2019 Texas Public Libraries Annual Report Success!

Valicia Greenwood,
Library Statistics Specialist/State Data Coordinator

Texas State Library and Archives Commission
Library Development and Networking Division
April 2020
Today’s Plan

Due Dates
Submission Issues
Accreditation “Mysteries”
Report Questions
Accreditation Benefits
Pandemic Impact
Due Dates

All reports are locked on April 30, 2020.

Revisions can be made up until July 31, 2020.

After July 31, no changes will be accepted.
Application for Accreditation

This form must be completed by and submitted on or before April 30, 2020.

Library Name ____________________________ City ____________________________

Certification

The below signed certify, to the best of their ability, that the information contained in the library’s annual report is complete and accurate for local fiscal year 2019.

All applicable signatures are necessary, based on library’s legal establishment.

Must be submitted by April 30, 2020!
Resources

Public Library Accreditation and Statistics

Texas Public Libraries Annual Report

Texas LibPAS, the data collection portal for the Texas Public Libraries Annual Report, is open for data entry. Log-in credentials were sent out in early January. If library staff has changed, or the log-in information was not received, please contact us at accreditation@tsl.texas.gov.

We encourage you to submit the library's report by the end of March, to allow staff sufficient time to review the information. The report is due by Thursday, April 30, 2020, per 13 TAC 51.85. That's per 13 TAC 51.85.

Application and Accreditation Forms

Texas LibPAS - All reports must be submitted through this online data collection portal.

Instructions for using the online form (PDF)

Annual Report Blank Worksheet for Local Fiscal Year 2019 (PDF)

2019 Application Form for Accreditation in State Library System
Word format | PDF format

https://www.tsl.texas.gov/ldn/annualreport
Where to Start

Texas LibPAS [https://tx.countingopinions.com/]
Where to Start

Log-in information does not change from year to year.

Username and passwords are not case-sensitive, and any "0" is a zero, not the letter O.
Submit the Report

1. Verify
2. Submit/Lock
Reports are analyzed through a computer program.
Perform 60 tests of the data.
Mathematical check of results.
Runs a comparison to minimum accreditation criteria.
This analysis is NOT:

Personal (does not like or dislike)

An evaluation of the library

An evaluation of service provided in your community
Add Notes!

“OK”

“Don’t know”

“Same”
Edit Checks

- Gift to future self
- Document and save what you are doing
- Form of analysis
- Call attention: why the difference?
Edit Checks

A value is required!

Data Input

Save | Reset | Previous | Next | Recalculate

Texas Public Libraries Annual Report

Period: 2019
Add a note or review the amounts.
No judgement: mathematical check. Add a note explaining that amounts have been checked and verified.
Library Operating Expenditures

Staff Expenditures
- Wages/Salaries
- Benefits

Collection Material Expenditures
- Print Materials
- Electronic Materials

Other Operating Expenditures
- Fees
- Supplies
- Services
- Utilities
Capital Expenditures

- Land Purchase
- Building Purchase
- Renovation Costs
- New Vehicles
- Computer Servers
- Library Automation System
- Opening Day Collection
- One-Time Major Projects

*Check with local governing authority for capitalization level or local accounting practice.
Library Operating Expenditures

- 3.3 Staff Expenditures
- 3.7 Collection Material Expenditures
- 3.8 Other Operating Expenditures
- 3.9 Total Direct Operating Expenditures
Local Operating Expenditures

4.2 Total Local Operating Expenditures

- Non-local grant funds

4.1 Local Collection Material Expenditures

4.3 Local Government Operating Expenditures
Local Operating Expenditures

4.2 Total Local Operating Expenditures

4.1 Local Collection Material Expenditures

4.3 Local Government Operating Expenditures

Non-local grant funds

Non-local grant funds
3.3a Staff
3.7a Collections
3.8a Other
Non-Local Grant Funds

Federal Funds

Foundation or Corporate Funds

State Funds
Local Operating Expenditures

4.2 Total Local Operating Expenditures

4.1 Local Collection Material Expenditures

4.3 Local Government Operating Expenditures
Local Operating Expenditures

4.2 Total Local Operating Expenditures

4.1 Local Collection Material Expenditures

4.3 Local Government Operating Expenditures
Including Indirect Costs*

4.2 Total Local Operating Expenditures

4.1 Local Collection Material Expenditures

3.10 Indirect Costs*

4.3 Local Government Operating Expenditures

*Only if needed to meet MOE or Local Government Support criteria
Maintenance of Effort (MOE)

Local operating expenditures (4.2) must meet or exceed this amount.

Demonstration of local financial effort and support.

In administrative rules: 13 TAC §1.74.
Maintenance of Effort (MOE)

Calculated two ways. Library must meet lower of two amounts

Uses 3-year average

Exemption amount
## MOE

### Simple Average

Local Library Operating Expenditures (4.2) for previous three years:

<table>
<thead>
<tr>
<th>Year</th>
<th>Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$17,059</td>
</tr>
<tr>
<td>2017</td>
<td>$17,734</td>
</tr>
<tr>
<td>2018</td>
<td>$18,564</td>
</tr>
</tbody>
</table>

**Sum:** $53,357
MOE
Simple Average

Add together and divide by 3.

$53.357/3 =

MOE 2019 $17,785.6667
Per Capita Operating Expenditures

Total Local Operating Expenditures (4.2)

\[
\frac{\text{Total Local Operating Expenditures}}{\text{Population Assignment}} = \text{Per Capita Local Operating Expenditures}
\]
MOE
Per Capita Average

Calculation:

<table>
<thead>
<tr>
<th>Year</th>
<th>4.2</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$17,059</td>
<td>3,571</td>
</tr>
<tr>
<td>2017</td>
<td>$17,734</td>
<td>3,601</td>
</tr>
<tr>
<td>2018</td>
<td>$18,564</td>
<td>3,645</td>
</tr>
<tr>
<td>Total</td>
<td>$53,357</td>
<td>10,817</td>
</tr>
</tbody>
</table>
MOE
Per Capita Average

Calculate per capita $53,357/10,817 = $4.9326985

Multiply by current population $4.9326985 * 3,678 =

MOE 2019 $18,142.47

Unless population is decreasing, this estimation will always be higher.

Library must meet lower of two amounts
Exemption from MOE

Local operating expenditures (4.2) of at least $150,000
AND
$17.50 per capita
If MOE is NOT met?
1. Review Expenditures

Has everything been included?
2. Include Indirect

Has anything been paid on the library’s behalf?

*Must come from local government source
Present at Library Systems Act Advisory Board meeting in June.

3. Appeal
Other Accreditation Issues
“All or Nothing”

• Local government support
• Statewide interlibrary loan (ILL)
• Long range plan*
• Librarian/Director earned 10 CEU’s*
• Website

*these are most common criteria generating appeal
If only one is not met...

- One item per capita, 7,500 items, or 15% of budget on collections.
- Minimum per capita expenditures.
- Required number of professional librarians.
- Required number of hours director employed in library duties.
- Required number of hours open.

...can be on probation for up to three years.
Reporting Electronic (Downloadable) Materials

INCLUDE IN ANNUAL REPORT

Is user authentication required?

YES
If a library card number is required for use, include in the Annual Report.

NO
If the item is in the public domain (LibriVox, Project Gutenberg), do not include in the Annual Report.

INCLUDE IN COLLECTION COUNTS Section 6

What is the ownership or payment model?

PAY-PER-UNIT
Count all units to which patrons have access whether local- or consortium-acquired. eBooks (6.7), Audio (6.8) or Video (6.9) downloads such as OverDrive or 3M.

PAY-PER-USE
Count only circulated items for eBooks (6.7), Audio (6.8) or Video (5.9) downloads such as Hoopla, whether acquired locally or cooperatively.

NO LOAN PERIOD
Count as an Electronic Collection/Database; whether Locally (6.10) or Cooperatively Acquired (6.12). Include uses in Electronic Retrieval.

INCLUDE IN CIRCULATION Section 7

Is there a loan period?

YES
Count as Circulation: Children’s Electronic Circulation (7.5) and All Other Electronic Circulation (7.7)

NO
Count in Electronic Retrieval (new question)
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INCLUDE IN CIRCULATION?
Section 7

Is there a loan period?

YES
- Count as Circulation: Children’s Electronic Circulation (7.5) and All Other Electronic Circulation (7.7);

NO
- Count in Electronic Retrieval (new question 7.9)
Programming/Attendance

Report number of events

Report all in attendance, regardless of age

Target age range

<table>
<thead>
<tr>
<th>Category</th>
<th>Age Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children</td>
<td>Age 11 years and younger</td>
</tr>
<tr>
<td>Young Adult</td>
<td>Age 12 through 18 years</td>
</tr>
<tr>
<td>Adults</td>
<td>Age 19 years and older</td>
</tr>
</tbody>
</table>
Reporting Programs

**INCLUDE IN ANNUAL REPORT**

**YES**
- Planned and advertised in advance.
- Content is the library, its resources, or its services.
- Library presents or facilitates program.
- Open to more than one person.

**NO**
- Library Board meetings
- Library booth at a festival or parade
- Drop-in format open house
- Drop-in art exhibit

**INCLUDE IN PROGRAM COUNTS**

**EXAMPLES**
- Storytime
- Formal computer classes
- Family game nights
- Movie nights
- Organized book groups/clubs
- Planned author visits
- Library-sponsored demonstrations
- Library tours

**WHAT TO COUNT**
- Each event = one program
  
  *(example: 12-week class = 12 programs)*
- All planned programs, regardless of attendance.
- All attendees, regardless of intended audience:
  - Children’s programming (7.9/7.10)
  - Young Adult programming (7.11/7.12)
  - Adult programming (7.13/7.14)
  
  *(whichever is best fit)*

**OTHER TYPES OF EVENTS**

<table>
<thead>
<tr>
<th>FOR</th>
<th>COUNT AS</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-on-one training</td>
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</tr>
<tr>
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<td>Circulation of materials (7.4/7.6)</td>
</tr>
<tr>
<td>Local business meeting at library</td>
<td>Library visits (7.2)</td>
</tr>
<tr>
<td>Library as polling place (voters)</td>
<td>Library visits only if entering library space</td>
</tr>
<tr>
<td>Non-profit volunteers tutoring</td>
<td>Library visits – students and tutors</td>
</tr>
<tr>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>-----</td>
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## INCLUDE IN PROGRAM COUNTS

### Section 7

### EXAMPLES

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(example: 12-week class = 12 programs)

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Wi-Fi Sessions

Wireless connection to the library’s internet, patrons using a personal laptop, tablet, or smart phone

• Report amount obtained from router software.
• If data is not being collected, report 0.
Wi-Fi Sessions

• Total Number of Sessions For Year
• Do not include use of library equipment in the count.
• Can estimate from weekly or monthly total.
Visits = number of sessions initiated by all users from inside or outside the library to the library website.

Usage of library social media accounts (e.g., Facebook, Twitter, etc.) should not be reported here.

Use Google Analytics or similar software
Count total annual usage during local fiscal year.

Annotate amount if using estimate from weekly or monthly totals.

PLOUD users contact Technology Consultant Henry Stokes for amounts.  hstokes@tsl.texas.gov
Unduplicated Hours

Only for libraries with branches
**Weekly Total Tool**

### Weekly Total Hours Calculator

- **COMPOSITE NUMBER OF HOURS**

<table>
<thead>
<tr>
<th>TIME</th>
<th>SUN</th>
<th>MON</th>
<th>TUES</th>
<th>WED</th>
<th>THUR</th>
<th>FRI</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 - 8:00 a.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8:00 - 9:00 a.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9:00 - 10:00 a.m.</td>
<td>0.50</td>
<td>1.00</td>
<td>0.50</td>
<td>1.00</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>10:00 - 11:00 a.m.</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>0.50</td>
</tr>
<tr>
<td>11:00 - 12:00 p.m.</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>12:00 - 1:00 p.m.</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>1:00 - 2:00 p.m.</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>2:00 - 3:00 p.m.</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>0.50</td>
<td>1.00</td>
</tr>
<tr>
<td>3:00 - 4:00 p.m.</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td></td>
<td>1.00</td>
</tr>
<tr>
<td>4:00 - 5:00 p.m.</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td></td>
<td></td>
<td>1.00</td>
</tr>
<tr>
<td>5:00 - 6:00 p.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
</tr>
<tr>
<td>6:00 - 7:00 p.m.</td>
<td></td>
<td></td>
<td>1.00</td>
<td></td>
<td></td>
<td>1.00</td>
</tr>
<tr>
<td>7:00 - 8:00 p.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
</tr>
<tr>
<td>8:00 - 9:00 p.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>9:00 - 10:00 p.m.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DAILY TOTALS</strong></td>
<td>0.00</td>
<td>7.50</td>
<td>12.00</td>
<td>7.50</td>
<td>12.00</td>
<td>5.50</td>
</tr>
</tbody>
</table>

*Key:*
- Only Main open
- Only branches open
- Both open

*Do not count any hour twice!*
Section 12

Only for libraries with branches

Basic Contact Information
Service hours of each branch
Square footage of each branch
Next Year?

Track days the library is closed to the public and days that staff works in the building.

Contact vendors to track the wi-fi and e-resources usage.
Next Year?

Track the number of online/virtual events.

Track number of virtual attendees that you can independently verify.
- NOT the number of Facebook “likes” or shares.
Success!
Advantages

Voluntary local decision
Criteria from library peers
Promote financial stability
Advantages

Community assurance

National picture of libraries

Visibility

Benefits!
Any Library Completing the Texas Public Libraries Annual Report
Edge Assessment

National coalition of libraries, local government and non-profits.

Provides tool which aligns technology to community priorities.

http://www.libraryedge.org/

Guides libraries to set goals for digital inclusion

TSLAC goal: 100% Texas Public Library participation

Contact Technology Consultant Cindy Fisher
cfisher@tsl.texas.gov; 512-463-4855
Interlibrary Loan through OCLC Navigator

https://www.tsl.texas.gov/landing/ill.html
Competitive Grant Program

https://www.tsl.texas.gov/landing/libfunds.html
E-Rate

Federal Communication Commission discount program
Covers Internet, broadband costs
Assistance with application process available

E-rate Discount for Public Libraries

https://www.tsl.texas.gov/ld/tech/erate
TexShare Databases
Imagine a Library as Big As Texas!

TexShare Card Program

https://www tsl texas gov texshare card
Other Funding Opportunities

https://www.tsl.texas.gov/ldn/familyplace

Library Technology Academy

Technology Consultant
Cindy Fisher

https://www.tsl.texas.gov/ldn/librarytechacademy
Thank you!

Valicia Greenwood
Library Statistics Specialist/State Data Coordinator
Library Development and Networking Division
Texas State Library and Archives Commission
vgreenwood@tsl.texas.gov
800-252-9386 (toll free in Texas)
512-463-5466 (Austin direct)