingenuity, accommodations made to be able to provide necessary services to your community, and the impact you have had on your library users.

## Reporting Library Activities for 2022

The Wisconsin Public Library Annual Report is intended to provide a general description of your library and the services it provides to library users during the 2022 calendar year (report year). Library boards are required to file reports with the Wisconsin Department of Public Instruction's (DPI's) Division for Libraries and Technology (DLT) and the libraries' municipal governing body within 60 days of the conclusion of the fiscal year, under [Wis. Stat. 43.58 \(6\) \(a\)](#). The report must be completed and filed by **March 1, 2023**. The information supplied by public libraries and public library systems is published online on the [Wisconsin Public Library Service Data](#) page. Selected data elements are cooperatively shared with the Institute of Library and Museum Services (IMLS) to add to a national database of public library information as part of the national [Public Libraries Survey \(PLS\)](#).

For additional information and resources, including changes and the supporting data entry worksheet, see instructions and documentation on the [Public Library Annual Report Instructions and Forms page](#).

Some data for each library is pre-filled in the Annual Report by the Division for Libraries and Technology and the public library systems. Please review this information carefully and change only those items that are not correct. It is recommended that users add annotations when changing prefill data. To add an explanation or comment about an entry while completing the report, each item has a notes icon (  ) for entering that information. All notes are displayed at the end of the annual report form generated by the Library Performance Assessment Solution (LibPAS) reporting tool.

In other cases, last year's data is displayed to the right of the data entry field for reference only. When prior year data is displayed, the user must still enter data into the blank field for the current report year.

If clarification or other assistance is needed to complete the report, contact your library system headquarters or email the Division for Libraries and Technology at [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov).

## Locking and Approving the Annual Report

When the Annual Report is complete and you are confident that no further changes are required, click the Submit/Lock button at the top right of the form. Click Print at the top right of the data entry page in the green header bar then click Template in the Print Form dialog box to generate a PDF copy of the annual report that can be printed or saved to your computer. You can use the Print button at any time to generate the form, but before you submit/lock the form, the report will bear a draft watermark. Once submitted/locked, the report may be printed without the watermark so that the library director and library board president or other board-authorized officer may sign it.

The screenshot displays the top navigation bar with buttons for Home, Menu, Help, and Logout. Below this is a green header bar with Reports, Prompts, and Print. A 'Print Form' dialog box is open, showing Template, Screen, and Cancel buttons. At the bottom, there is a 'Period' dropdown set to 2019, a Verify button, and a Submit/Lock button.

If a locked report must be edited, contact your system headquarters to request that the report be unlocked. You may also call the State Data Coordinator at (608) 267-0376 or email [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov) to unlock the report.

Inform your library system when the form is completed so that they may review the content; your system may ask you to have them review the form before you lock it for your library board. When your board has approved the report, let your system know that the form may be approved. Send two original, signed copies to your library system headquarters. Check with your system to see if they allow electronic submission. The system will forward an electronic copy to the Division for Libraries and Technology and file one at the system office. The library should retain a copy in its permanent records. [Wis. Stat. 43.58 \(6\)](#) also requires the library board to submit a copy with the municipality.

The Division for Libraries will only accept electronic versions of the signed PI-2401 Public Annual Report form as signed, scanned PDFs or equivalent. Physical records sent to the system must be submitted from the system to the Division for Libraries and Technology in PDF format or equivalent. Check with your system to see if the system will accept a signed, scanned PDF rather than the physical, signed originals. Electronic records are authorized by [Wis. Stat. 137.15](#) and necessary as Division staff do not have immediate access to physically submitted copies.

## Section I. General Information

The General Information section requests basic information about the library's public service outlets. Some fields are pre-filled with last year's information. In other cases, last year's response is displayed to the right of the data entry field. Please revise as needed.

### 1. Name of Library

The current, complete legal name is displayed. Do not change or edit the name unless the library board changed the legal name of the library during the report year. Any changes require an explanatory annotation (📝). If the legal name is incorrect but did not change during the reporting year, contact [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov).

### 2. Public Library System

The library's system affiliation for the report year is displayed and locked. If the library system affiliation is not correct, please email [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov).

### 3a. Salutation

Choose a salutation from the dropdown that is used by the Division for Libraries and Technology for correspondence.

### 3b. Head Librarian First Name

Enter the first name of the current head librarian / director. (The name on last year's report may be prefilled.) If the director's position is vacant, enter "Vacant." Add a note (📝) indicating how long the position has been vacant and when the board expects to hire a replacement. In the case of an interim director, enter that person's first name, but indicate in the notes that the appointment is temporary and when a new director will be hired.

### 3c. Head Librarian Last Name

Enter the last name of the current head librarian / director. If the position is vacant, enter "Vacant".

### 4a. Certification Grade

Use the dropdown list to indicate the certification grade (Grade 1, Grade 2, or Grade 3) of the head librarian / director. Last year's response is displayed. If the position is vacant or the director has not yet applied for certification, select "N/A."

### 4b. Certification Type

Select the certification grade type (regular, temporary, provisional, or permanent) of the head librarian / director. The response from last year's report is displayed. Select "pending" if the director is eligible and is in the process of applying for certification or "Vacant" if the director's position has not been filled.

### 5. Certification Expiration Date

Enter the date that certification of the head librarian/director will expire. All certifications expire on the last day of the month, e.g., certification through May 2022 expires May 31, 2022 (entered as 5/31/2022). Dates must be entered in MM/DD/YYYY format. Leave blank only for the "permanent" certification grade type.

### 6a. Street Address

Enter the complete street address of the main library. This should be the location where the principal collections are kept. The current address is displayed. Do not make any changes or edits unless the location of the library has changed during the report year, in which case you must also provide an explanation in the notes (📝) for the address field. Use standard postal abbreviations, such as "St." instead of "Street" and "W." instead of "West."

### 6b. Mailing Address or PO Box

Enter the mailing address. Unless the library has a PO Box or Rural Route number for postal delivery, this is often the same as the street address. The information has been prefilled; please check and correct only if necessary.

### 7. City / Village / Town

Enter the name of the municipality in which the library is located. In some cases, this will be the community with the nearest post office.


#### 8. ZIP Code

The library's five-digit postal ZIP code and four-digit ZIP code extension reported last year are prefilled. If the library's mailing address has changed, verify the current ZIP code.

#### 9. County

The library's home county or, for libraries in more than one county, the county affiliation used for library system membership is displayed and locked. If the library's county is inaccurate, please contact [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov).

#### 10. Library Phone Number

Provide the main phone number of the library, including area code. The phone number must be entered into the preset format. The form will not accept extensions; if required, put extensions in the notes (  ).

#### 11. Fax Number

Provide the fax number for the library, including area code. If there is no library fax number, leave this field blank.

#### 12. Library E-mail Address of Director

Enter the director's email address. If the director does not have an individualized email address, use the general email address for the library.

#### 13. Library Website URL

If the library has a website, provide the URL. If the library does not have its own website but has a webpage on a municipality or library system website, enter the URL of that page; otherwise, leave blank. Do not enter a social media site URL. Do not include "http://".

#### 14. Number of Branches

Provide the number of library branches. A branch is a library auxiliary unit of the main library which has all of the following:


- separate quarters;
- an organized collection of library materials;
- paid staff; and
- regular scheduled hours for being open to the public.

Branches are administered from the central library. Last year's data is displayed. Most Wisconsin libraries have only their main location and no branches. If your library has branches, complete the information for each branch in Section Ib. Outlet Information.

#### 15. Number of Bookmobiles Owned

Provide the number of bookmobiles in use. A bookmobile is a traveling branch library. At minimum, a bookmobile consists of all of the following:

- a truck or van that carries an organized collection of library materials;
- paid staff; and
- regularly scheduled hours (bookmobile stops) for being open to the public.

Last year's data is displayed. Any change requires explanation in the notes (  ). Libraries with branches or bookmobiles must also enter bookmobile data in Section Ib. Outlet Information.

#### 16. Number of Other Public Service Outlets

Other public service outlets are locations to which library materials are delivered for availability, but either they have no permanent collection or no formal circulation to individuals is conducted by library staff. Do not report



bookmobile stops. Include collections in preschools, nursing homes, jails, etc. Enter the total number of other regular public service outlet locations (not individual drop-offs).

#### 17. Books-by-Mail Program

Indicate whether your library operates a books-by-mail program.

#### 18. Legally Established Joint Library

A public library may be legally organized as a joint public library, which means the library was created by a formal agreement between two or more municipalities or by a county and one or more municipalities in whole or in part in the county. Indicate whether this library is a joint library established under Wis. Stat. 43.53.

***Hours of Operation 19a. through 19f. are displayed after item 22 in the online reporting portal.***

#### 19. Annual Public Service Hours

Report the number of hours opened per week and the number of weeks operating in a modified Hours of Operation table. The table includes three different service levels to report hours opened with no restrictions on building access, limited public access, and staff only access to the building. These service levels are defined below. The standard breakout of “winter hours” and “summer hours” still applies. Libraries with branch locations will complete this breakout for the central library in Section I Item 19 and each branch location in Section Ib.

Values entered for 19a-d are used to calculate the number of weeks operating at each service level and the number of hours operating during the calendar year. Those values are calculated as 19e Total Weeks (not displayed) and 19f Total Hours.

Note that while the library may not have exact statistics on service hours with this breakout by service level, it is important to make an educated estimate of the approximate number of hours open and the number of weeks the library building was operating at each service level. Library locations should have an approximate timeline of what services were provided in the library building during the 2022 and can use that information to extrapolate an estimated number of service hours and weeks. When the number of hours fluctuate from week to week for a service level, use an average number of hours that when multiplied by the number of weeks operating at that service level will provide an accurate estimate of the total number hours operating

“Standard Service with No Restrictions on Building Access” means when the library was operating without limitations on public access to the building. Do not include any hours or weeks when the library metered access or barred access to the building to allow for social distancing or to follow state or local health orders or guidelines. Libraries that were closed for reasons other than the COVID-19 pandemic should report reduced hours or weeks in the “Standard Service” category rather than the “Staff Only” category to properly capture the effect of the pandemic.

“Limited Building Access for the Public” means when the library implemented limited public occupancy practices as a response to the pandemic. Limited building access can include reduced hours open, limits on the number of public members allowed to enter the building, appointment only onsite library use, visitor time limits, closed stacks or meeting rooms. Do not include times when the public could not enter the building or could not pass beyond a porch, vestibule, or breezeway to pick up materials.

“Staff Only - No Interior Service for the Public” means when a library or branch is physically closed and the public cannot access any library buildings or bookmobiles, regardless of staff access. A building may be physically closed while still offering virtual, Wi-Fi, curbside, drive-thru, and other services outside the building.

#### 19a. Winter Hours Open per Week

Enter the library's winter hours open per week at each service level (i.e., standard service, limited building access, no interior service). If the library had the same schedule all year at varying service levels, enter the number of hours that the library was open at each service level as Winter Hours. If estimating the number of hours per week at each service level, please report using Winter Hours.

#### 19b. Number of Winter Weeks

Enter the library's number of winter weeks at each service level (i.e., standard service, limited building access, no interior service). If the library had the same schedule all year at varying service levels, enter the number of weeks that the library was open at each service level as Winter Weeks. If estimating the number of hours per week at each service level, please report using Winter Weeks.


#### 19c. Summer Hours Open per Week

Enter the library's summer hours open per week at each service level (i.e., standard service, limited building access, no interior service). If the library had no change in hours or is reporting an estimate of the number of hours using the Winter Hours, leave Summer Hours blank.

#### 19d. Number of Summer Weeks

Enter the library's number of summer weeks at each service level (i.e., standard service, limited building access, no interior service). If the library had no change in hours per week or is reporting an estimate of the number of hours per week using the Winter Weeks, leave Summer Weeks blank.

#### 20. Square Footage of Public Library

Report the square footage of the main public library. Enter the area, in square feet, of the main public library building. (Square footage of branches is entered in Section 1b.) Square footage is the area on all floors enclosed by the outer walls of the library. Include all areas occupied by the library, including those areas off-limits to the public. Include any area shared with another agency or agencies if the library has use of that area. The square footage from last year's report is prefilled. If you change that number, you will be required to provide an explanation of the change in the notes (  ).

#### **UPDATED DEFINITION** 21. Library or Branch Move or Expansion

21a. Indicate whether the library or one of its branches moved to a new facility in the report year.

21b. Indicate whether library or a branch renovated or expanded an existing facility during the report year.

#### **UPDATED DEFINITION** 22. UEI Number

This field is optional. If your library has a Unique Entity Identifier (UEI) number on file with the Division for Libraries and Technology, the field will be prefilled. [UEI numbers](#) are required to receive federal assistance such as LSTA grants. UEI number replaced the DUNS number in 2022.

## Section COVID-19

A series of questions were added to the federal Public Libraries Survey in the summer of 2020 in order to understand the COVID-19 pandemic's impact on libraries. These questions have been reduced in 2022. The Wisconsin specific subset of questions is removed.

## **NEW** COVID-19 IMLS Survey

Select Yes or No for each of the following items. Respond once in this section for the main and all outlets.

### 510 Closed Outlets Due to COVID-19

Were any of the library's outlets physically closed to the public for any period of time during 2022 due to the Coronavirus (COVID-19) pandemic? 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.

### 511 Public Services During COVID-19

Did library staff continue to provide services to the public during any portion of 2022 when the building was physically closed to the public due to the Coronavirus (COVID-19) pandemic? Include regardless of the location of library staff when they provided services (i.e., working from home or in the building that was closed to the public).

### 514 Electronic Library Cards Issued During COVID- 19

Did the library allow users to complete registration for library cards online without having to come to the library during 2022 due to the Coronavirus (COVID-19) pandemic?

### 515 Reference Service During COVID-19

Did the library provide reference service via the Internet or telephone when the building was physically closed to the public during 2022 due to the Coronavirus (COVID-19) pandemic? Include references service provided via email, chat, and text.

### 516 Outside Service During COVID-19

Did the library provide 'outside' service for circulation of physical materials at one or more outlets during 2022 due to the Coronavirus (COVID-19) pandemic? Includes any contactless or minimal contact provision of circulation items. Similar terms could include curbside, vestibule, or porch pickups, delivery (mail or drop-off), drive-thru, etc.

### 520 External WiFi Access Added During COVID- 19

Did the library intentionally provide Wi-Fi Internet access to users outside the building at one or more outlets during 2022 due to the Coronavirus (COVID-19) pandemic? Includes "parking lot access," bookmobiles or other mobile facilities with Wi-Fi capabilities.

### 521 External WiFi Access Increased During COVID-19

Did the library increase access to Wi-Fi Internet access to users outside the building at one or more outlets during 2022 due to the Coronavirus (COVID-19) pandemic? Increasing access could mean removing restrictions on sign-in authorizations, expanding router reach, leaving Wi-Fi service on 24 hours, installing or moving access points to promote or improve external access, etc.

### 522 Staff Re-Assigned During COVID-19

Did library staff work for other government agencies or nonprofit organizations instead of, or in addition to, their normal duties during the Coronavirus (COVID-19) pandemic? Include reassignments to other government agencies (e.g., to process unemployment claims), as well as other activities such as the use of library staff to distribute school lunches and other materials. Volunteering during work hours would count but volunteering off hours would not.

**COVID-19 Closures** (NOTE: libraries with multiple outlets will report this information for each branch location in the Outlet Information section)

Initial date closed due to COVID-19

Select or enter the first date the library closed due to COVID-19.

First date reopened following initial COVID-19 closure

Select or enter the first date the library reopened to the public for limited or full service – whichever date was earlier. If the library building still does not allow public access to the building, check the box that says “Building still not open for public access.”

Additional building closure and reopening dates, please describe

Use this narrative field to provide information regarding additional building closures and reopening dates if the library building had to close again following a re-opening due to COVID-19. The library may also use this field to provide additional details about library service during the pandemic as desired.

## Section Ib. Outlet Information

Most libraries will not see any entry fields in this section. However, you may see section headers listed due to reporting changes. If your library has a bookmobile or branches, complete this section. Note that the main library will also be listed. Changes made to information for the main library in Section I must also be entered in this section, such as weeks open and hours per week.

General Information

Confirm or correct the general information listed for each outlet: main library, branches, and bookmobiles:

- Name of Library
- Legal Name of Branch
- Branch Head Salutation, First and Last Name
- Branch Email


Address Information

Correct or enter street and mailing address information only as necessary:

- Branch Street Address
- Mailing Address (or PO Box)
- City/Village/Town
- ZIP code and 4-digit ZIP code extension
- County


Branch Information

Confirm or enter the phone number and square footage for the main library and each outlet.

Square footage is the area on all floors enclosed by the outer walls of the library. Include all areas occupied by the library, including those areas off-limits to the public. Include any area shared with another agency or agencies if the library has use of that area. The square footage from last year’s report is prefilled. If you change that number, you will be required to provide an explanation of the change in the notes (  ). For bookmobiles, enter the value “-3” in both fields (Branch Phone Number and Square Footage of Branch).

## Hours of Operation

Confirm or enter the number of winter and summer weeks and hours per week that each outlet (main library and each branch or bookmobile) is open. Refer to the instructions in Section I. General Information question 19 for more information.

If an outlet was closed for a week or more during the year (for instance, if it was closed for flooding, moving, or a branch or bookmobile is routinely closed for part of the year) be sure to deduct the closed weeks here even if staff are scheduled to work and provide a note (  ) describing the reason for the closure. Minor fluctuations in hours of operation, such as holiday hours, do not need to be incorporated in the hours reported. For bookmobiles, count the hours the bookmobile is open to the public, but do not include travel time between stops. Do not include hours for deposit collections or other similar service outlets.

# Section II. Library Collection

This section of the report collects data about selected types of materials. It does not cover all types of material. Libraries may include other materials owned in item 7 of this section. 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. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where the item is available for their use.

Physical units are volumes, items, or pieces. Items that are packaged together as a unit and are generally checked out as a unit should be reported as *one* physical unit; e.g., two music CDs, several audio CDs for one recorded book, or two DVDs.

**Resource.** Use the [Use of Digital Resources and Library Collection flowchart](#) to help determine whether electronic materials are counted as an “Electronic Collection” or if the units are counted toward your library’s collection as e-books, e-audio, and e-video.

## 1. Books in Print

Books are non-periodical printed publications (including music and maps) that are bound in hard or soft covers, or in loose-leaf format. Include non-serial government documents. Report the number of physical units, including duplicates. Note: since 2011, "serial back-files in print" are no longer reported.

Report a single figure for 1a. that is the sum of the number of books in print held at the end of the year. Report in 1b. the number of books in print added during the year.

## 2. Electronic Books

Electronic books (e-books) are digital documents (including those digitized by the library), licensed or not, where searchable text is prevalent, and which can be seen in analogy to a printed book (monograph). E-books are loaned to users on portable devices (e-book readers and devices with e-reader apps) or by transmitting the contents to the user’s personal computer for a limited time. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired.

Report the number of electronic units (copies), including duplicates, for all outlets. E-books packaged together as a unit, such as multiple titles on a single e-book reader, and checked out as a unit are counted as one unit. Do not include items freely available without monetary exchange. Do not include items that the user permanently retains.

Report only items the library has selected as part of the collection. This includes OverDrive titles (titles that are available as part of a unit made available through a purchase, license, or lease). Only count titles available through Hoopla (a pay-per-use service) if the title is circulated. If licensed by the regional system, use the year-end total provided by the system. If the field is prefilled, your library system provided the data for the total number of units available to your library. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

### 3. Audio Materials

Audio materials are materials on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically or electronically or both. Included are records, audiocassettes, audio discs (including audio CDs), talking books (whether on cassette, CD, or DVD), Playaways, and other sound recordings. The Division for Libraries and Technology interprets the definition of audio materials provided by IMLS (“a fixed, physical format on which sounds (only) are stored”) to exclude mixed media print/audio as audio materials. Items such as Wonderbooks that are full print materials supplemented with a playable audiobook should be counted as a print material under 1. Books in Print.

Report in 3a the number of physical units, including duplicates, of audio materials held at the end of the year. Report in 3b the number of audio materials added during the year.

### 4. Electronic Audio Materials

Electronic audio materials (e-audio) are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced (played back) electronically. E-audio units (copies) may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include e-audio held locally and remote e-audio for which permanent or temporary access rights have been acquired.

Report the number of e-audio units, including duplicates, that the library has selected as part of the collection. A unit is a copy of a title, either leased or owned, that the library has selected and made available. Include sound recordings such as web-based or downloadable audiobooks and MP3 files. This includes OverDrive titles (titles that are available as part of a unit made available through a purchase, license, or lease) made available by your system. Titles available through Hoopla (a pay-per-use service) should be counted only if circulated. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the user. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

If the field is prefilled, your library system provided the data for the total number of units available to your library. If not, obtain an end-of-year total from your system.

### 5. Video Materials

Video materials are materials on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sounds, using a television receiver or monitor. Video formats may include tape, DVD, Blu-ray, etc.

Enter in 5a the number of physical units, including duplicates, of video materials held at the end of the year. Report in 5b the number of video materials added during the year.

### 6. Electronic Video Materials

Electronic Video Materials (e-video) are downloadable electronic files on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver, computer monitor or video-enabled mobile device. E-video units (copies) may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include e-video held locally and remote e-video for which permanent or temporary access rights have been acquired.

Report the number of e-video units that the library has selected as part of the collection. A unit is a copy of a title, either leased or owned, that the library has selected and made available. Electronic unit formats may include web-based or downloadable files, etc. If your library system licenses OverDrive videos (titles that are available as part of a unit made available through a purchase, license, or lease), include their total. Only count titles available through Hoopla (a pay-per-use service) if the title is circulated. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the user. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

If the field is prefilled, your library system provided the data for the total number of units available to your library. If not, obtain an end-of-year total from your system.

## **UPDATED DEFINITION** 7. Other Materials Owned

**Required for 2022:** This item corresponds with Section III 1c. Circulation of Other Physical Items. 1c was a new data element added by IMLS in 2021 to the annual report which is required for 2022.

Describe and report the number of physical units held at the end of the year in any special collection(s) of other materials owned not otherwise reported that the library would like to report. This includes all physical items other than print books, physical audio units, physical video units, and serials, including renewals. These are materials in a fixed, physical format for use outside the library. These can include a variety of items such as wi-fi hotspots, sewing machines, cake pans, tools, board games, etc.

Report in 7a the number of other materials held at the end of the year. Report in 7b a description of these other materials.

## 8. Electronic Collections

An electronic collection is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts, photographs, music, video, etc.) with a common user interface and software for the retrieval and use of the data. An electronic collection may be organized, curated, and electronically shared by the library, or rights may be provided by a third party vendor. An electronic collection may be funded by the library, provided through your system or cooperative agreement with other libraries, or provided by the Division for Libraries and Technology. Do not include electronic collections that are provided by third parties and freely linked to on the web.

Electronic Collections do not have a circulation period and may be retained by the user. Remote access to the collection may or may not require authentication. Unit records may or may not be included in the library's catalog; the library may or may not select individual titles. Include electronic collections that are available online or are locally hosted in the library.

Note: The data or records are usually collected with a particular intent and relate to a defined topic. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

### 8a. Electronic Collections (Locally owned or leased)

Report the number of electronic collections owned or leased by the library.

### 8b. Other Electronic Collections (purchased by library system or consortia)

Report the number of electronic collections purchased or leased by the system or consortia and made available to member libraries of the system. This field may be prefilled with data provided to the Division for Libraries and Technology by your library system.

#### 8c. Statewide Electronic Collections (provided through BadgerLink)

Report the number of electronic collections provided through BadgerLink by the Division for Libraries and Technology. This field may be prefilled with data provided by the Division for Libraries and Technology.

#### 9. Total Electronic Collections (local, system, and statewide)

The total number of electronic collections is the sum of items 8a. through 8c. and is automatically calculated and displayed.

#### 10. Subscriptions

Subscription refers to the arrangement by which, in return for a sum paid in advance, serials are provided for a specified number of issues. These are print subscriptions only, not electronic or digital subscriptions. Examples of serials are periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series.

Report the total number of current print serial subscriptions, including duplicates. Count subscriptions purchased using the library's budget. Only count those subscriptions that are paid for and donated to the library as gifts if the library is the named subscription holder. Do not count subscriptions that are supplied by library users that subscribe in their name and deliver these items to the library as a courtesy. Do not report the number of individual issues; e.g., report three current subscriptions to *Time* and four subscriptions to *People* as 7 subscriptions.

#### 11. Total Physical Items in Collection

This is a calculated field in the survey that tracks all circulating physical items reported in the collection. These are materials that are in a fixed, physical format available for use outside the library. This includes 1a, 31, 5a, and 7a.

## Section III. Library Services

### Circulation

#### 1. Circulation Transactions

A circulation transaction is the act of loaning materials at a library or bookmobile in all formats for use outside the library. This activity includes checking out materials to users, either manually or through a self-checkout system, and renewing materials, each of which is reported as a circulation transaction. Include items circulated from all library units (e.g., main library, branches, bookmobiles, and book-by-mail programs) administered by the library board.

Do not include OverDrive use (how to report uses of these non-physical materials are explained in the [Use of Digital Resources and Library Collection flowchart](#)). Interlibrary loan (ILL) items provided to the library and checked out by the library to a library user should be reported here as a circulation. Do not include ILL items sent to another library.

#### 1a. Total Circulation

Report the total annual circulation of all physical library materials of all types, including renewals.

#### 1b. Children's Materials

Circulation of Children's Materials is the annual circulation, including renewals, of all children's material in all formats to all users. Report the total annual circulation of children's materials. Children are defined as ages



birth-11 [[National Center for Education Statistics \(NCES\) Services and Resources for Children and Young Adults in Public Libraries August 1995, NCES 95357](#)]. The number is a subset of the total reported in 1a.

1c. Circulation of Other Physical Items

Circulation of all physical items other than print books, physical audio units, physical video units, and serials, including renewals. These are materials in a fixed, physical format for use outside the library. These can include a variety of items such as wi-fi hotspots, sewing machines, cake pans, tools, board games, etc. This item corresponds with Section II 7 Other Materials Owned. This item is a subset of Total Circulation in 1a.

### Interlibrary Loan (ILL) Transactions

Interlibrary loans (ILL) are library materials—or copies of the materials—provided by one autonomous library to another upon request. The libraries involved in ILL are not under the same administration.

Method for Counting Interlibrary Loan (ILL) Transactions – **either** select “Categorized ILL Transactions” **or** “Total ILL Transactions”. **Do not report values for both.**

#### Categorized ILL Transactions

Select the level of detail your library can provide for ILL transactions. Select “Categorized ILL Transactions” if your library can provide details on the number of items loaned via your ILS and other modes, the Division for Libraries and Technology will fill in (at a later date prior to the Annual Report deadline) the number of items loaned using WISCAT. If “Categorized ILL Transactions” is selected, the following table will display:

ILL Transactions		
<input type="checkbox"/> Method for Counting ILL Transactions	Categorized ILL Transactions ▼	
Categorized ILL Transactions		
	Items Loaned To Other Libraries	Items Borrowed From Other Libraries
<u>Integrated Library System (ILS)</u>	<input type="text"/>	<input type="text"/>
<u>WISCAT</u>	<input type="text"/>	<input type="text"/>
<u>Other (Includes OCLC, manual tracking, or other methods)</u>	<input type="text"/>	<input type="text"/>
<u>Total</u>	8,665,566	8,758,636

Items Loaned (provided to) Other Libraries via Shared Integrated Library System (ILS):

These are library materials, or copies of the materials, provided by one autonomous library to another, where both libraries are part of the same shared integrated library system. Items counted here should not also be counted in as WISCAT or Other transactions.

Items Received from (borrowed from) Other Libraries via Shared Integrated Library System (ILS):

These are library materials, or copies of the materials, received from one autonomous library to another, where both libraries are part of the same shared integrated library system. Items counted here should not also be counted as WISCAT or Other transactions

Items Loaned (provided to) Other Libraries via WISCAT:

These are library materials, or copies of the materials, provided by one autonomous library to another through the WISCAT interlibrary loan platform. Items counted here should not also be counted as ILS or Other transactions.

Items Received from (borrowed from) Other Libraries via WISCAT:

These are library materials, or copies of the materials, received from one autonomous library to another through the WISCAT interlibrary loan platform. Items counted here should not also be counted as ILS or Other transactions.

Items Loaned (provided to) Other Libraries via Other mode:

These are library materials, or copies of the materials, provided by one autonomous library to another through a different mode of resource sharing such as OCLC or ALA form. Items counted here should not also be counted as ILS or WISCAT transactions.

Items Received from (borrowed from) Other Libraries via Other mode:

These are library materials, or copies of the materials, received from one autonomous library to another through a different mode of resource sharing such as OCLC or ALA form. Items counted here should not also be counted as ILS or WISCAT transactions.

### Total ILL Transactions

Select “Total ILL Transactions” to supply the total number of items loaned through ILL transactions without the additional layer of detail in “Categorized ILL Transactions.”

ILL Transactions			
<input type="checkbox"/>	<a href="#">Method for Counting ILL Transactions</a>	<input type="checkbox"/>	Total ILL Transactions ▼
Total ILL Transactions			
<input type="checkbox"/>	<a href="#">2a. Items Loaned (provided to)</a>	<input type="checkbox"/>	8,665,566
<input type="checkbox"/>	<a href="#">2b. Items Received (borrowed from)</a>	<input type="checkbox"/>	8,758,636

#### 2a. Items Loaned

These are library materials, or copies of the materials, loaned (provided) by your autonomous library to another library upon request. The libraries involved in interlibrary loans are not under the same library administration. “Library Administration” means Administrative Entity (not anything broader). Do not include items loaned between outlets within the same library administrative entity. These data are reported as annual figures.

#### 2b. Items Received

These are library materials, or copies of the materials, received (borrowed) by your autonomous library from another library upon request. The libraries involved in interlibrary loans are not under the same library administration. “Library Administration” means Administrative Entity (not anything broader). Do not include items loaned between outlets within the same library administrative entity. These data are reported as annual figures.

### Users/Use

#### 3. Registered Users

A registered user is a library user who has applied for and received an identification number or card from your public library that has established conditions under which the user may borrow library materials and gain access to other library resources. Do not report this figure unless the library has purged its files at least once within the last three years. If a current count is not available, please check the “not available” checkbox to the right of the data field. These are library card account holders.

### 3a. Resident Users

Resident users are library cardholders who live within the borders of the municipality that is the governing body of the library. For example, if the Fair Oak Public Library is a municipal library, whose library board is appointed by the mayor of the city of Fair Oak, then the resident users would be those people who live within the city limits of Fair Oak. Note: if the library is a joint library with two or more municipalities in the agreement, then count the municipal residents of each of those municipalities. Enter the number of registered resident users.

### 3b. Nonresident Users

Nonresident users are library cardholders who live outside of the municipality's borders, in communities that do not have libraries. For example, someone who lives in the village of Pine Grove may have a Fair Oak Public Library card although Pine Grove is not within the city limits of Fair Oak and Pine Grove does not have a library, so the Fair Oak user from Pine Grove is a nonresident cardholder at the Fair Oak Public Library. Extending the example, a user who lives in Elm Falls, a community with a library, who applies for and receives a Fair Oak card and uses only the Fair Oak library would not be a nonresident, because there is a library in the user's home community of Elm Falls. In this example, the Elm Falls user cannot be a nonresident user because nonresidents can only be from non-librariated communities. Enter the number of registered nonresident users.

### 3c. Total Registered Users

The total number of registered users is automatically calculated from 3a and 3b.

### **NEW** 3d. Overdue Fine Policy

Does the library charge overdue fines to any users when they fail to return physical print materials by the date due? Enter Yes or No.

## Reference Transactions and Library Visits

If an annual count of reference transactions is unavailable, count reference transactions during a typical week or weeks and multiply the count to make an annual estimate. See the [WI Libraries for Everyone blog post "The Annual Report – Survey Week Reminder..."](#) for more information on survey weeks. (If the sample is done four times a year, multiply totals by 13; twice a year, multiply by 26 and sum; one week annually, multiply by 52.) A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or in the library. Choose seven consecutive calendar days in which the library is open its regular hours. A more rigorous sample survey than a typical week may be desirable and should be used if available; for instance, sampling four different weeks throughout the year would yield more accurate results.

### 4. Reference Transactions

A reference transaction is an information consultation in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. A reference transaction includes information and referral service as well as unscheduled individual instruction and assistance in using information sources, including websites and computer-assisted instruction. Count Readers Advisory questions as reference transactions. Information sources include:

- Printed and non-printed material
- Machine-readable databases, including computer-assisted instruction
- The library's own catalogs and other holdings records
- Other libraries and institutions through communication or referral
- Persons both inside and outside the library

When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again. If a contact

includes both reference and directional services, report it as one reference transaction. Duration should not be an element in determining whether a transaction is a reference transaction.

Libraries shall not include directional transactions in the report of reference transactions. Directional transactions include giving instruction for locating staff, library users, or physical features within the library. Examples of directional transactions include, "Where is the reference librarian?" "Where is Susan Smith?" "Where is the rest room?" "Where are the 600s?" "Can you help me make a photocopy?"

#### 4a. Method Used to Count Reference Transactions

Using the dropdown list, indicate whether you tallied reference questions throughout the year (actual count) or during a survey period(s).

#### 4b. Annual Count of Reference Transactions

Enter the total annual count of reference transactions.

### 5. Library Visits

Library visits is the total number of persons entering the library for whatever purpose during the year.

#### 5a. Method Used to Count Library Visits

Using the dropdown list, indicate whether you tallied reference questions throughout the year (actual count) or during a survey period(s).

#### 5b. Annual Count of Library Visits

Enter the total annual count of library visits.

## Use of Digital Resources

Report the number of uses of the following electronic resources for your library. System-wide electronic resources may be reported if the use can be authenticated to your library's patrons (for remote access) and for sessions conducted on library public-access computers. If the use count information is unavailable for your library, mark the "not available" checkbox to the right of the data field. Do not report estimates. Fields are prefilled if your system has provided data to the Division for Libraries and Technology. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

#### 6a. Number of Public Use Computers

Report the total number of library computers (personal computers (PCs) and laptops), whether purchased, leased, or donated, that are used by the general public in the library. Do not count laptops, netbooks, tablets, or other wireless devices brought and used by patrons. Do not count computers used only by the staff.

#### 6b. Number of Public Use Computers with Internet Access

Of the total reported in 6a, report the number that are Internet computers. You may include library-owned computers or laptops that rely on wireless Internet access. Do not include computers that connect to the Internet for a dedicated purpose (e.g., to access an OPAC or specific database, or to train the public) or purposes. Do not count computers used only by the staff.

#### 6c. Method Used to Count Uses of Public Internet Computers

Use the dropdown list to indicate how total uses of public Internet computers was collected or select "did not collect."

#### 6d. Annual Count of Public Internet Computer Uses

Report the total number of uses (sessions) for public Internet computers in the library during the last year. If the computer is used for multiple purposes (Internet, word processing, OPAC, etc.) and Internet users cannot be

isolated, report all usage. A survey tally of a typical week or longer periods, extrapolated to a full year, may be used to determine the annual number. Sign-up forms or Web log-tracking software also may provide a reliable count uses.

Note: The number of uses (sessions) may be counted manually using registration logs. Count each use (session) for public Internet computer(s), regardless of the time spent on the computer. Software solutions for controlling access to patron computers may also provide accurate counts. If the data element is collected in a weekly survey, that figure should be multiplied by the number of weeks the library is open during the year to annualize it (please retain documentation of survey collection). Do not report wireless connections from customer-owned computers or devices here.

#### **UPDATED DEFINITION** 7a. Method Used to Count Uses of Wireless Internet Access

Use the dropdown list to indicate how total uses of the library's wireless Internet access was collected. Regardless of whether your library used a 'Router Count' and 'Password Controlled' access, identify whether your library collected an Actual Count or used a Survey Week to estimate the annual count.

#### 7b. Annual Count of Wireless Internet Access Uses

Enter the total number of uses. If not collected, this field will not display.

#### 8. Number of Website Visits

Enter the total number of website visits. If not collected, select the checkbox for "Not available." Visits represent the annual number of sessions initiated by all users from inside or outside the library to the library website. The library website consists of all webpages under the library's domain. A website "visit" or "session" occurs when a user connects to the library's website for any length of time or purpose, regardless of the number of pages or elements viewed. Usage of library social media accounts (e.g., Facebook, Twitter, etc.) should not be reported here.

## Use of e-Resources

**Resource.** Use the [Use of Digital Resources and Library Collection flowchart](#) to help determine whether electronic materials use should be counted as "Electronic Collection Retrievals" or "Uses of electronic materials by Users of Your Library."

#### 9. Electronic Collection Retrievals

Electronic collection retrievals is 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 online public access catalog (OPAC) or library website. [based on [NISO Standard Z39.7 \(2013\) 7.7, p. 52](#)]

#### 9a. Electronic Collections (Locally owned or leased)

Report the total number of successful retrievals from electronic collections owned or leased by the library. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

#### 9b. Other Electronic Collections (purchased by library system or consortia)

Report the number of successful retrievals from electronic collections owned or leased by the system or consortia. This field may be prefilled with data provided to the Division for Libraries and Technology. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

#### 9c. Statewide Electronic Collections (provided through BadgerLink)

Report the number of successful retrievals from electronic collections provided through BadgerLink. This field may be prefilled with data provided to the Division for Libraries and Technology. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

#### 9d. Total Electronic Collections (local, system, and statewide)

The total number of successful electronic collection retrievals is the sum of items 9a through 9c and is automatically calculated and displayed.

#### 10a. Uses of E-Books by Users of Your Library

E-books typically correspond to printed works, although cataloged as distinct resources, and are made available for use when downloaded to users on portable devices (e book readers) or personal computers for a limited time.

Report the number of annual e-book uses by users of your library. Report only if you can document the uses or if your system has authenticated the use. This field may be prefilled if your system has provided data to the Division for Libraries and Technology. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

#### 10b. Uses of E-Audio by Users of Your Library

E-audios correspond to commercial works, although cataloged as distinct resources, and are made available for use when downloaded to portable audio devices or personal computers for a limited time.

Report the number of annual electronic audio (e-audio) uses by users of your library. Include sound recordings such as web-based or downloadable audio books and MP3 files such as OverDrive titles made available by your system, if the system can authenticate the use by your library's patrons. This field may be prefilled if your system has provided data to the Division for Libraries and Technology. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

#### 10c. Uses of E-Video by Users of Your Library

E-videos typically correspond to commercial works, although cataloged as distinct resources, and are made available for use when downloaded to users on portable devices or personal computers for a limited time.

Report the number of annual electronic video (e-video) uses by users of your library. This includes OverDrive titles made available by your system if the system can authenticate the use by your library's patrons. This field may be prefilled if your system has provided data to the Division for Libraries and Technology. See the [Use of Digital Resources and Library Collection flowchart](#) for more information.

#### 10d. Total Uses of Electronic Materials

Total electronic materials use is automatically calculated.

#### 10e. Uses of Children's Electronic Materials

Total uses of children's downloadable content (e-books, e-audio, and e-video) is prefilled with information provided by the Wisconsin Public Library Consortium (WPLC). The number is a subset of the Total Uses of Electronic Materials.

## Library Programs

**NEW**. Libraries are expected to report programming data for the number of in-person programs and attendance as well as the number of live, virtual programs and attendance and views of pre-recorded programs.

In addition to differentiating between in-person, live virtual, and pre-recorded programs, IMLS is moving to

break out target audience groups to more specific groups. **For 2022, Children’s Programming is broken out into two distinct age brackets: ages 0-5 and ages 6-11.** “Other” programs was replaced in 2021 by two categories – “Adult” for any program that specifically targets people aged 19 and older and “General Interest” which designates programs that are appropriate for any age, such as family game nights or holiday events. You can find more details about these changes outlined below.

**Resources.** Resources are available for details on how to report in-person, live virtual, and pre-recorded programs: [2020 Wisconsin Public Library Annual Report: Virtual Programming and Recording Views Google Slideshow with speaker notes](#) and the corresponding [2020 Wisconsin Public Library Annual Report Virtual Programming and Recording Views video](#).

A Programming and Activity Count tracker workbook is available to easily compile your program counts and attendance to report on the Public Library Annual Report. **Correction.** Total program statistics by Onsite, Offsite and Live, Virtual are included in the [Program and Activity Count Tracker](#) in a table labeled 14 but should be reported in 11 and 12. Report onsite programs and attendance in 11f. Report offsite programs and attendance in 11g. The virtual totals are reported in 12f.

Previously issued resources that do not include descriptions of the live, virtual or pre-recorded programming categories include the Wisconsin Valley Library Service’s Digital Bytes video recording of [“Keeping Track and Recording Program Stats in the Wisconsin Public Library Annual Report”](#) with Tessa Michaelson Schmidt, DPI, and Anne Hamland, Wisconsin Valley Library Service. Tessa and Anne discuss programming and self-directed activities, outreach activities, and tracking all of these using the Programming and Activity Count tracker.

You may also refer to the examples in the [Wisconsin Public Library Annual Report Input Youth Services Definitions and Examples](#) document. This delineates the difference between programs and self-directed activities, but does not yet include the live, virtual or pre-recorded programming formats.

## **NEW** In-person, Virtual, and Pre-recorded Program Statistics

### **In-Person Programs and Program Attendance Annual Count**

#### 11. In-Person Programs and Program Attendance Annual Count

An in-person library program is a planned event which introduces the in-person group attending to any of the broad range of library services or activities or which directly provides information to participants. In-person programs may cover use of the library, library services, or library tours. In-person library programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of in-person programs include: film showings; lectures; story hours; literacy, English as a second language, and citizenship classes; and book discussions.

Count all in-person programs held on- or off-site that are sponsored or co-sponsored by the library. For example, a book club offered every two weeks, 24 weeks a year, should be counted as 24 programs. Exclude in-person programs sponsored by other groups that use library facilities. If in-person programs are offered as a series, count each in-person program in the series. If an in-person library program is co-sponsored by another library, the library that is hosting the program should count the program and the attendance. If an in-person library program is co-sponsored by another library and hosted at a neutral location, the libraries involved should determine which library will report the program and attendance without duplicating the number of programs or attendance on another library’s annual report. For example, the libraries may choose to divide the attendance figures evenly between each library’s report or proportionately based on service population, however, only one library may count the program.

Note: Exclude library activities delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, resume writing assistance, homework assistance, and mentoring

activities.

**NEW** 11a. Children's In-Person Programs Ages 0 to 5

Report the Number of Children's In-Person Programs Ages 0 to 5. A children's in-person program ages 0 to 5 is any planned event for which the primary audience is children 5 years and younger that introduces the group attending to any of the broad range of library services or activities for children or which directly provides information to participants. Examples of these types of programs include story hours and summer reading events.

Children's In-Person Program Attendance Ages 0 to 5 is the total attendance for all children's programs for which the primary audience is children 5 years and younger. Include adults or other patrons who attend the children's program, regardless of age. Include attendance at scheduled programs conducted during the summer.

**NEW** 11b. Children's In-Person Programs Ages 6 to 11

Report the Number of Children's In-Person Programs Ages 6 to 11. A children's program in-person ages 6 to 11 is any planned event for which the primary audience is children ages 6 to 11 years that introduces the group attending to any of the broad range of library services or activities for children or which directly provides information to participants. Examples of these types of programs include story hours and summer reading events.

Children's In-Person Program Attendance Ages 6 to 11 is the total attendance for all children's programs for which the primary audience is children ages 6 to 11 years. Include younger children, adults or other patrons who attend the children's program, regardless of age. Include attendance at scheduled programs conducted during the summer.

**NEW NUMBER** 11c. Young Adult In-Person Programs

A Young Adult In-Person Program is any planned event for which the primary audience is young adult ages 12 through 18 that introduces the group attending to any of the broad range of library services or activities for young adults or which directly provides information to participants. Examples of these types of programs include book clubs and summer reading events.

Young Adult In-Person Program Attendance is the total attendance for all programs for which the primary audience is young adults ages 12 through 18. Include adults or other patrons who attend the young adult program, regardless of age. Include attendance at scheduled programs conducted during the summer.

**NEW NUMBER** 11d. Adult In-Person Programs

An Adult In-Person Program is any planned event for which the primary audience is adults ages 19 or older. Examples of these types of program sessions include, but are not limited to, book discussions, citizenship classes, and lectures. Each program session should only be counted in one age category based on its primary target audience.

Adult In-Person Program Attendance is the count of the audience at all program sessions for which the primary audience is adults ages 19 or older. Count all attendees of these program sessions regardless of age. Do not count attendance at meetings or programs conducted at the library by other groups that are not co-sponsored by the library; for example, exclude teen advisory board, library board, library foundation, or library friends group meetings.

**NEW NUMBER** 11e. General Interest In-Person Programs

A General Interest In-Person Program is any planned in-person event that is appropriate for any age group



or multiple age groups. Include all-age, all-library, family, and inter-generational program sessions. Examples of these types of program sessions include, but are not limited to, family game nights, holiday events, storytelling programs, or chess clubs. Include all programs here that do not fit into the other age category elements. Each program session should only be counted in one age category based on its primary target audience; do not include program sessions here that have already been counted in earlier age category elements. Avoid including program sessions that are targeted at more than one non-adult age category (and are not targeted at adults); these should be counted in the child or young adult age category that best represents the target audience.

General Interest In-Person Program attendance is the count of the audience at all program sessions that are appropriate for any age group or multiple age groups. Please count all attendees of these program sessions regardless of age.

**NEW** 11f. Onsite programs In-Person Programs - Subtotal

The number of in-person programs and program attendance for all age groups in 11a to 11e which were provided onsite. The sum of onsite (11f) and offsite (11g) counts should equal the total calculated in 11h.

**NEW** 11g. Offsite programs In-Person Programs - Subtotal

The number of in-person programs and program attendance for all age groups in 11a to 11e which were provided offsite. The sum of onsite (11f) and offsite (11g) counts should equal the total calculated in 11h.

**NEW NUMBER** 11h. Total In-Person Library Programs

The total number of in-person programs and total in-person program attendance are automatically calculated and displayed in LibPAS.

**NEW NUMBER** 11i. Describe the library's in-person programs

Use this narrative field to describe the library's in-person programs including any significant successes, collaborations, and changes from the prior year including staffing changes.

**Live Views of Virtual Programs and Virtual Program Attendance Annual Count**

12. Live Virtual Programs and Live Virtual Program Attendance Annual Count

A live, virtual library program is any planned library program that is live-streamed virtually and viewed live as it progresses (called "synchronous live-streaming"). Regardless of the number of formats in which a live, virtual program session is offered, each live, virtual program session should only be counted once. Include live, virtual program sessions that are also recorded for asynchronous viewing as a single live, virtual program session. Exclude live, virtual program sessions that also have an in-person component from the "Number of Live Virtual Programs" count; these should be counted as in-person programs and the live attendees should be categorized as "In-person Program Attendees." Do not duplicate numbers for each branch.

A live, virtual program is a planned event which introduces the group attending to any of the broad range of library services or activities or which directly provides information to participants. Live, virtual programs may cover use of the library, library services, or live, virtual library tours. Live, virtual programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of live, virtual programs include: lectures; story hours; literacy, English as a second language, and citizenship classes; and book discussions.

Count all live, virtual programs that are sponsored or co-sponsored by the library. For example, a book club offered every two weeks, 24 weeks a year, should be counted as 24 programs. Exclude programs sponsored by other groups that use library facilities. If live, virtual programs are offered as a series, count each program in the

series. If a live, virtual library program is co-sponsored by another library, the library account that is hosting the program could count the program or allow the co-sponsor to count the program so long as the libraries are in agreement and not both counting the program. The views may be counted by the account holder library, the co-sponsor, or divided using a mutually agreed upon method such as evenly, or proportionately by service population so long as the views are not counted on each library's annual report.

Note: Exclude live, virtual library activities delivered on a one-to-one basis, rather than to a group, such as one-to-one virtual literacy tutoring, virtual services to homebound, virtual resume writing assistance, virtual homework assistance, and virtual mentoring activities.

**Resource.** Use the [Platform Metrics Guide for Live, Virtual Programming and Pre-recorded Views](#) to determine the appropriate reporting metric for some of the most commonly used virtual programming platforms.

**NEW** 12a. Children's Live, Virtual Programs Ages 0 to 5

A live, virtual children's program ages 0 to 5 is any planned, live, virtual event for which the primary audience is children 5 years and younger that introduces the live, virtual group attending to any of the broad range of library services or activities for children or which directly provides information to live, virtual participants. Examples of live, virtual programs include live, virtual story hours and live, virtual summer reading events.

Children's live, virtual program attendance ages 0 to 5 is the count of each view of all live, virtual children's programs for which the primary audience is children 5 years and younger. Include adults or other patrons who attend the live, virtual children's program, regardless of age. Include attendance at live, virtual programs conducted during the summer.

Report the number of views for children's live, virtual programs ages 0 to 5 that were recorded and posted for later (asynchronous).

**NEW** 12b. Children's Live, Virtual Programs Ages 6 to 11

A live, virtual children's program ages 6 to 11 is any planned, live, virtual event for which the primary audience is children ages 6 to 11 years that introduces the live, virtual group attending to any of the broad range of library services or activities for children or which directly provides information to live, virtual participants. Examples of live, virtual programs include live, virtual story hours and live, virtual summer reading events.

Children's live, virtual program attendance ages 6 to 11 is the count of each view of all live, virtual children's programs for which the primary audience is children ages 6 to 11 years. Include adults or other patrons who attend the live, virtual children's program, regardless of age. Include attendance at live, virtual programs conducted during the summer.

Report the number of views for children's live, virtual programs ages 6 to 11 that were recorded and posted for later (asynchronous).

**NEW NUMBER** 12c. Young Adult Live, Virtual Programs

A live, virtual young adult program is any planned event for which the primary audience is young adults ages 12 through 18 that introduces the live, virtual group attending to any of the broad range of library services or activities for young adults or which directly provides live, virtual information to participants. Examples of live, virtual programs include live, virtual book clubs and live, virtual summer reading events.

Young adult live, virtual program attendance is the count of each view of all live, virtual programs for which the primary audience is young adults ages 12 through 18. Include adults or other patrons who attend the live, virtual young adult program, regardless of age. Include attendance at live, virtual programs conducted during

the summer.

Report the number of views for young adult live, virtual programs ages 0 to 5 that were recorded and posted for later (asynchronous).

**NEW NUMBER** 12d. Adult Live, Virtual Programs

An adult live, virtual program session is any planned live, virtual event for which the primary audience is adults ages 19 or older. Examples of these types of program sessions include, but are not limited to, book discussions, citizenship classes, and lectures. Each program session should only be counted in one age category based on its primary target audience.

Adult live, virtual program attendance is the count of each view of all adult live, virtual library programs during the reporting period. The library's total should include any live, virtual programs conducted for adults or an unspecified/general audience. Do not count attendance at live, virtual meetings or programs conducted at the library by other groups that are not co-sponsored by the library; for example, exclude teen advisory board, library board, library foundation, or library friends group meetings.

Report the number of views for adult live, virtual programs ages 19 and older that were recorded and posted for later (asynchronous).

**NEW NUMBER** 12e. General Interest Live, Virtual Programs and Live Virtual Program Attendance

A general interest live, virtual program session is any planned live, virtual event that is appropriate for any age group or multiple age groups. Include all-age, all-library, family, and inter-generational program sessions. Examples of these types of program sessions include, but are not limited to, family game nights, holiday events, storytelling programs, or chess clubs. Include all programs here that do not fit into the other age category elements. Each program session should only be counted in one age category based on its primary target audience; do not include program sessions here that have already been counted in earlier age category elements. Avoid including program sessions that are targeted at more than one non-adult age category (and are not targeted at adults); these should be counted in the child or young adult age category that best represents the target audience.

General interest live, virtual program attendance is the count of each view of all general interest live, virtual program sessions that are appropriate for any age group or multiple age groups. Please count all attendees of these program sessions regardless of age.

Report the number of views for general interest live, virtual programs ages 0 to 5 that were recorded and posted for later (asynchronous).

**NEW NUMBER** 12f. Total Live, Virtual Library Programs

The total number of live, virtual programs, the total live, virtual program attendance, and the total asynchronous views of recorded live, virtual programs are automatically calculated and displayed in LibPAS.

**NEW NUMBER** 12g. Which platforms does the library use to host the library's live, virtual programs

Enter the names of any platforms used to host the library's live, virtual programs (e.g., Facebook Premiere, YouTube Live, Crowdcast, etc.) separated by commas.

**NEW NUMBER** 12h. Describe the library's live, virtual programs

Use this narrative field to describe the library's live, virtual library programs including any significant successes, collaborations, and changes from the prior year including staffing changes.

## Views of Pre-recorded Programs and Pre-recorded Program Attendance Annual Count

### 13. Pre-recorded Programs and Pre-recorded Program Attendance Annual Count

**UPDATED DEFINITION** A pre-recorded library program is any planned event that is recorded by the library for asynchronous streaming (for later, on-demand viewing). Only include programs posted during the reporting period. Only include views of program sessions for a period of thirty (30) days after the presentation was posted. If your library is unable to limit the session count for 2022 to the 30-day period, then report programs session in the same manner as 2021 and plan to implement this 30-day period for 2023. Regardless of the number of formats in which a pre-recorded program is hosted, each pre-recorded program should only be counted once. Do not duplicate numbers for each branch. Exclude program sessions that also have an in-person component or live, virtual attendance; these should be counted as in-person programs or live, virtual programs respectively.

A pre-recorded program is a planned event which introduces the viewer to any of the broad range of library services or activities or which directly provides information to the viewer. Pre-recorded programs may cover use of the library, library services, or pre-recorded library tours. Pre-recorded programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of pre-recorded programs include library-recorded: lectures; story hours; literacy, English as a second language, and citizenship classes; and book discussions.

Count all pre-recorded programs that are sponsored or co-sponsored by the library. Exclude programs sponsored by other groups that the library is hosting. Exclude all pre-recorded programs that are not recorded by the library or co-sponsor. If pre-recorded programs are offered as a series, count each pre-recorded program in the series. If a pre-recorded library program is co-sponsored by another library, the library account that is hosting the program could count the program or allow the co-sponsor to count the program so long as the libraries are in agreement and not both counting the program. The views may be counted by the account holder library, the co-sponsor, or divided using a mutually agreed upon method such as evenly, or proportionately by service population so long as the views are not counted on each library's annual report.

#### **NEW** 13a. Pre-recorded Children's Programs Ages 0 to 5

A pre-recorded children's program ages 0 to 5 is any pre-recorded program for which the primary audience is children 5 years and younger that introduces the viewer to any of the broad range of library services or activities for children or which directly provides information to viewers. Examples of pre-recorded programs include story hours and pre-recorded summer reading events.

Children's pre-recorded program ages 0 to 5 views is the count of each view of all pre-recorded children's programs for which the primary audience is children 5 years and younger. Include adults or other patrons who view the children's pre-recorded program, regardless of age. Include attendance at pre-recorded programs conducted during the summer.

#### **NEW** 13b. Pre-recorded Children's Programs Ages 6 to 11

A pre-recorded children's program ages 6 to 11 is any pre-recorded program for which the primary audience is children ages 6 to 11 years that introduces the viewer to any of the broad range of library services or activities for children or which directly provides information to viewers. Examples of pre-recorded programs include story hours and pre-recorded summer reading events.

Children's pre-recorded program ages 6 to 11 views is the count of each view of all pre-recorded children's programs for which the primary audience is children ages 6 to 11 years. Include adults or other patrons who view the children's pre-recorded program, regardless of age. Include attendance at pre-recorded programs conducted during the summer.

**NEW NUMBER** 13c. Pre-recorded Young Adult Programs

A pre-recorded young adult program is any pre-recorded program for which the primary audience is young adults ages 12 through 18 that introduces the viewer to any of the broad range of library services or activities for young adults or which directly provides pre-recorded information to viewers. Examples of pre-recorded programs include book clubs and summer reading events.

Young adult pre-recorded program views is the count of each view of all pre-recorded programs for which the primary audience is young adults ages 12 through 18. Include adults or other patrons who view the pre-recorded young adult program, regardless of age. Include views of pre-recorded programs conducted during the summer.

**NEW** 13d. Adult Pre-recorded Programs

Adult (all ages) pre-recorded programs are any pre-recorded programs for which the primary audience is adults ages 19 or older.

Adult (all ages) pre-recorded program views is the count of each view of all adult pre-recorded programs. The library's total should include any pre-recorded programs conducted for adults ages 19 or older. Do not count views of pre-recorded meetings or programs conducted by other groups and hosted by the library that are not co-sponsored by the library; for example, exclude teen advisory board, library board, library foundation, or library friends group meetings.

**NEW** 13e. General Interest (All Ages) Pre-recorded Programs

General Interest (all ages) pre-recorded programs are any pre-recorded program appropriate for any age group or multiple age groups. Include all-age, all-library, family, and inter-generational program sessions. This includes pre-recorded programs for adults and seniors and programs that are cross-generational or for a general audience and not specific to any one target age group.

General Interest (all ages) pre-recorded program views is the count of each view of all general interest pre-recorded programs. The library's total should include any pre-recorded programs conducted for adults or an unspecified/general audience. Do not count views of pre-recorded meetings or programs conducted by other groups and hosted by the library that are not co-sponsored by the library; for example, exclude teen advisory board, library board, library foundation, or library friends group meetings.

**NEW NUMBER** 13f. Total Pre-recorded Programs and Pre-recorded Attendance

The total number of pre-recorded programs and total pre-recorded program views are automatically calculated and displayed in the annual report form.

**NEW NUMBER** 13g. Which platforms does the library use to host the library's pre-recorded programs

Enter the names of any platforms used to host the library's pre-recorded programs separated by commas (e.g., Facebook, Vimeo, YouTube, Instagram, etc.).

**NEW NUMBER** 13h. Describe the library's live, virtual programs

Use this narrative field to describe the library's live, virtual library programs including any significant successes, collaborations, and changes from the prior year including staffing changes.

## Section IV. Library Governance

Provide a complete list of all voting board members and officers as of the date of this report. Be sure to report the current library board president in the first row. If any positions are unfilled at the time of this report, enter "Vacant" in those positions' first and last name fields. If you cannot provide an email address for the president, please provide email addresses for other members for official DPI and library system communications. The dropdown list for salutations is used for formatting DPI and system correspondence and will not print on the final report.

Report changes in board membership, as well as changes in the office of library board president, to your system as they occur. When reporting the new appointments, please indicate departing members so that board membership can be updated.

### Number of Library Board Members

Report the total number of voting library board members, including vacancies that are authorized but not filled.

## Section V. Library Operating Revenue

Report revenue used for operating expenditures as defined at the beginning of Section VI. Report revenue by original source of income (federal, state, county, or other). This may require the library to contact its system to determine the source of funding provided by the system to the library. Do not report income used for capital expenditures (see the definition of library capital funds in Section VII) or income passed through to another agency; for example, meeting room fees paid by established agreement to the municipality. Report revenue for the calendar year just ended and round amounts to the nearest dollar.

Local and county government appropriations for library service are governmental funds designated by the municipality(ies) or county of the public library and available for expenditure by the public library. Library operating costs paid directly by the municipality may be included as library revenue and expenditures; however, the library must be able to document the expenditure of these funds for library purposes. Indicate separately funds directly expended by the local government for library services. (For example, employee fringe benefits or library heating and electrical expenses for a shared facility may be paid directly by the municipality. If documented, these expenditures would be indicated separately, and in addition to the library's appropriation, under income from local or county sources.) Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donations, or rent paid by the library to library's municipality for public library space.

In most cases, the type of municipality and the name of the municipality will be prefilled with prior-year data. Do not change this information unless your library's legal affiliation has changed. Report only the appropriation for the report year from the municipality that legally established the library. Only joint libraries formally established by inter-municipal agreements in s. 43.53 may report appropriations from more than one municipality. If your library has contributions for library services from other municipalities that are not part of a joint library agreement, those revenues should be reported in item 5 of this section as Contract Income from other governmental units.

1. Local Municipal Appropriations for Library Service

Report appropriations from the library’s local municipality as applicable. Do not include county appropriations, contract income, or donations here.

**1. Local Municipal Appropriations for Library Service**

Only joint libraries will report more than one municipality here. Under "Name," enter name only--do not include phrases such as City of, Town of, etc.

Municipality Type	Name	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/> \$0 \$162,480,512
<input type="text"/>	<input type="text"/>	<input type="text"/> \$ \$3,939,196
<input type="text"/>	<input type="text"/>	<input type="text"/> \$ \$599,750
<input type="text"/>	<input type="text"/>	<input type="text"/> \$ \$657,306
<input type="text"/>	<input type="text"/>	<input type="text"/> \$ \$111,665
<input type="text"/>	<input type="text"/>	<input type="text"/> \$ \$40,949
<input type="text"/>	<input type="text"/>	<input type="text"/> \$ \$0

Using the Municipality Type dropdown list, indicate whether the municipality that established the library is a city, village, town, or tribe. In the Name column, enter the name of the city, village, town, or tribe that established the library. In the Amount column, report the actual appropriation for the report year received from the city, village, town, or tribe that established the library. Legally established joint public libraries may use subsequent lines of the report as appropriate to report revenue from participating municipalities.

2a. Home County Appropriation for Library Service

Report the home county appropriation received by the library. This includes home county funds transferred to the library through the system or a county library service.

2b. Other County Payments for Library Services

Report other county payments for library services in this section. This includes other county funds transferred to the library, including those transferred through the system. Use the dropdown list to select the name of the county. These are county payments other than the home county appropriation reported in 2a.

3. State Funds

Report state funds received from your public library system or from another Wisconsin state program and deposited in your library fund. Funds from TEACH grants area reported here as it is funded by the state Universal Service Fund (USF) which is comprised (almost entirely) of state funds.

3a. Public Library System State Funds

Your system should verify the amount of state aid to public library systems funds paid to your library (if any). If your library received more than four individual grants, you may combine grants from the same source on one line, then list the individual projects in the notes (  ). Revenue reported here should not be reported as contract income (5 below), or as funds not expended in the previous year (6 below).

If state funds were expended or budgeted for capital outlays such as major equipment purchases, the funds should only be reported in Section VII. Library Capital Income, Expenditures, Debt Retirement, and Rent.

3b. Funds Carried Forward from Previous Year

Report system state funds carried forward from the previous year.

### 3c. Other State Funded Program

Enter a brief description of other state-funded programs and enter the total amount. Note: programs like Youth Aid Funds are reported here although the state funds are blended with federal funds. State statutes and federal regulations authorize state agencies to blend state aid with federal funds to focus on outcomes and simplify accounting. When the funds get blended, the funds are combined under a single set of reporting requirements and lose their original award-specific identity.

### 4. Federal Funds

Federal funds are any federal government funds distributed to the library for expenditure by the public library, including federal funds distributed by the state. Enter the name of the federal program(s) and the amount(s) received.

Report Library Services and Technology Act (LSTA) grant awards to your library here. For each award, enter the "DPI Grant Number" as the Project Number and "DPI Grant Name" as the Program Name. LSTA grant awards to systems that are used to reimburse your library for expenses or are otherwise passed through to your library should also be reported here.

If federal funds were expended or budgeted for capital outlays, such as major equipment purchases, the funds should only be reported in Section VII. Library Capital Income, Expenditures, Debt Retirement, and Rent.

#### *E-rate Reimbursement*

Wisconsin public libraries and regional library systems receive E-rate reimbursement in one of two ways: as a reduction in the cost of paid services or as a separate amount of reimbursement.

- If the cost of service is reduced, report only the actual amount paid in Section VI. Library Operating Expenditures. Do not report the amount of reduction as operating revenue.
- If the library receives E-rate reimbursement separately, report the amount in this item (Federal Funds) and include it in Section VI. item 7. Operating Expenditures from Federal Program Sources.

### 5. Contract Income

Contract income is income received from government units, libraries, and library systems other than your system for services provided by the library. State and federal funds received from your system should be reported as state or federal income above. Donations or payments for services from adjacent towns or villages (not part of a joint library) should be reported here. Reimbursement payments from counties should be reported in 2. Do not report federal Library Service and Technology Act (LSTA) grants received from the state or system, or state funds from your public library system as contract income.

Important: Enter the name of the agency from which your library received contract income and the amount received.

### 6. Funds Carried Forward

Include funds carried forward from the previous year and made available for library operating expenditures, except for state aid funds reported in 3b. above.

### 7. All Other Operating Income


All other operating income is any operating income other than that reported in items 1 through 6 above. Report monetary gifts, donations, interest, fines, and fees here if the funds were available for library use. Do not include the value of any contributed services or the value of in-kind gifts and donations. Do not include endowment and trust funds that were not available to the library for expenditure during the report year. Those funds should be reported in an attachment (see Section IX. Other Funds Held by the Library Board and Trust Fund Report).



## 8. Total Operating Income

Total Operating Income is the sum of items 1 through 7 and is automatically calculated and displayed.

## 9. Current Year Appropriation

Enter the current year appropriation provided by your governing body for public library service for the report year. This is the amount you expect to report next year in item 1 above for a municipal library (or item 2 for a county library), based on the local municipal budget. Joint libraries should list the total and add a note (  ) to provide a breakdown of the appropriations from each participating municipality.

## 10. Exemption from County Library Tax

Indicate whether your library's municipality was exempt from the county library tax under [Wis. Stat. s. 43.64 \(2\)](#) during the report year.

# Section VI. Library Operating Expenditures

Operating expenditures are current and recurrent costs necessary to the provision of library service. Library operating costs paid directly by the municipality may be included as income and expenditures; however, the library must be able to document the expenditure of these funds for library purposes. For example, employee fringe benefits or library heating and electrical expenses in a shared facility may be paid directly by the municipality. If documented, these expenditures may be included.

Do not include any of the following:

- Value of any contributed or in-kind services
- Value of any non-monetary gifts and donations
- Rent paid by the library to its municipality for public library space
- Capital expenditures under this category

(See instructions for Section VII. Library Capital Income, Expenditures, Debt Retirement, and Rent.)

### 1. Salaries and Wages

Enter the amount of salaries and wages for all library staff including plant operation, security, and maintenance staff for the year just ended. Include salaries and wages before deductions but exclude employee benefits.

### 2. Employee Benefits

Enter the amount of employee benefits outside of salary and wages paid and accruing to employees (including plant operations, security, and maintenance staff), regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts for paid employee benefits including Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, worker's compensation, tuition, and housing benefits.

### 3. Library Collection Expenditures

Enter all operating expenditures for all collection materials in print, microform, electronic and other formats considered part of the collection, whether purchased, leased, or licensed for use by the public.

#### 3a. Print Materials

Print material consists primarily of words, usually produced by making an impression with ink on paper. Included in the category are books, serial back files, current print serial subscriptions, government documents, and any other print acquisition. Include book rentals, but exclude expenditures for binding and rebinding. Report all operating expenditures for print materials.

### 3b. Electronic Materials

Electronic (digital) materials include e-books, e-serials (including journals), e-audio, government documents, databases (including locally mounted, full text or not), electronic files, reference tools, scores, maps, or pictures in electronic or digital format, including materials digitized by the library. Electronic materials can be distributed via computer software, CD-ROM, or other portable digital carrier, and can be accessed via computer, via access to the Internet, or by using an e-book reader. Report all operating expenditures for electronic (digital) materials. Include expenditures for materials held locally and for remote electronic materials for which permanent or temporary access rights have been acquired. Include expenditures for database licenses.

Expenditures for computer software used to support library operations or to link to external networks, including the Internet, are reported under Other Operating Expenditures below.

### 3c. Audiovisual Materials

Audiovisual materials are library materials that are displayed by visual projection or magnification, sound reproduction, or both, including graphic material, audio material, motion pictures, and video material; also special visual materials such as maps and three-dimensional materials. Report all operating expenditures for audiovisual materials. Report expenditures for downloadable audio and video content (e-audio and e-video) in 3b above.

### 3d. All Other Library Materials

Report operating expenditures for all other materials.

### 3e. Subtotal 3

Subtotal 3 is the sum of library collection expenditure items 3a through 3d and is automatically calculated and displayed.

### 4. Contracts for Services

Report here any expenditure for contract arrangements with other libraries, their municipalities, or public library systems. Funds reported here are the funds paid out by your library. Indicate the providing organization(s) receiving the funds.

### 5. Other Operating Expenditures

Report all operating expenditures not included in 1 through 4 above. Other operating expenditures include operation and maintenance of the physical facility, heating, lighting, postage, telephone, telecommunication charges, binding, supplies, and repair or replacement of existing furnishings and equipment.

### 6. Total Library Operating Expenditures

Total library operating expenditures for the year just ended is the sum of items 1 through 5. It is automatically calculated and displayed.

### 7. Operating Expenditures from Federal Sources

Report the amount expended from federal program sources. If the library is reimbursed for operating expenditures by a federal program such as E-rate, LSTA Grants to States, or Laura Bush 21st Century Librarian Program, expenditures from federal sources must not be zero. The criteria for reporting the LSTA grant amount is the year in which the funds were expended and not the year in which reimbursement was received.

# Section VII. Library Capital Revenue, Expenditures, Debt Retirement, and Rent

All Capital revenue and expenditures fields are required. If none, enter "0".

## 1. Capital Income and Expenditures by Source of Income

Enter capital revenues and capital expenditures by source of revenue for the year just ended. Report all revenue to be used for major capital expenditures and all capital expenditures. Include funds received for:

- Site acquisition
- New buildings
- Additions to or renovation of library buildings
- Furnishings, equipment, and initial collection (print, non-print, and electronic) for new buildings, building additions, or building renovations
- Computer hardware and software used to support library operations, to link to networks, or to run information products
- New vehicles
- Other one-time major projects

Exclude funds received for:

- Replacement and repair of existing furnishings and equipment
- Regular purchase of library materials
- Investments for capital appreciation
- Capital projects in the previous year but unspent in the report year

## Total Revenue and Expenditure

Total revenue and total expenditure are the sum of the revenue column and expenditure column, respectively. The two amounts are automatically calculated and displayed.

## 2. Debt Retirement

Enter debt retirement payments, if any, paid by the library board. If available, please add a note ( ) with a breakdown of amounts and corresponding sources. Debt retirement means paying off a debt completely. For example, when you make the final payment on a mortgage or student loan, the debt is retired.

## 3. Rent Paid to Municipality / County

Enter rent paid to the library's municipality by the library, or to the county if a county library, for public library space provided by the municipality or county.

# Section VIII. Other Library Funds Held by the Library Board

All funds under the library board's control must be reported as required by [Wis. Stat. s.43.58 \(6\) \(a\)](#). Report in this section any funds held by the library board that have not been reported in a previous section, *except* Trust Funds, which are reported in Section IX, below.

## Beginning Balance of Other Funds Under Library Board Control

Report the total balance of such funds at the beginning of the report year.

#### Additions

Report additions such as new deposits, transfers in, and interest earnings.

#### Subtractions

Report total subtractions (debits) including fees paid, transfers out, losses, or direct expenditures.

#### Total Amount of Other Funds at End of Year

The total amount of other funds held by the library board is calculated automatically. Only this total amount of other funds is included on the printable report generated by LibPAS.

Note: Funds transferred to a library foundation should also be reported here in cases where the library board maintains control of the principal.

## Section IX. Trust Fund Report

Report the total amount of other funds and trust funds held at end of year in the space provided. A "Trust Fund" indicates that a library trustee has been appointed as financial secretary and that donated library funds or property have been transferred to that person to be invested as allowed under [Wis. Stat. s. 43.58 \(7\) \(b\)](#), that person has been bonded under [Wis. Stat. s. 43.58 \(7\) \(c\)](#). The financial secretary is required to prepare and submit a report under [Wis. Stat. s. 43.58 \(7\) \(d\)](#) and attach it to the signed annual report that is submitted to the Division for Libraries and Technology.

Wis. Stat. s. 43.58 (7) (d) also requires that an annual report of trust fund activity be provided to the library board and the Division for Libraries and Technology. If your library has a trust fund, attach the trust fund report to the print copy of this annual report filed with the Division.

Wis. Stat. s. 43.58 (7) (d) reads as follows:

(d) The treasurer or financial secretary shall make an annual report to the library board showing in detail the amount, investment, income and disbursements from the trust funds in his or her charge. Such report shall also be appended to the annual report of the library board under s.43.58 (6).

#### Beginning Balance

Report the total balance of such funds at the beginning of the report year.

#### Additions

Report additions such as new deposits, transfers in, and interest earnings.

#### Subtractions

Report total subtractions (debits) including fees paid, transfers out, losses, or direct expenditures.

#### Total Amount of Trust Funds Held by the Library Board

The total amount of trust funds held by the library board is calculated automatically. Only this total trust fund amount is included on the printable report generated by LibPAS.

# Section X. Staff

Report staffing as of the last day of the year just ended. Indicate all positions funded in the library’s budget, regardless of whether those positions were filled. Do not list volunteers or staff paid from funds not administered by the library. Salary data with position titles (no names of individuals) and wages is distributed to library system administrators so they may assist member libraries with comparative salary queries.

## 1. Personnel Listing

Libraries with more than 15 employees should list the head librarian/director, chief assistants, branch librarians, division heads and other supervisory personnel in 1a, and see the instructions for 1b below. To provide an accurate FTE total for all library staff, libraries must complete item 2 as well. Include maintenance, plant operation and security staff paid by the library. Do not report names of individuals.

### 1a. Employees Holding the Title of Librarian


Librarians are persons who do paid work that usually requires professional training and skills in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. The usual education requirement is a master’s degree from programs of library and informational studies accredited by the American Library Association (ALA); however, other persons may hold the title of Librarian.

List the Library Director on the first line. Libraries with more than 15 employees, report individual positions with the title of “librarian” in 1a, with assistant directors and department heads listed first. Include others by title below in 1b. Other full-time positions may be reported here if space allows; otherwise list positions, total wages and total hours in 1b below. Use the Type of Staff dropdown list to indicate whether person in a position of librarian has an ALA/MLS.

The Division for Libraries and Technology does not request names of individual employees.

### 1b. Other Paid Staff

Libraries with more than 15 employees should complete this section to include staff not reported in 1a. Report the requested information for as many position classifications as space allows, beginning with those classifications with the most hours worked in a week. Libraries with more than 15 employees must also provide the full-time equivalent for all All Other Paid Staff in 2b below. Enter other paid staff information as requested. Using the Type of Staff dropdown list, indicate whether the position requires an ALA/MLS. This includes all other employees paid from the library’s budget, including plant operation, maintenance and security personnel.

For example, if a library has multiple employees in four different classifications, the library would report as shown below. The note icon (  ) can be used to add comments or details about employees included in each classification line. Do not report the total number of employees, just the total number of hours for all staff having that title or job classification. Do not include or duplicate any of the employees reported in 1a.

Job Title	Type of Staff	Total Annual Wages Paid	Hours Worked Per Week
Librarian	MLS (ALA)	\$84,500	75
Circulation Clerks	Librarian no MLS	\$86,300	120
Pages	Other	\$12,900	30
Maintenance	Other	\$31,000	35

Use spaces provided to report as many positions as necessary or possible. If there is not enough space, report as many in hierarchical order as will fit.

## 2. Library Staff Full-Time Equivalent

Compiling information for all library staff is particularly important for large libraries that did not report all employees in 1a. and 1b. above. The full time equivalent (FTE) for any staff category is determined by summing the total hours worked per week by all category employees and dividing by 40. To ensure comparable data, 40 hours per week is the measure of full-time employment. For example, if a library has 15 employees working 37.5 hours per week each, then the FTE calculation is  $15 \times 37.5 / 40$  or 14.06 FTEs. Round to two decimal places.

### 2a. Persons Holding the Title of Librarian

See the definition of librarian in 1a. Do not include any employee in more than one category.

For all employees with Master's degrees from programs accredited by ALA, divide the total hours worked per week by 40. For all other persons holding the title of Librarian, divide the total hours worked per week by 40.

The FTE subtotal for persons holding the title of librarian is the sum of the two calculations above. The number is automatically calculated and displayed.

### 2b. All Other Paid Staff

Determine the total hours worked per week by all other paid staff paid from the library budget and divide the number by 40. Include plant operation, security, and maintenance staff.

### 2c. Total Library Staff

The total library staff full time equivalent is the sum of the FTEs reported in 2a and 2b and is automatically calculated and displayed.

## Section XI. Loans to Nonresidents

Nonresidents are library users who live outside the library's legal service jurisdiction (the governmental unit(s) establishing the public library). For consolidated county libraries, it means outside the county. For joint libraries, it means outside the municipalities that established the joint library. Circulation is defined at the beginning of Section III. Library Services.

Provide the requested information for items 1 through 9. The information provided in 2b. Circulation to Nonresidents Living in Your County – Those Without a Library is needed to calculate county payments for nonresident use of the library. For those libraries in communities with territory in more than one county, report nonresident use for your home county only in 2b. Report other county nonresident use in item 3 or 4 and 9, as appropriate.

### 7. Method for Determining Circulation Allocation

Use the dropdown list to select "Actual Count" or "Survey." If you use a survey to sample nonresident use, you must retain all documents and policies delineating the method used to attribute registration and use. Weekly surveys should be conducted on at least four weeks throughout the year. More defensible results are achieved with computerized library circulation systems where resident status is determined at patron registration and circulation is tracked and tallied automatically throughout the year. Actual reports of circulation distribution should be retained according to the library's records retention policy, or until the subsequent reimbursement requests are submitted and received.

For more information, see [\*Guidelines for Collection of Public Library Nonresident Usage Statistics\*](#).

#### 8a. Access Denied Under [Wis. Stat. s. 43.17 \(11\) \(b\)](#)

Indicate whether your library denies access to any residents of adjacent public library systems on the basis of Wis. Stat. s. 43.17 (11) (b). The statute reads as follows:

(b) A public library in a public library system may refuse to honor valid borrowers' cards of a public library in an adjacent public library system if the total amount of the reimbursement received by the public library for the preceding year from that adjacent public library system, and from counties and municipalities that are located in that adjacent public library system, is less than the adjusted cost incurred for that year by the public library in honoring these cards.

#### 8b. Purchase of Library Cards

If the answer to 8a. is "Yes" as of the date the library's annual report is completed, indicate whether the library allows residents in adjacent systems to purchase library cards.

#### 9. Circulation to Nonresidents Living in an Adjacent County

Report the circulation to nonresidents from any adjacent counties who do not have a local public library and the name of the county. Information provided on lines 9a. through 9j. is needed to calculate adjacent county payments for nonresident use of the library where applicable.

Use the dropdown lists to indicate the county reported, and enter the total number of circulations to qualifying non-residents from that county who used your library throughout the report year. County names may be prefilled with those listed in the annual report.

## Section XII. Technology

### 1. Wireless Internet Access

- a) Indicate whether your library provides wireless Internet access for patrons' mobile devices.
- b) **NEW** Indicate whether your library provides external wireless access on the library grounds or from a mobile unit such as a bookmobile.

### 2. Broadband

Report State TEACH line, other broadband connection, or both.

- a) Indicate whether your library has a State TEACH line. If yes,
  - **NEW** provide Advertised Speed of TEACH line in Mbps, and
  - **NEW** the Name of your Internet Service Provider on the TEACH line.
- b) Indicate whether your library has an Other Broadband connection; e.g., local cable, telco, community network. If yes,
  - **NEW** provide Advertised Speed of the other broadband connection in Mbps, and
  - **NEW** the Name of your Internet Service Provider on the other broadband connection.

### 3. Internet Filtering

**UPDATED DEFINITION** Is your library [CIPA compliant](#)? CIPA stands for the Children's Internet Protection Act. This is a law that was established in 2000 and helps to protect minors from obscene content and abuse on the Internet, among other things. To be CIPA compliant all library-owned computers must have a technology protection measure to block or filter certain access and content and your library must have a board-approved internet safety policy.

# Section XIII. Self-Directed Activities, Staff Serving Youth, and Staff Serving Adults

Tracking all of self-directed activities is included in the [Programming and Activity Count tracker workbook](#) (downloads an Excel file) to easily compile your program counts and attendance to report on the Public Library Annual Report.

## 1. Self-directed Activities (formerly “drop-in activities”)

A Self-directed Activity is a planned, independent activity available for a definite time period which introduces participating individuals to any of the broad range of library services or activities which directly provide information to participants. 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. Examples of these types of passive activities include DIY stations, 1,000 Books Before Kindergarten, and Frequent Reader Club. This does not include informal services such as homework help. Count all activities, whether held on- or off-site, that are sponsored or co-sponsored by the library. Exclude activities sponsored by other groups that use library facilities.

### 1a. Children Ages 0 to 5 Self-directed Activities

Enter the activities for which the primary audience is children, age 5 and younger. Enter the activity participation for which the primary audience is children 5 and younger.

### 1b. Children Ages 6 to 11 Self-directed Activities

Enter the Number of Young Adult Activities for which the primary audience is 6 through 11 years old. Enter the Activity Participation for which the primary audience are age 6 through 11.

### 1c. Young Adult Self-directed Activities

Enter the Number of Young Adult Activities for which the primary audience is 12 through 18 years old. Enter the Activity Participation for which the primary audience are age 12 through 18.

### 1d. Adult Self-directed Activities

Enter the Number of Adult Activities for which the primary audience is age 19 and older. Enter the Activity Participation for which the primary audience are 19 and older.

### 1e. General Interest (All Ages) Self-directed Activities

Enter the Number of Activities for General Interest (all ages) for which the primary audience is not specific to one age group; i.e., not focused just on children or young adults. Enter the Activity Participation for which the primary audience is not specific to one age group.

1f. Total numbers of self-directed activities and participation are calculated automatically.

## 2. Staff Serving Youth

Please indicate the name(s) and e-mail addresses of staff who serve as the children, youth, or teen librarian(s). If the director serves as the youth librarian, only that name is needed. Please list only paid staff, do not include volunteers. If more than one of your staff serves children, youth, or teens, list the primary staff member on the first line. Note that only information for the primary staff person is included on the printed annual report. Information for additional staff is collected to be used by DPI for correspondence.



Please note that this collection functionality has changed. Users are now able to input as many staff serving youth as necessary. As soon as you enter one of the fields, an additional row will display on the screen. The red "X" on the right side of the row allows you to delete the data entered in that row. The fields above the name and email address provide a running tally of the number of staff serving youth that you've entered in the form.

**2. Staff Serving Youth**

Please indicate the name(s) and e-mail addresses of staff who serve as the children, youth, or teen librarian(s). If the director serves as the youth librarian, only that name is needed. Please list [...more](#)

<b>First Name</b>	<b>Last Name</b>	<b>Email Address</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

**3. Staff Serving Adults**

Please indicate the name(s) and e-mail addresses of staff who serve as the adult librarian(s), focusing on providing services and programs to people aged 18 and up. If the director serves in this capacity, only that name is needed. Please list only paid staff, do not include volunteers. If more than one of your staff provides services and programs to adults, list the primary staff member on the first line. Note that only information for the primary staff person is included on the printed annual report. Information for additional staff is collected to be used by DPI for correspondence.

Please note that this collection is new and the functionality is the same as it now is for Staff Serving Youth. Users are able to input as many staff serving adults as necessary. As soon as you enter one of the fields, an additional row will display on the screen. The red "X" on the right side of the row allows you to delete the data entered in that row. The fields above the name and email address provide a running tally of the number of staff serving adults that you've entered in the form.

**3. Staff Serving Adults**

Please indicate the name(s) and e-mail addresses of staff who serve as the adult librarian(s), focusing on providing services and programs to people aged 18 and up. If the director serves in this [...more](#)

<b>First Name</b>	<b>Last Name</b>	<b>Email Address</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

# Section XIV. Public Library Assurance of Compliance with System Membership Requirements

Review the list of membership requirements (shown below), indicating “Yes” for those that are being met by your library. Requirements that are not marked or indicate “No” (denoting noncompliance) should be brought to the attention of your system immediately. Non-complying libraries must complete steps necessary to attain compliance with all statutory requirements as soon as possible.

- The library is established under [s. 43.52](#) (municipalities), [s. 43.53](#) (joint libraries), or [s. 43.57](#) (consolidated county libraries and county library services) of the Wisconsin Statutes [[s. 43.15 \(4\) \(c\) 1](#)].
- The library is free for the use of the inhabitants of the municipality by which it is established and maintained [[s. 43.52 \(2\)](#), [73 Op. Atty. Gen. 86 \(1984\)](#), and [OAG 30-89](#)].
- The library's board membership complies with statutory requirements regarding appointment, length of term, number of members and composition. [[s. 43.54](#) (municipal and joint libraries), [s. 43.57 \(4\)](#) and [\(5\)](#) (consolidated and county library services), and [s. 43.60 \(3\)](#) (library extension and interchange)].
- The library board has exclusive control of the expenditure of all moneys collected, donated, or appropriated for the library fund [[s. 43.58 \(1\)](#)].
- The library director is present in the library at least 10 hours a week while library is open to the public, less leave time [[s. 43.15 \(4\) \(c\) 6](#)].
- The library board supervises the administration of the library, appoints the librarian, who appoints such other assistants and employees as the library board deems necessary, and prescribes their duties and compensation [[s. 43.58 \(4\)](#)].
- The library is authorized by the municipal governing board to participate in your public library system [[s. 43.15 \(4\) \(c\) 3](#)].
- The library has entered into a written agreement with the public library system board to participate in the system and its activities, to participate in interlibrary loan of materials with other system libraries, and to provide, to any resident of the system area, the same library services, on the same terms, that are provided to the residents of the municipality or county that established the member library. This shall not prohibit a municipal, county, or joint public library from giving preference to its residents in library group programs held for children or adults if the library limits the number of persons who may participate in the group program, or from providing remote access to a library's online resources only to its residents. [[s. 43.15 \(4\) \(c\) 4](#)].
- The library's head librarian holds the appropriate grade level of public librarian certification from the Department of Public Instruction [[s. 43.15 \(4\) \(c\) 6](#) and [Administrative Code Rules PI 6.03](#)].
- The library annually is open to the public an average of at least 20 hours each week except that for a library in existence on June 3, 2006, annually is open to the public an average of at least 20 hours or the number of hours each week that the library was open to the public in 2005, whichever is fewer [[s. 43.15 \(4\) \(c\) 7](#)].
- The library annually spends at least \$2,500 on library materials. [[s. 43.15 \(4\) \(c\) 8](#)].

# Certification

The signatures of the library director and library board president (or other board-authorized officer), certifying this report and its review and approval by the library board, must be provided. [System effectiveness forms](#) signed by the library board of trustees president (or other board-authorized officer) are due by the same date as the annual report, March 1, 2021.

## Statement Concerning Public Library System Effectiveness

In reference to the public library annual report, [Wis. Stat. 43.58 \(6\) \(c\)](#) reads as follows:

The report to the division shall contain a statement by the library board indicating whether the public library system in which the library participated during the year of the report did or did not provide effective leadership and adequately meet the needs of the library and an explanation of why the library board believes so. The division shall design the form of the statement so that it may be removed from the report and forwarded to the division before it is sent to the public library system.

Indicate on the provided statement that the public library system either did or did not provide effective leadership and adequately meet the needs of the library. The library board must approve this statement. The decision about whether the library system did or did not provide effective leadership and adequately meet the needs of the library should be made in the context of the public library system's statutory responsibilities and the funding which it has available to meet those responsibilities. If the library board chooses to submit a negative response, you must provide an explanation of the library board's decision in the space provided.

Indicate the outcome in the online reporting portal and submit the form with the complete report. If the library board chooses, the statement may be indicated only on a separate form, approved, signed, and submitted separately from the rest of the public library annual report. The statement page does not need to be forwarded to your library system with your annual report; however, as a public document, the separate paper statement will be provided upon request to your public library system or others. If the library board chooses this course of action, please choose "Not indicating online" from the dropdown list. Send the signed statement as a scanned PDF to [LibraryReport@dpi.wi.gov](mailto:LibraryReport@dpi.wi.gov).

Division for Libraries and Technology staff compile the statements received for each library system. As required by [Wis. Stat. 43.05 \(14\)](#), the Division will conduct a review of a public library system if at least 30% of the libraries in participating municipalities that include at least 30% of the population of all participating municipalities report that the public library system did not adequately meet the needs of the library.