

Worksheet for the Wisconsin Public Library System Annual Report

Reporting Library System Activities for 2017

This worksheet can be used to compile information before entering library system annual report data into LibPAS. All data entry fields are listed. Subtotal and total fields that are automatically calculated by LibPAS are not listed. Where information is provided by selecting a response from radio buttons or a dropdown list, the choices are shown; e.g., Yes / No.

This worksheet does not replace the online annual report or the printed PDF report and cannot be accepted by the DPI.

System annual report instructions are online at dpi.wi.gov/sites/default/files/imce/pld/pdf/sysannrptinstr.pdf.

For additional information, see dpi.wi.gov/pld/data-reports/annual-report#sys_rpt.

I. GENERAL INFORMATION

1. System Name	
Salutation	Mr. / Ms. / Mrs. / Dr.
2. System Director Name	
3. Certification Grade	Gr1
4. Certification Expiration Date	
5. Street Address	
6. System Phone No.	
7. Fax No.	
8. Mailing Address or PO Box	
9. System Website URL	http://
10. Director's System E-mail Address	
11. City/Village/Town	
12. County	
13. ZIP+4 Code	
14. No. of Public Libraries Participating in the System	
15. Does the system operate a books-by-mail program?	Yes / No
16. No. of Bookmobiles Owned	
17. Estimated System Registered Users	
18. DUNS Number	

II. SYSTEM COLLECTION

1a. Books in Print (end of year total)	
1b. Books in Print Added During Year	
2a. Audio Materials (end-of-year total)	
2b. Audio Added During Year	
3a. Video Materials	
3b. Video Added During Year	
4. System Licensed Electronic Collections (number available to members)	
5. System Licensed E-books	
6. System Licensed Electronic Audio Materials (downloadable)	
7. System Licensed Electronic Video Materials (downloadable)	
8. Subscriptions (Includes periodicals and newspapers, but excludes those in electronic format)	

III. SYSTEM SERVICES

1. Total Annual Circulation		
2a. Items Loaned (provided to)		
2b. Items Received (received from)		
3. Use of System Electronic Resources		
a. Uses of E-Books by Users of Your System	<input type="checkbox"/> Not available	
b. Uses of E-Audio by Users of Your System	<input type="checkbox"/> Not available	
c. Uses of E-Video by Users of Your System	<input type="checkbox"/> Not available	
d. Electronic Collection Retrievals	<input type="checkbox"/> Not available	

IV. SYSTEM BOARD AND ORGANIZATION

System Board President

Salutation	First Name	Last Name	Street Address	City	ZIP Code	Email Address
1. Mr. / Ms.						

System Board Members

Salutation	First Name	Last Name	Street Address	City	ZIP Code	Email Address
2. Mr. / Ms.						
3. Mr. / Ms.						
4. Mr. / Ms.						
5. Mr. / Ms.						
6 Mr. / Ms.						
7. Mr. / Ms.						
8. Mr. / Ms.						
9. Mr. / Ms.						
10. Mr. / Ms.						
11. Mr. / Ms.						
12. Mr. / Ms.						
13. Mr. / Ms.						
14. Mr. / Ms.						
15. Mr. / Ms.						
16. Mr. / Ms.						
17. Mr. / Ms.						
18. Mr. / Ms.						
19. Mr. / Ms.						
20. Mr. / Ms.						
21. Mr. / Ms.						
22. Mr. / Ms.						
23. Mr. / Ms.						

V. PUBLIC LIBRARY SYSTEM INCOME

1. County Government

a. System Member County Appropriations Received by Library System

County Name	Amount
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

b. Other County Payments Received

County Name	Amount
1.	
2.	
3.	
4.	
5.	

2. State Aid to Public Library Systems	
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3. Other State Funded Programs

Description	Amount
a.	
b.	
c.	

4. Federal Aid — Program name and, if LSTA, project number.

Project Number	Program or Project	Amount
a.		
b.		
c.		
d.		
e.		
f.		
g.		
h.		
i.		
j.		

5. Contract Income from Other Governmental Units, Libraries, Library Agencies, Library Systems, etc.

Name	Amount
a.	
b.	
c.	
d.	
e.	
f.	
g.	
h.	
i.	
j.	

6. Other Income

Unexpended State Aid from Previous Year(s)	
Interest Earned from State Aid Funds Investments	
All Other Unexpended Funds from Previous Year(s)	
Interest Earned from Other Fund Investments	
Gifts and Endowments to the System	
All Other Sources	

VI. PUBLIC LIBRARY SYSTEM EXPENDITURES

	System State Aid	Other State and Federal Aid	All Other
1. Salaries and Wages			
2. Employee Benefits			

3. Library Collection Expenditures

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

4. System Contract Expenditures			
5. System Payments to Member Libraries			
6. All Other Operating Expenditures			
7. Total Operating Expenditures			
8. System Capital Expenditures			

VII. SYSTEM MEMBER COUNTY APPROPRIATIONS FOR LIBRARY SERVICE

County Name	2014 Amount
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

VIII. SYSTEM EVALUATION AND CERTIFICATION OF COMPLIANCE

Membership Agreements

(a) Written agreements that comply with s. 43.15(4)(c)4. with all member libraries.	Yes / No
Copies of the most recent agreements have been filed with the Division for Libraries and Technology.	Yes / No

Resource Library Agreement

(b) Backup reference, information, and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.	Yes / No
Signed copies of the 2014 and 2015 resource library agreements have been filed with the division.	Yes / No

Others	Narrative
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Reference Referral and Interlibrary Loan

S. 43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.	Yes / No
Reimbursed member libraries for ILL	Yes / No
Maintained ILL Clearinghouse	Yes / No
Contracted for ILL Clearinghouse	Yes / No
Maintained a shared database of member library bibliographic records and holdings	Yes / No
Utilized WISCAT to promote interlibrary loan	Yes / No
Maintained a system interlibrary loan plan	Yes / No

Others	Narrative
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Other Comments	Narrative
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Inservice Training

S. 43.24(2)(e) Inservice training for participating public library personnel and trustees. Indicate with a check those services carried out by your system in 2014 in conjunction with this service requirement.	Yes / No
Conducted workshops for member library staff and trustees	Yes / No
Maintained a calendar of CE events	Yes / No
Provided scholarships and grants for member library staffs	Yes / No
Maintained a professional collection for system and member library staffs	Yes / No

S. 43.24(2)(h) Professional consultant services to participating public libraries	Yes / No
Public library administration and governance	Yes / No
Adult services	Yes / No
Youth services	Yes / No
Library automation	Yes / No
Building and remodeling	Yes / No
Technical services	Yes / No
Interlibrary loan and resource sharing	Yes / No
Staff development (certification, CE, etc.)	Yes / No
Planning and evaluation, standards	Yes / No
Collection development	Yes / No
Legal issues	Yes / No
Public relations	Yes / No
Reference and information services	Yes / No
Special needs	Yes / No

Others	Narrative
Other Comments	Narrative

Delivery and Communication

S. 43.24(2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.	Yes / No
Had regular courier or van delivery service	Yes / No
Provided an 800 number, phone credit card, or accepted collect calls	Yes / No

ILL transactions sent by:

Email	Yes / No
OCLC	Yes / No
Regional automated system	Yes / No
WISCAT	Yes / No

Used fax for document delivery/communication	Yes / No
Used mail as primary delivery system	Yes / No
Published a newsletter	Yes / No

Others	Narrative
Other Comments	Narrative

Service Agreements

S. 43.24(2)(g) Service agreements with all adjacent library systems	Yes / No
Copies of the most recent agreements have been filed with the Division for Libraries and Technology.	Yes / No
Reciprocal borrowing between systems	Yes / No
Cash payments in cross-system lending	Yes / No
Continuing education	Yes / No
Delivery	Yes / No
Newsletter exchange	Yes / No
Cooperative planning/information exchange	Yes / No
Audiovisual services	Yes / No

Cooperative purchasing	Yes / No
Others	Narrative
Other Comments	Narrative
Services to Users with Special Needs	
S. 43.24(2)(k) Promotion and facilitation of library service to users with special needs	Yes / No
Summary of Services or Initiatives	Narrative
Agencies with which the system had the most contact	Narrative
Continuing Education	Narrative
Other Comments	Narrative
Other Types of Libraries	
S. 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.	Yes / No
An advisory committee or planning group including representatives from other types of libraries met and established objectives relating to this requirement for the plan year.	Yes / No
The system has agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. Copies of the most recent agreements have been filed with the Division for Libraries and Technology.	Yes / No
Consultation	Yes / No
Continuing education / workshops	Yes / No
ILL (Direct)	Yes / No
Union list of serials	Yes / No
Directory of libraries	Yes / No
Delivery services	Yes / No
Back-up reference services	Yes / No
Newsletter	Yes / No
Technical services	Yes / No
Others	Narrative
Other Comments	Narrative

Library Technology and Resource Sharing Plan

S. 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every 5th January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.	Yes / No
Member public libraries and other types of libraries in the system area had an opportunity to review and comment on the plan.	Yes / No
The public library system's current technology and resource sharing plan has been filed with the Division for Libraries and Technology.	Yes / No

Other Service Programs

S. 43.24(2)(i) Any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the public library board after consultation with participating public libraries.	Yes / No
Other Service Programs	Narrative

Administration

The system did not expend more than 20 percent of the state aid received in 2014 for administration	Yes / No
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IX. COLLABORATIVE ACTIVITIES

Summary of Collaborative Activities		Narrative
Activity	Amount	
1.		
2.		
3.		
4.		
5.		
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9.		
10.		

X. PUBLIC LIBRARY SYSTEM ANNUAL PROGRAM EXPENDITURES—2014

Program	System Aid, Carryover, and Interest Earned	Other State and Federal Library Program Funds	All Other Income
Technology, Reference and Interlibrary Loan			
1.			
2.			
3.			
4.			
Continuing Education and Consulting Service			
1.			
2.			
Delivery			
Library Services to Special Users			
Library Collection Development			
Direct Payment to Members for Nonresident Access			
Direct Nonresident Access Payments Across System Borders			
Library Services to Youth			
Public Information			
Administration			
Other System Programs			
1.			
2.			
3.			
4.			

XI. SYSTEM STAFF (FTE)

1. Personnel Listing

a. Employees Holding the Title of Librarian as of December 31, 2014

First Name	Last Name	Position	Type of Staff	Annual Salary	Hours Worked/Week
1.		Director	MLS (ALA) / No MLS		
2.			MLS (ALA) / No MLS		
3.			MLS (ALA) / No MLS		
4.			MLS (ALA) / No MLS		
5.			MLS (ALA) / No MLS		
6.			MLS (ALA) / No MLS		
7.			MLS (ALA) / No MLS		
8.			MLS (ALA) / No MLS		
9.			MLS (ALA) / No MLS		
10.			MLS (ALA) / No MLS		
11.			MLS (ALA) / No MLS		

b. Other Paid Staff

Position	Annual Salary	Hours Worked/Week
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
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23.		
24.		

XII. SYSTEM MEMBERSHIP

Are the public library members established under the provisions of Chapter 43 of the Wisconsin Statutes? [s. 43.15(4)(c)1]	Yes / No
Are the public library members authorized by the municipal governing board to participate in the public library system? [s. 43.15(4)(c)3]	Yes / No
Have the library members maintained a written agreement to participate in the library system, ILL, and provide "same services"? [s. 43.15(4)(c)4]	Yes / No
Are the member libraries' head librarian certified at the appropriate grade level? [s. 43.15(4)(c)6 and Administrative Code Rules PI 6.03]	Yes / No
Have all counties participating in the system entered into written agreements with the system? [s. 43.15(4)(b)3]	Yes / No
Have all counties participating in the system adopted and maintained the plan of library service submitted and approved under s. 43.11(3) and s. 43.13(1)? [s. 43.15(4)(b)1]	Yes / No
Is each public library member open to the public an average of at least 20hrs/wk? [s. 43.15(4)(c)7]	Yes / No
Does each public library member annually spend at least \$2,500 on library materials? [s. 43.15(4)(c)8]	Yes / No

XIII. CERTIFICATION OF STATUTORY COMPLIANCE

Is the library system board constituted and operated in compliance with s. 43.17(1) and (2) and s. 43.19(1)(a) and (b)?	Yes / No
Has the library system board appointed a head librarian who is responsible for administration of the public library system? [s. 43.17(4)]	Yes / No
Is the library system organized and operated in compliance with Wis. Stat. s. 43.15 Standards for public library systems?	Yes / No

S. 43.24(2) For a public library system to qualify for and maintain its eligibility for state aid under this section, it shall ensure that all of the following are provided.

Does the system have written agreements that comply with s. 43.15(4)(c)4. with all member libraries?	Yes / No
Does the system provide backup services from the system resource library? [s. 43.24(2)(b)]	Yes / No
Does the system refer or route reference and interlibrary loan requests? [s. 43.24(2)(d)]	Yes / No
Does the system provide inservice training? [s. 43.24(2)(e)]	Yes / No
Does the system deliver electronic information and physical library materials? [s. 43.24(2)(fm)]	Yes / No
Does the system have service agreements with all adjacent library systems? [s. 43.24(2)(g)]	Yes / No
Does the system provide professional consultant services? [s. 43.24(2)(h)]	Yes / No
Does the system provide other service programs designed to meet library and resident needs? [s. 43.24(2)(i)]	Yes / No
Does the system promote and facilitate library services to users with special needs? [s. 43.24(2)(k)]	Yes / No
Does the system cooperate and plan with other types of libraries for sharing resources? [s. 43.24(2)(L)]	Yes / No
Does the system plan with the division and libraries about library technology and sharing resources? [s. 43.24(2)(m)]	Yes / No
Does the system reimburse no more than actual costs to libraries that provide interlibrary borrowing services to individuals from another library? [s. 43.24(2)(n)]	Yes / No