

ANNUAL REPORT

IMLS ~ Public Library Survey

Webinar: Annual Report Sections E-G

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LOGIN Username & Password

Quick Review

For this information contact Bobbie Augspurger, SDC bobbie.augspurger@ky.gov

Collect Baker -Taylor provides this Annual Report Survey Portal https://collectconnect.baker-taylor.com/login.aspx

Connect Baker -Taylor provides this Annual Report Data Portal https://collectconnect.baker-taylor.com/Connect/Login.aspx



Quick Review



Navigate to next page



Navigate to previous page



Save most recent changes

SAVE OFTEN The system will time-out after work delays

You may need to Log Back In to make sure your work is really being saved



Hide responses provided previous year

Recommend SEEING Last Year's Answers

If there is a notable difference, you will need to provide a Note as to WHY

. . . Why the number is so much bigger or smaller



Quick Review



1) Population of legal service area should not be less than or equal to 0. Please explain why your data is outside of the normal range using the Federal note.

Note: This is what a working Error Check looks like. At Survey Submission a separate Error Report will be generated.

B&T Collect Annual Report Screenshot

Question you have, Question your Regional has, Question SDC has

FLAG FLAG Flag Red Flag is used to indicate a Question . . .



Note Each survey question has the Note feature.

Each Note is a gift to your future self, to the Regional, and to the SDC explaining the "WHY"

- Why is the number so much bigger or smaller
- What specifically caused this number to notably change from last fiscal year Error Reports - When library submits the completed survey, an Error Report is generated. Each library must validate submitted data and justify the Why & What in order to move forward in the submission process. When SDC submits the state of Kentucky data for All

Libraries, the SDC must validate all submitted data and justify the Why & What in order to move forward in the **Federally Required Public Library Survey** process. The Error Reports

can be different between the library submission in Collect and the SDC submission of PLS.



History History feature shows the response given by year for the last 5 years.



Quick Review



Status Status Screen shows: Edit checks, Unanswered questions, & Flagged questions.



Export Automatically downloads your Annual Report data "as is"



Print Set Printing Preferences for "Survey Reports" or "Annotation Reports" Here are my Printing Preferences . . .

Print Entire Survey - Include Annotations - With Current & Last Year's Data - Show PDF Report

SURVEY LIST

Survey List Provides a list of previous Annual Report Surveys for your Library



Submit Library will Complete Survey before Submitting.

Library must address all Error Checks before Survey will fully submit.

DASHBOARD

Dashboard Regionals this is your Home Base Screen for all libraries in your region.

select "REVIEWED" after reviewing library data and addressing data discrepancies select "UNLOCK/RELOCK" when Libraries Add Notes/Rework data/etc. select "APPROVED" when Library Data/Notes are correct & all Error Checks are addressed.

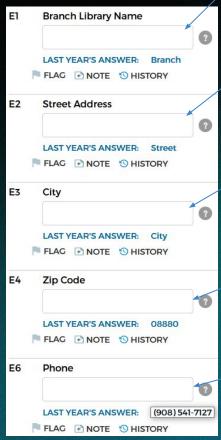
Close

Close This will Close Survey Window . . . be sure to SAVE first









Branch Library Name. This is the name of the branch.

Street Address This is the complete street address of the branch. Note: Do Not report a post office box or general delivery.

City or town in which the branch is located

This is the standard five-digit postal zip code for the street address of the branch

Phone This is the telephone number of the branch

DEFINITION

A branch library is an auxiliary unit of an administrative entity which has at least ALL of the following:

- 1. Separate quarters
- An organized collection of library materials
- 3. Paid staff, and
- Regularly scheduled hours for being open to the public.

NOTICE: You can choose to show LAST YEAR'S ANSWER, which is a quick way to ballpark information check & see if a Note or Data check is needed.

This is the area on all floors enclosed by the outer walls of the library. Include all areas occupied by the branch library, including those areas off-limits to the public. Include any areas shared with another agency or agencies if the outlet has use of that area

Number of Meetings Held. Enter the number of meetings which were held in the meeting room. Do **not** include use of the room for library programs or service or other use by library boards or staff.

This is the total number of persons entering the branch library for whatever purpose during the year. Note: If an actual count of visits is unavailable, determine an annual estimate by counting visits during a typical week in October and multiplying the count 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 the library. Choose a week in which the library is open its regular hours. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open). Count only physical visits, not electronic or cyber-visits.

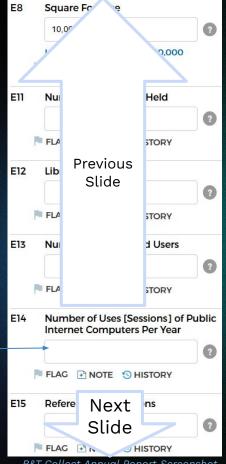
Enter the number of current registered users if separate statistics are kept for branches. A registered user is a library user who has applied for and received an identification number or card from the public library that has established conditions under which the user may borrow library materials and gain access to other library resources. (Output Measures for Public Libraries, 2nd edition). Note: Files should have been purged within the past three (3) years. Include the count of Digital Access Cards if this is available.



B&T Collect Annual Report Screenshot

Report the total number of uses (sessions) of the library's Internet computers in the library during the last year. If the computer is used for multiple purposes (Internet access, word-processing, OPAC, etc.) and Internet uses (sessions) cannot be isolated, report all usage. A typical week or other reliable estimate may be used to determine the annual number. Sign-up forms or Web-log tracking software also may provide a reliable count of uses (sessions).

Note: This count includes only the library's Internet computers. Do **not** include wifi access using nonlibrary computers. The number of uses (sessions) may be counted manually, using registration logs. Count each use (session) for public internet computers, regardless of the amount of time spent on the computer. A use (session) on the library's public internet computer(s)three times a year would count as three uses (sessions). Software such as "Historian" can also be used to track the number of uses (sessions) at each public internet computer. If the data element is collected as a weekly figure, multiply that figure by 52 to annualize it.



B&T Collect Annual Report Screenshot

BRANCH LIBRARIES: See "Recognizing Reference Questions in a 21st Century Library" Webinar Section E

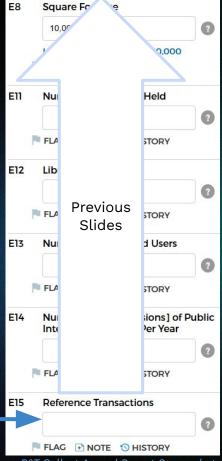
Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements.

NOTES:

- 1. A reference transaction includes information and referral service, scheduled and unscheduled individual instruction and assistance in using information sources (including websites and computer-assisted instruction).
- 2. Count Readers Advisory questions as reference transactions.
- 3. Information sources include (a) printed and nonprinted material; (b) machine-readable databases (including computer-assisted instruction); (c) the library's own catalogs and other holdings records; (d) other libraries and institutions through communication or referral; and (e) persons both inside and outside the library.
- 4. 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.
- 5. If a contact includes both reference and directional services, it should be reported as one reference transaction.
- 6. Duration should not be an element in determining whether a transaction is a reference transaction.
- 7. Do not include transactions that include only a directional service, such as 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 restroom? Where are the 600s? Can you help me make a photocopy?"

Annual Count vs. Annual Estimate

- *If an annual count of reference transactions is unavailable, count reference transactions during a typical week or weeks, and multiply the count to represent an annual estimate.
- *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 a week in which the library is open its regular hours.
- *Example: If there are four weeks sampled, multiply the totals for those four weeks by 13 to get an estimate for the full year. If the sample is done twice a year (one week at each time, two weeks total) multiply the count by 26 to get the estimated annual count.



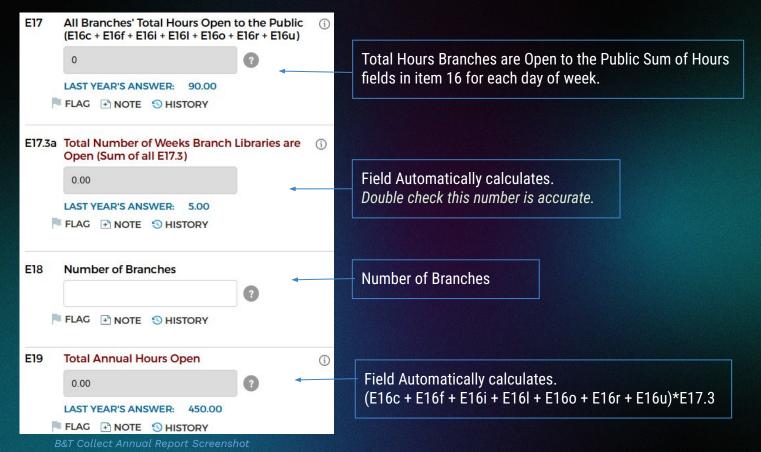
B&T Collect Annual Report Screenshot

Hours Open to the Public Enter the time the branch opened and closed and the total number of hours the branch was open for each day of the week.

E16a	Sunday Opening Time		E16g Tuesday Opening Time		E16m Thursday Opening Time		
		?		3		2	B&T Collect Annual Report Screenshot
	FLAG NOTE SHISTORY		FLAG NOTE SHISTORY		FLAG NOTE SHISTORY		E16s Saturday Opening Time
							0
E16b	Sunday Closing Time		E16h Tuesday Closing Time		E16n Thursday Closing Time	_	FLAG • NOTE • HISTORY
		•		0		•	
	FLAG NOTE SHISTORY		FLAG PNOTE SHISTORY		FLAG • NOTE • HISTORY		E16t Saturday Closing Time
E16c	Harris		FIG. House		E160 Hours		•
	Hours		E16i Hours		Eloo Houis		FLAG → NOTE SHISTORY
		0		0		0	E16u Hours
	FLAG NOTE SHISTORY		FLAG NOTE SHISTORY		FLAG → NOTE SHISTORY		2
E16d	Monday Opening Time		E16j Wednesday Opening Time		E16p Friday Opening Time		FLAG → NOTE SHISTORY
		2		0		0	
	FLAG NOTE SHISTORY		FLAG NOTE SHISTORY		FLAG P NOTE SHISTORY		E17.3 Number of Weeks Branch Library is Open
			1-1000000000000000000000000000000000000				2
E16e	Monday Closing Time	_	E16k Wednesday Closing Time		E16q Friday Closing Time	_	FLAG → NOTE SHISTORY
		•		0		0	
	FLAG • NOTE • HISTORY		FLAG NOTE SHISTORY		FLAG → NOTE SHISTORY		REMOVE GROUP ADD GROUP
E16f	Hours		E16I Hours		E16r Hours		
		0		0		•	Remove Group = Add Group =
	FLAG NOTE SHISTORY		FLAG NOTE SHISTORY		FLAC → NOTE SHISTORY		Remove Branch Add Branch

BRANCH LIBRARIES:

Section E



12





Q: We opened the XX Branch on March 4, 2024. Does a branch section need to be added to our 2023-24 Annual Report, or should I just include a description in notes in the "S" section?

A: You will need a new branch section added. If a library already has a branch and needs to add a new one, they can just add a new branch on their report themselves. If the library does not already have a branch, SDC must request that the branch section be added to the county report.

Q: Had almost completed the Annual Report and then noticed that previously input information for the XX and XX branches are no longer there. It is not that the fields are empty, those branches are not shown at all.

A: Contact the SDC, who will reach out to B&T. SDC will let the Public Library know updates on the situation.

Q: Branch versus self-serve model, does XX meet branch requirements?

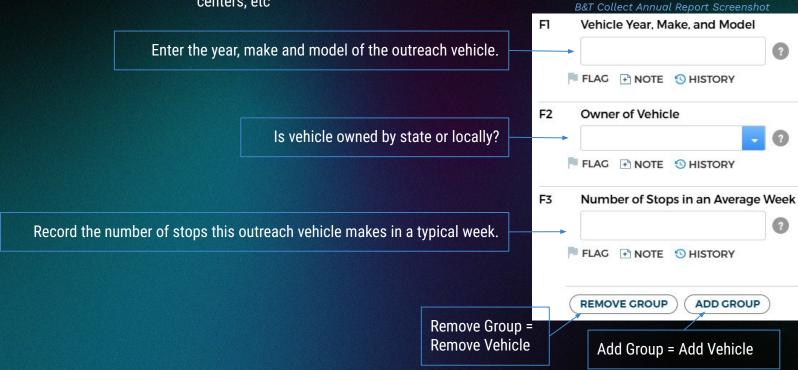
A: See listed Branch Requirements (all must be present to be considered a branch).

The XX information reported should represent ONLY that Branch and not include the main library data.

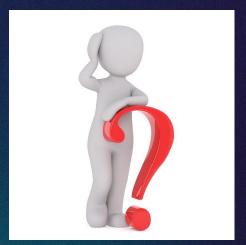
OUTREACH VEHICLES: Section F

DEFINITION:

An outreach vehicle is a vehicle used principally to provide personalized library services to individuals and groups at remote locations. The vehicle does **not** have an organized collection separate as in the case of a bookmobile. Staff will deliver and pick-up library materials specifically for patrons who are for any reason unable to visit the library in person. An outreach vehicle may also be used for programming at daycare centers, schools, senior centers, etc







OUTREACH VEHICLE: Section F

Q: We use our bookmobile to also do outreach activities. How do I count these? A: Do not duplicate Outreach Vehicle Activities and Bookmobile transactions. The vehicle can only count once. The actions/activities can only count once. So if vehicle counts as a Bookmobile, you will count data as Bookmobile data. This means these uncounted Outreach activities may need to be counted in your Programs section or as a separate measure in Section M. Data will only count once in the report - so look at the section definitions to determine best fit.

Q: Our Librarian uses her own personal vehicle for outreach. Can we count that vehicle in Section F?

A: In the past you may have counted personal vehicles as outreach vehicles. Moving forward, count only vehicles owned by your local entity or the state - not an individual.

Q: We acquired an outreach vehicle on April 1, 2024. Does an Outreach Vehicle section need to be added to our 2023-24 Annual Report, or should I just include a description in notes in the "S" section?

A: You will need a new Outreach Vehicle section added. If a library already has an outreach vehicle and needs to add a new one, they can just add a new one by clicking "Add Group" on their report themselves. If the library does not already have an outreach vehicle, SDC may need to request that the section be added to the county report.

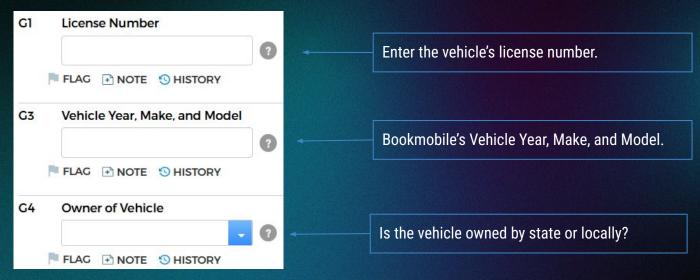
Definition

A bookmobile is a traveling branch library. It consists of at least all of the following:

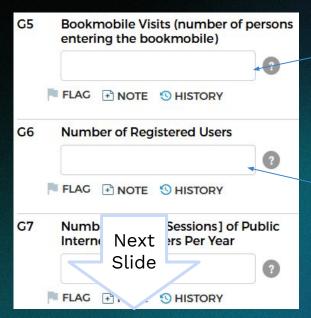
- 1. a truck or van that carries an organized collection of library materials;
- 2. paid staff; and
- 3. regularly scheduled hours (bookmobile stops) for being open to the public.

INFORMATION FOR EACH BOOKMOBILE:

Add a new group for each bookmobile in the county.



B&T Collect Annual Report Screenshot

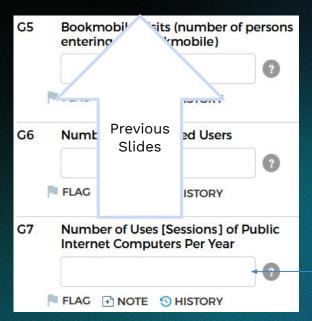


B&T Collect Annual Report Screenshot

This is the total number of persons entering the bookmobile for whatever purpose during the year. Note: If an actual count of visits is unavailable, determine an annual estimate by counting visits during a typical week in October and multiplying the count 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 the bookmobile. Choose a week in which the bookmobile is open its regular hours. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open).

Enter the number of current registered users if separate statistics are kept for bookmobiles. A registered user is a library user who has applied for and received an identification number or card from the public library that has established conditions under which the user may borrow library materials and gain access to other library resources. (Output Measures for Public Libraries, 2nd edition). Note: Files should have been purged within the past three (3) years

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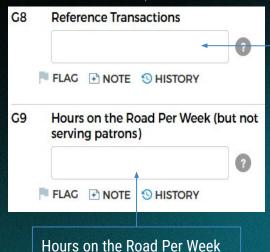
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B&T Collect Annual Report Screenshot



(but **not** serving patrons)

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Annual Count vs. Annual Estimate

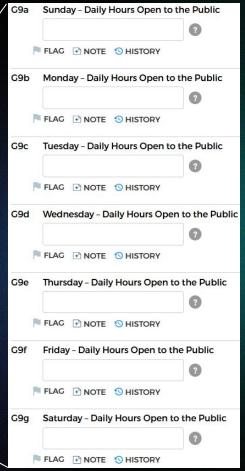
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Definition

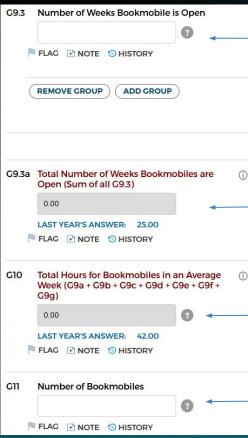
Bookmobile Hours (G9a-G9g) - Count only the daily hours during which the bookmobile is open to the public.

Do not count travel time. Hours on the road per week is reported in item number G9

Sunday - Daily Hours Open to the Public
Monday - Daily Hours Open to the Public
Tuesday - Daily Hours Open to the Public
Wednesday - Daily Hours Open to the Public
Thursday - Daily Hours Open to the Public
Friday - Daily Hours Open to the Public
Saturday - Daily Hours Open to the Public
Sunday - Daily Hours Open to the Public



B&T Collect Annual Report Screenshot



This is the number of weeks during the year that the bookmobile was open to the public. Count only the weeks during which the bookmobile is open to the public. The count should be based on the number of weeks that a library outlet was open for half or more of its scheduled service hours.

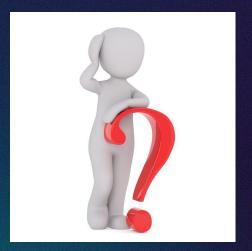
Extensive weeks closed to the public due to natural disasters or other events should be excluded from the count. Do not calculate based on total number of service hours per year at the outlet level. For example, by dividing total hours by the average hours open per week. Round to the nearest whole number of weeks. If the bookmobile was open half or more of its scheduled hours in a given week, round up to the next week. If the library was open less than half of its scheduled hours, round down.

This field automatically calculates = Read-only data the total number of weeks ALL Bookmobiles are Open (so it may be more than 52).

This field automatically calculates = Read-only data Sum of Hours fieldon line G9, for each day of the week.

This is the total number of Bookmobiles





Pro Tip:

Maintenance Schedule should include regular system updates on Registered Users

BOOKMOBILES: Section G

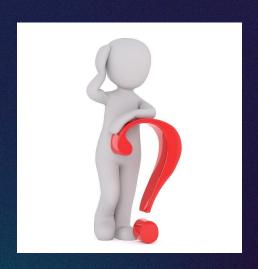
Q: What does it mean by Registered Users?

A: Registered Users means cardholders. This number should not be the same as your county population. Be aware the instructions state that Registered Users should be updated at minimum every 3 years, which means deleting or archiving the unused/old accounts in your system. This number may include people living outside the county who have purchased your library card.

Q: We use our bookmobile to also do outreach activities. How do I count these? A: Do not duplicate Outreach Vehicle and Bookmobile. The vehicle can only count once. So it if counts as a Bookmobile, you will count all data as Bookmobile data.

Q: We acquired a new bookmobile on March 1, 2024. Does a Bookmobile section need to be added to our 2023-24 Annual Report, or should I just include a description in notes in the "S" section?

A: You will need a new Bookmobile section added. If a library already has a Bookmobile and needs to add a new one, they can just add a new one by clicking "Add Group" on their report themselves. If the library does not already have a bookmobile, SDC may need to request that the section be added to the county report.



Any Other Questions?

Email Your Regional Consultant

- Chris.Bischoff@ky.gov
- Jeff.Gurnee@ky.gov
- Caleb.Conover@ky.gov
- Amber.Potts@ky.gov
- ➤ Wendy.OConnor@ky.gov

Email Your State Data Coordinator

bobbie.augspurger@ky.gov

Upcoming Webinar in April . . .

Annual Report Sections H-J





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