



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



ACCREDITATION IN STATE LIBRARY SYSTEM APPLICATION Local Fiscal Year 2019

Must be submitted by April 30, 2020!

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.

Resources

| | | | |
|--|--|--------------------------------------|------------------------------------|
| Archives & Reference | Services for Libraries | Talking Book Program | Records Management |
|--|--|--------------------------------------|------------------------------------|

[Home](#) >

Public Library Accreditation and Statistics

| | | | |
|-------------------------------|-------------------------------|---|---------------------------------------|
| Annual Report | Accreditation | Public Library Statistics | Statistical Resources |
|-------------------------------|-------------------------------|---|---------------------------------------|

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 §1.85. That

<https://www.tsl.texas.gov/ldn/annualreport>

Forms are available in PDF format. PDF requires a free [Adobe Acrobat Reader](#).

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](#)

Contact Information

[Current Library Directory](#)

Statistics & Accreditation

accreditation@tsl.texas.gov;
800-252-9386
(Toll-free in Texas)

Valicia Greenwood
Library Statistics Specialist

Erica McCormick
Program Coordinator

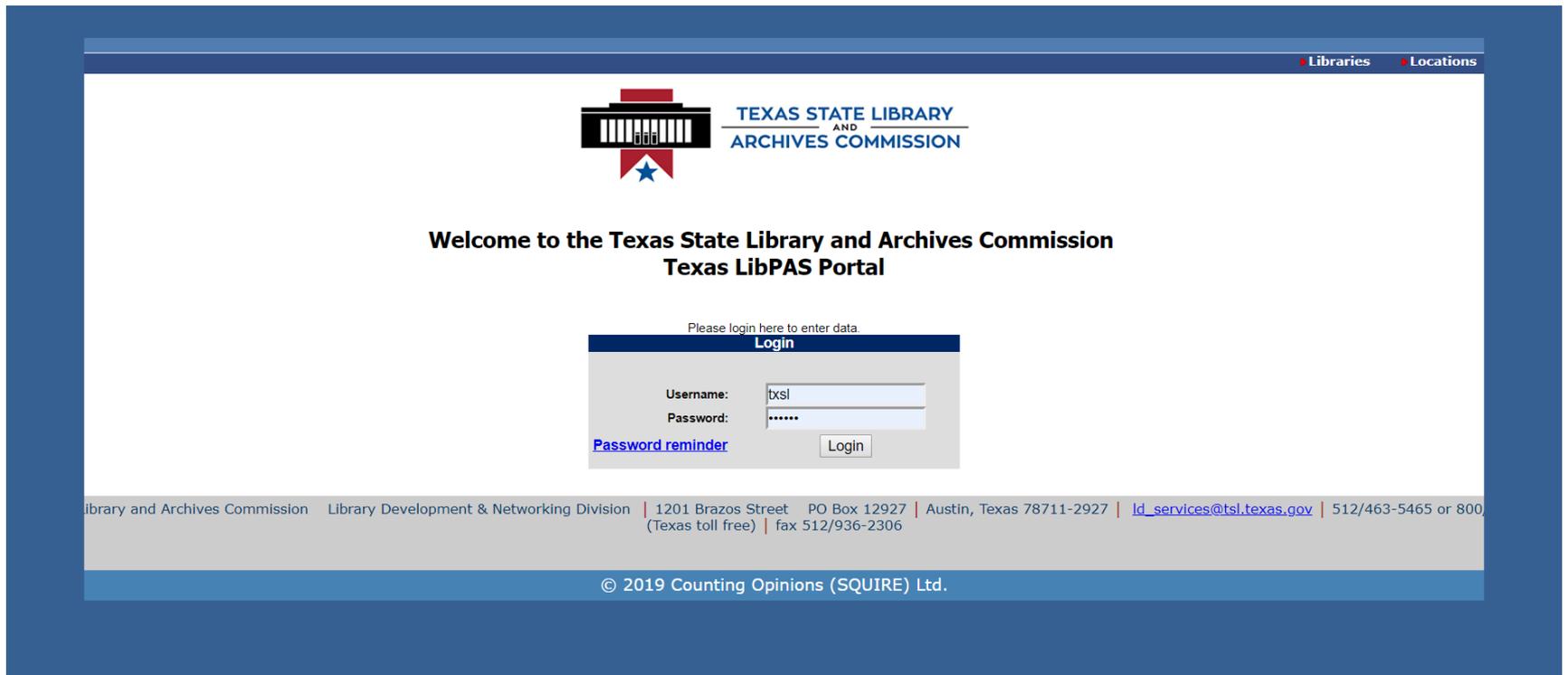
Jennifer Peters
Director, Library Development and
Networking Division

Tips and Tools

[Annual Report \(AR\)FAQ](#) (PDF)

Where to Start

Texas LibPAS <https://tx.countingopinions.com/>



The screenshot shows the Texas LibPAS Portal login page. At the top right, there are links for "Libraries" and "Locations". The main header features the Texas State Library and Archives Commission logo and name. Below the header, the text reads "Welcome to the Texas State Library and Archives Commission Texas LibPAS Portal". A login form is centered on the page, with the text "Please login here to enter data." above it. The form has a "Login" title and contains fields for "Username:" (with "txsl" entered) and "Password:" (with "*****" entered). There is a "Login" button and a "Password reminder" link. At the bottom of the page, there is a footer with contact information: "Library and Archives Commission | Library Development & Networking Division | 1201 Brazos Street | PO Box 12927 | Austin, Texas 78711-2927 | ld_services@tsl.texas.gov | 512/463-5465 or 800 (Texas toll free) | fax 512/936-2306". The copyright notice at the bottom reads "© 2019 Counting Opinions (SQUIRE) Ltd."

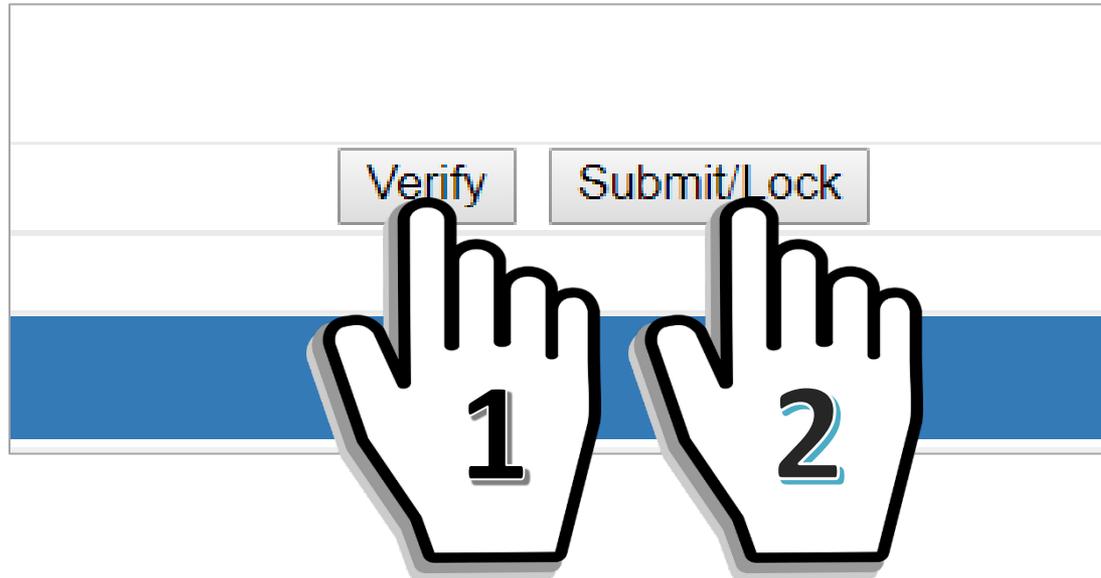
Where to Start



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



Analysis

Reports are analyzed through a computer program.

Perform 60 tests of the data.

Mathematical check of results.

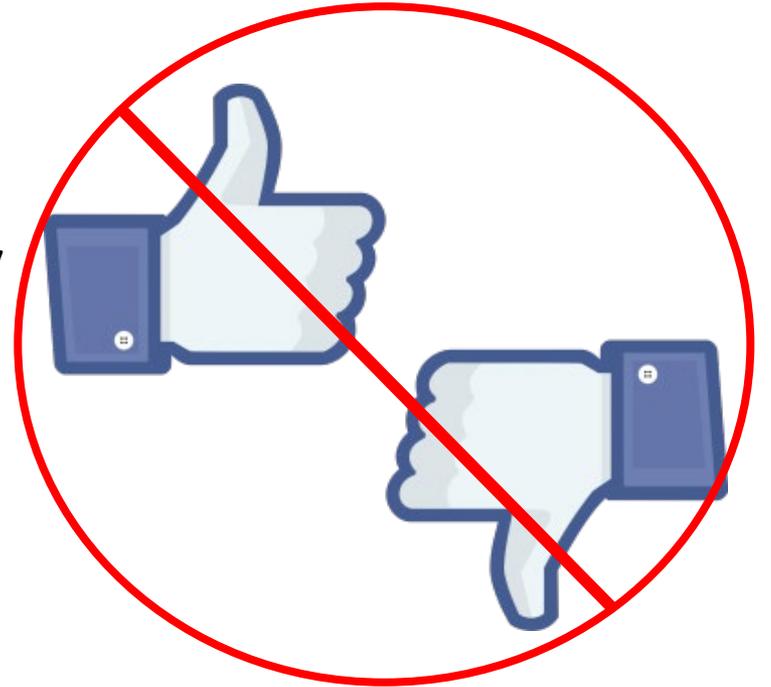
Runs a comparison to minimum accreditation criteria.

This analysis is NOT:

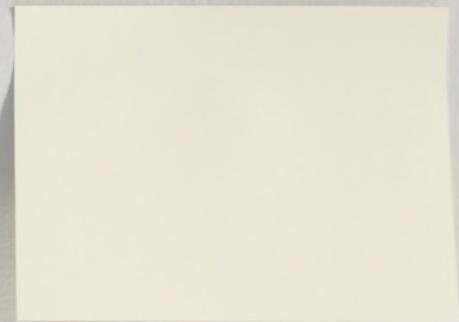
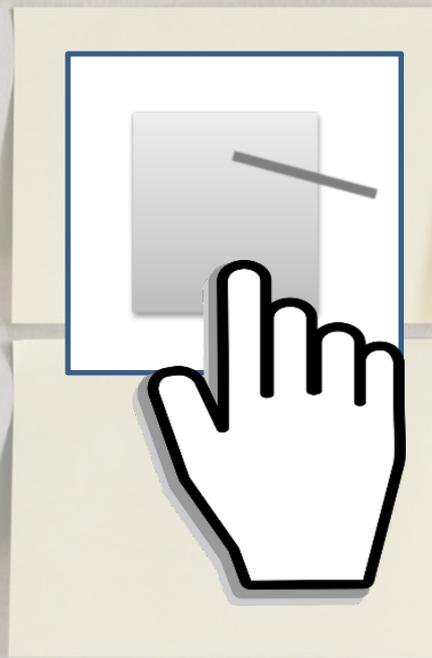
Personal (does not like or dislike)

An evaluation of the library

An evaluation of service provided in your community



Add Notes!



Edit Checks ✓

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

Edit Checks ✓

| | |
|-------------------------------|-----|
| <input type="text" value=""/> | \$0 |
| A value is required! | |

Data Input

| | | | | |
|--------------------------------------|-------|----------|------|---------------|
| Save | Reset | Previous | Next | Recalculate |
| Texas Public Libraries Annual Report | | | | Period 2019 ▼ |

Edit Checks

7.7 All Other Circulation (exclude Children's) - Digital format (Downloadable): 0 == 0 ? (32960 + 12002 + 2138) == 0 :1
ADULT AND YOUNG ADULT DIGITAL FORMAT CIRCULATION is zero and the sum of ELECTRONIC BOOKS and AUDIO DOWNLOADABLE UNITS
and VIDEO DOWNLOADABLE UNITS is greater than zero.

Add a note or review the amounts.

Edit Checks



3.11 Total Operating Expenditures ✓

\$1,990,552

EDIT CHECK

3.11 Total Operating Expenditures: (1990552 > 0 && 1744705 > 0) && (1744705/1990552 < 0.70 || 1744705/1990552 >= 3.57)
The ratio of TOTAL OPERATING EXPENDITURES to TOTAL STAFF EXPENDITURES is higher/lower than expected. Please check for possible errors or explain why the correct data are out of range.

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

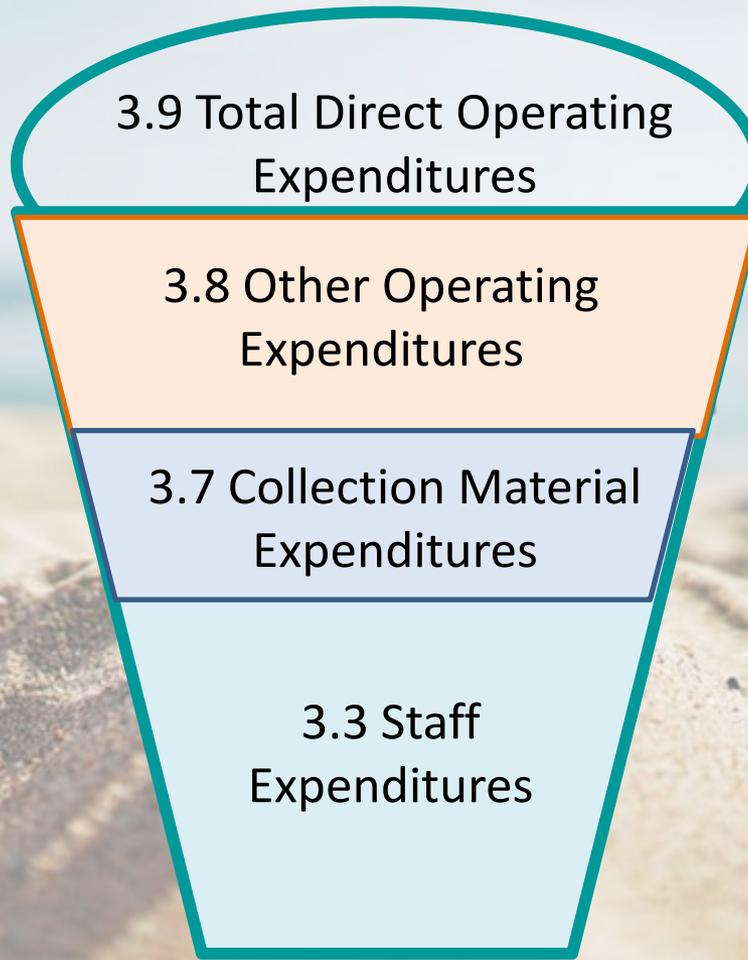
Capital Expenditures

Land Purchase
Building Purchase
Renovation Costs

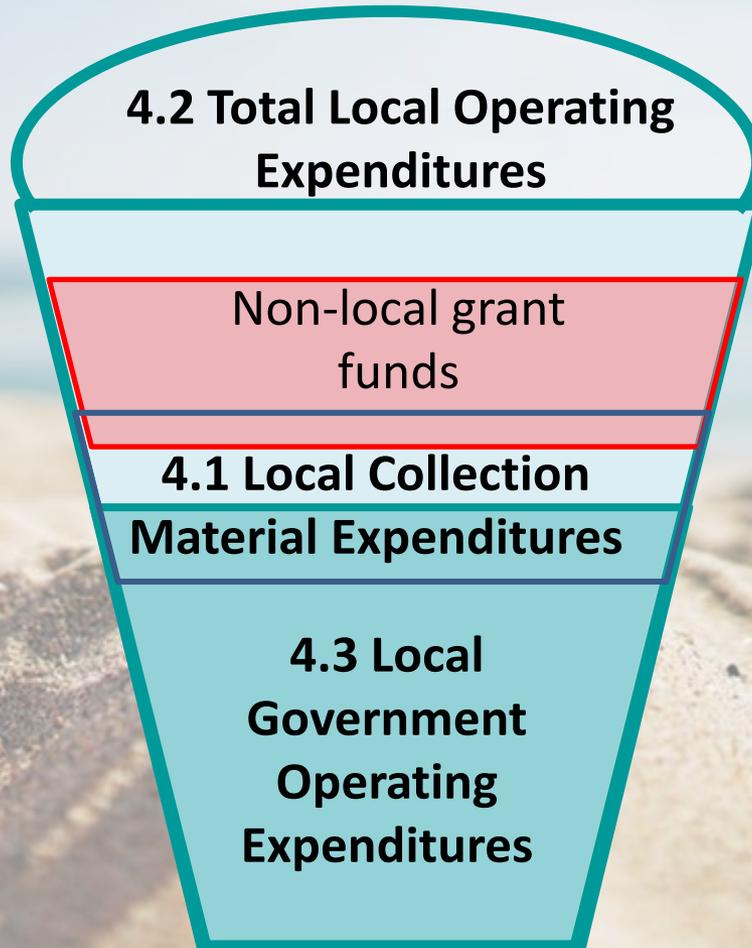
New Vehicles
Computer Servers
Library Automation
System
Opening Day Collection
One-Time Major Projects

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

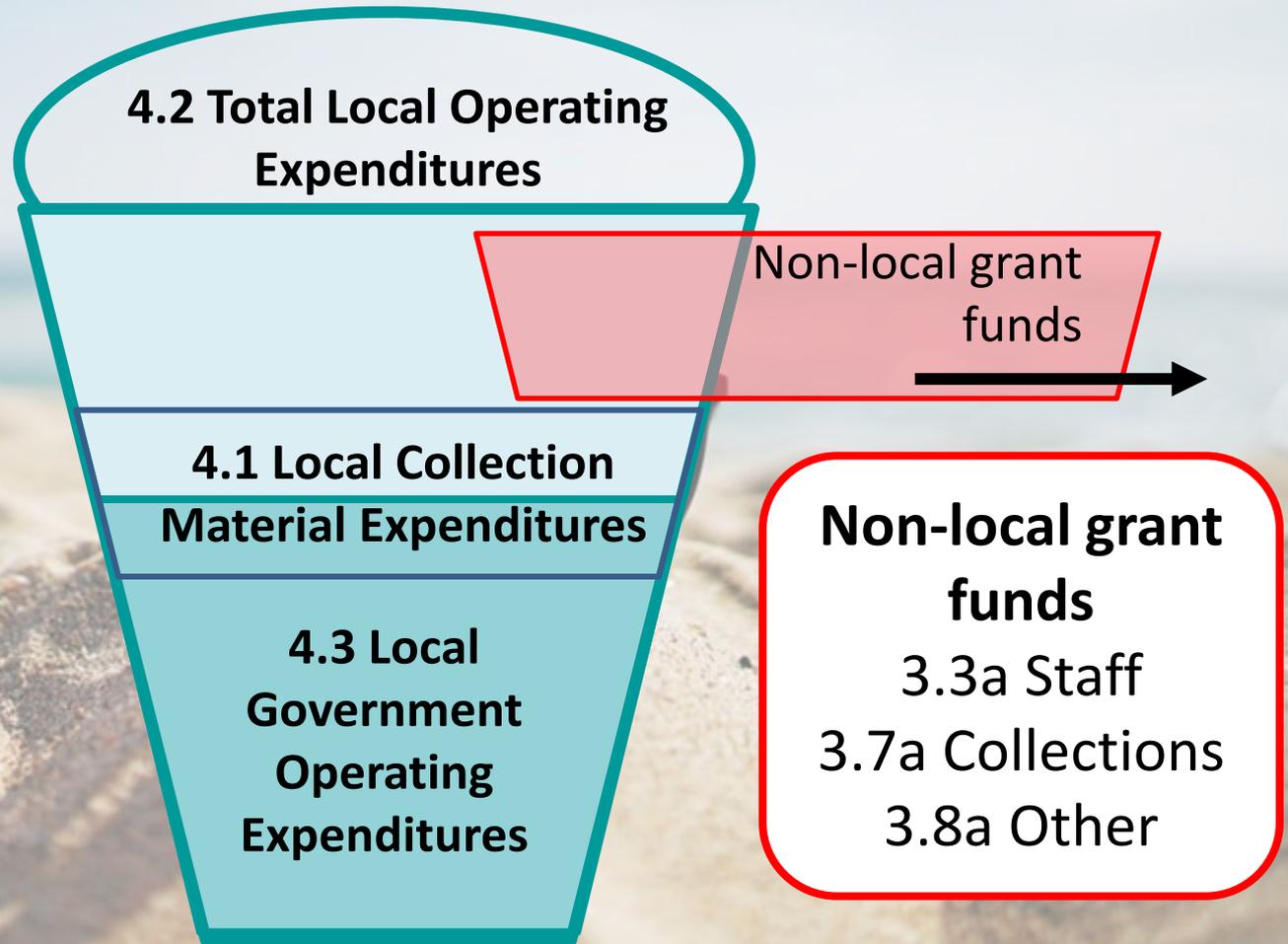
Library Operating Expenditures



Local Operating Expenditures



Local Operating Expenditures



Non-Local Grant Funds



Foundation or Corporate Funds



Ladd & Katherine Hancher
Library Foundation



Federal Funds

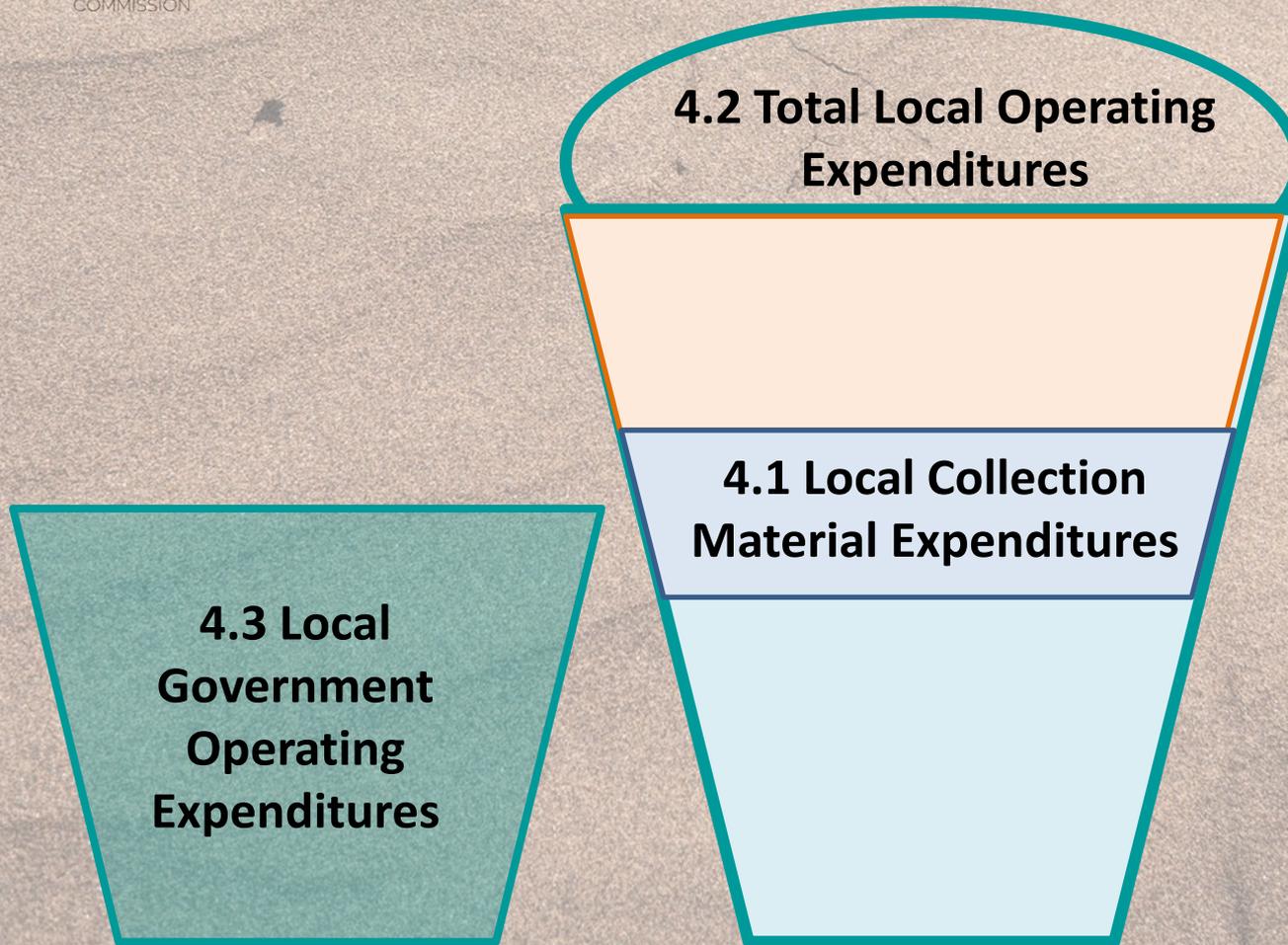


State Funds

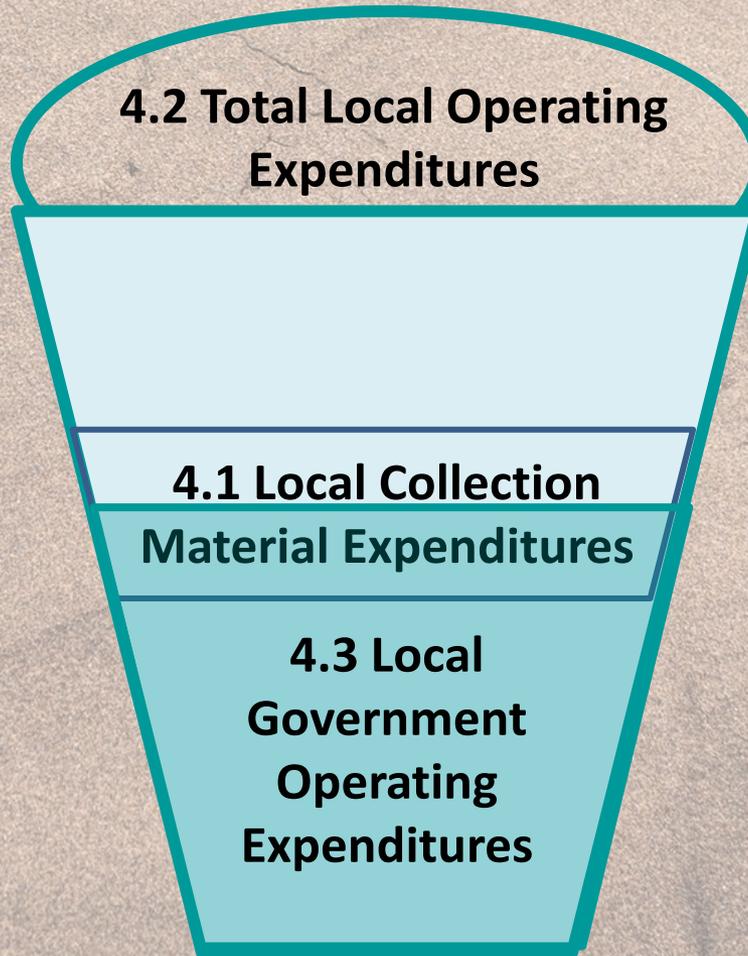


Texas
Commission
on the Arts
Investing in a Creative Texas

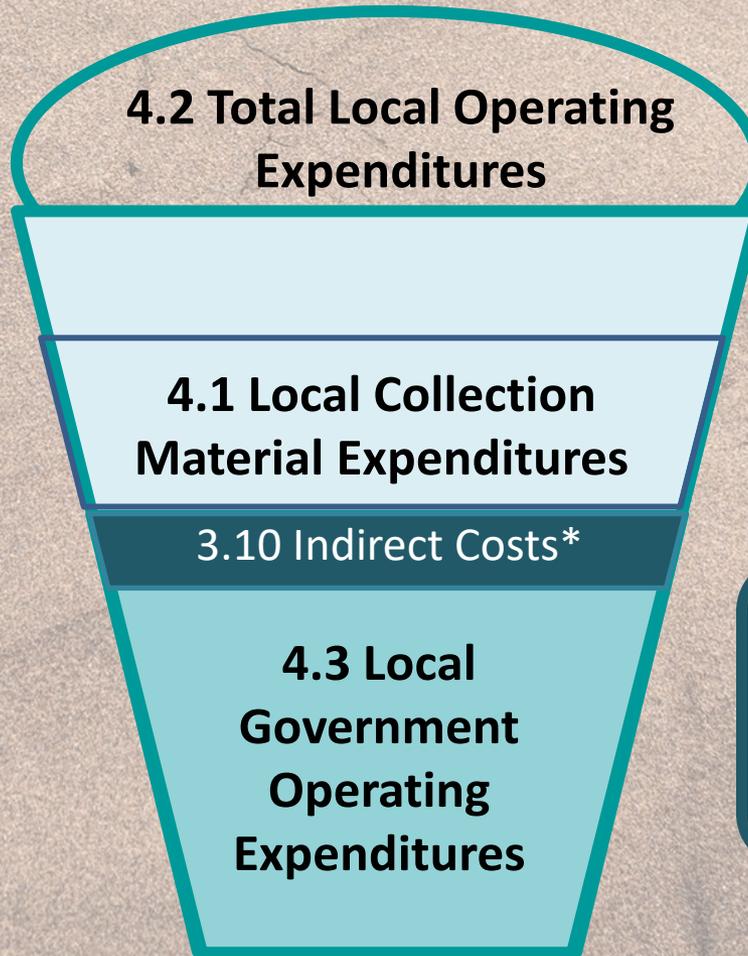
Local Operating Expenditures



Local Operating Expenditures



Including Indirect Costs*



*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:

2016 (4.2) \$17,059

2017 (4.2) \$17,734

2018 (4.2) \$18,564

Sum \$53,357

2016

2017

2018

MOE

Simple Average

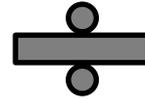
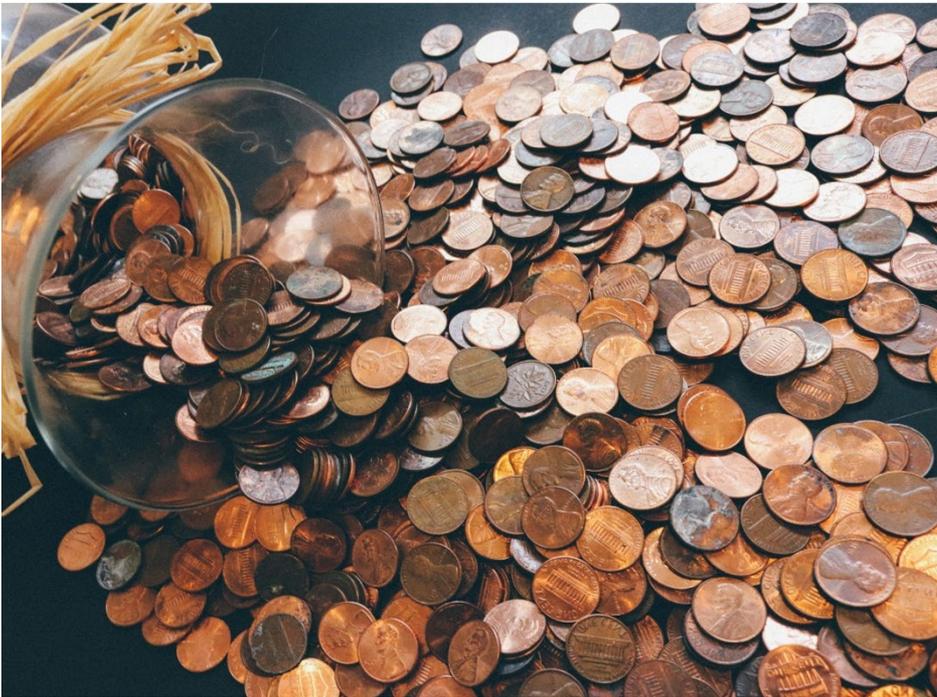
Add together and divide by 3.

$$\$53.357/3 =$$

MOE 2019 \$17,785.6667

Per Capita Operating Expenditures

Total Local Operating Expenditures (4.2)



Population Assignment



**Per Capita Local
Operating Expenditures**

MOE

Per Capita Average

Calculation:

| Year | 4.2 | Population |
|-------|----------|------------|
| 2016 | \$17,059 | 3,571 |
| 2017 | \$17,734 | 3,601 |
| 2018 | \$18,564 | 3,645 |
| Total | \$53,357 | 10,817 |



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**



3. Appeal

Present at
Library Systems
Act Advisory
Board meeting
in June.



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...

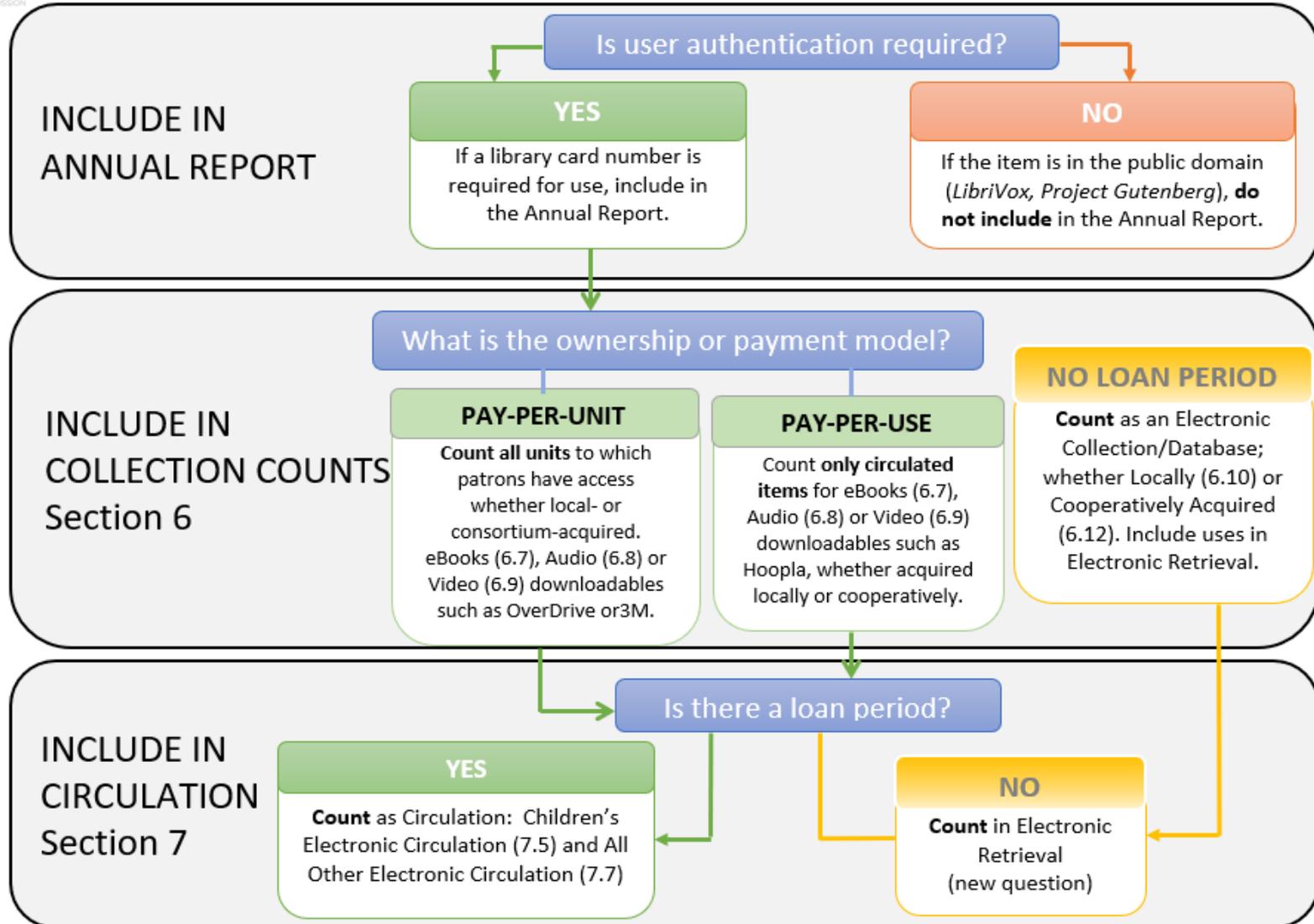
- One item per capita, 7,500 items, or 15% of budget on collections.
- Minimum per capita expenditures.
- Required number of professional librarians.
- Required number of hours director employed in library duties.
- Required number of hours open.



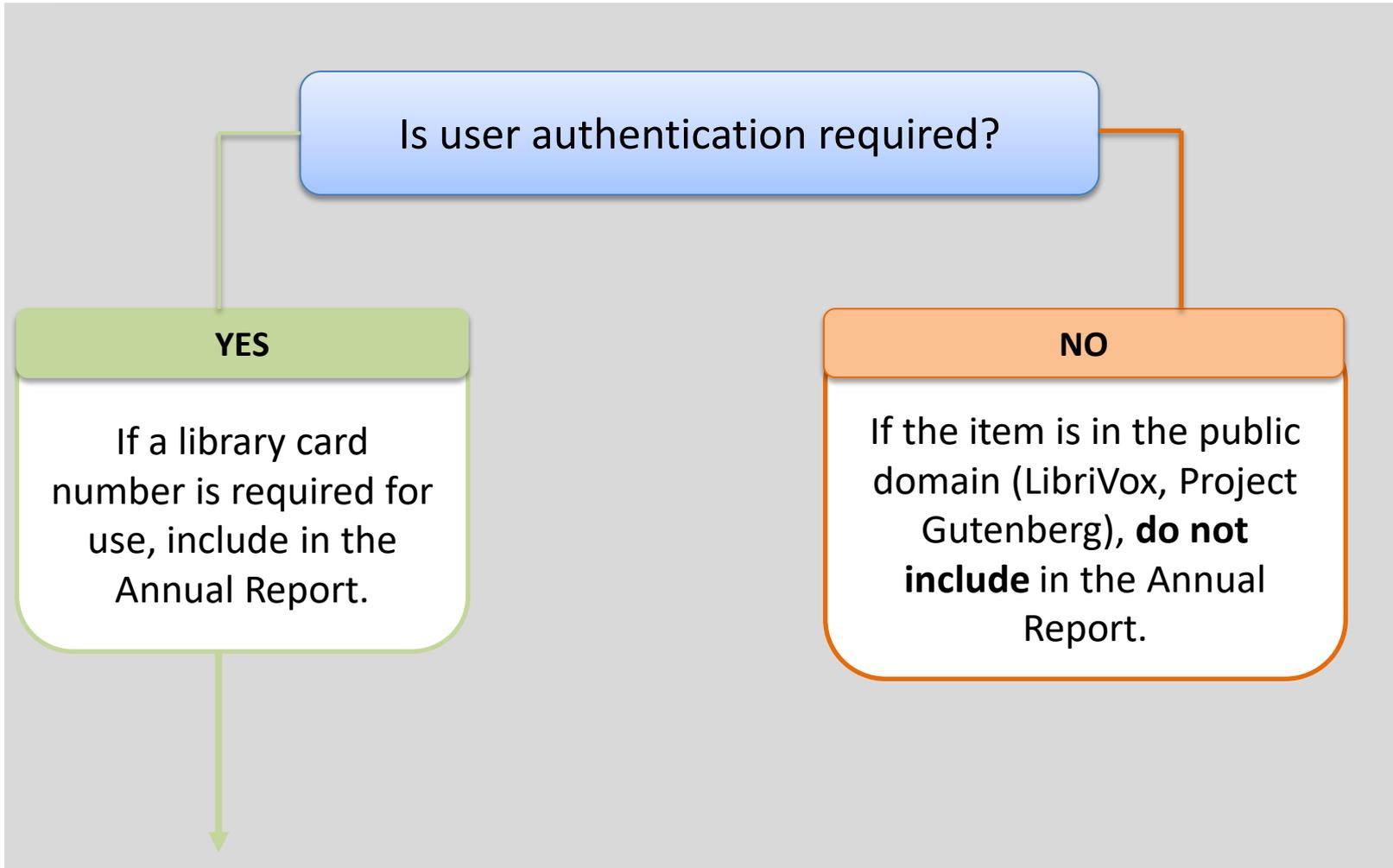
**...can be on probation for up to
three years.**



Reporting Electronic (Downloadable) Materials



INCLUDE IN ANNUAL REPORT?



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) downloadables such as OverDrive or 3M.

PAY-PER-USE

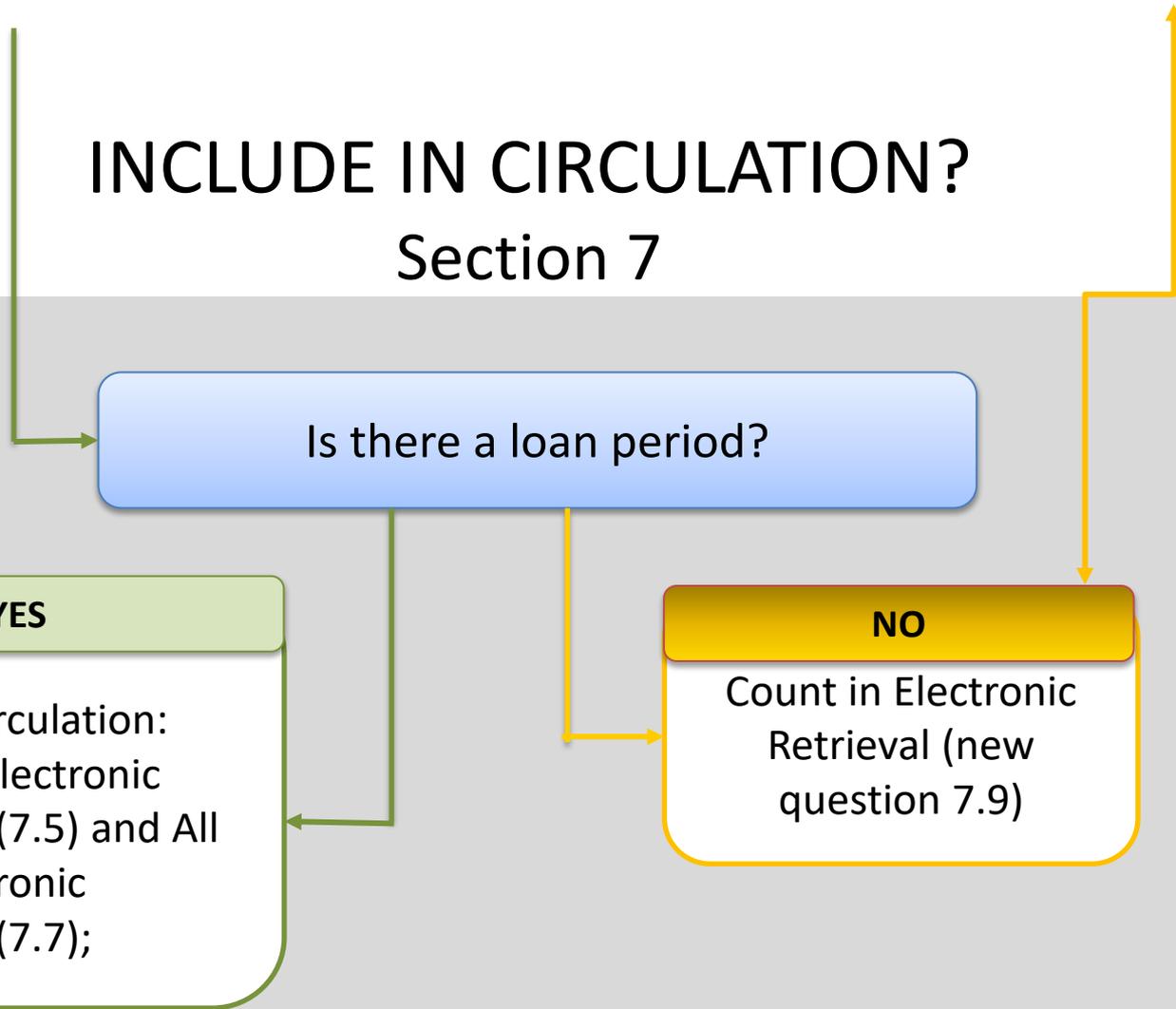
Count **only circulated items** for eBooks (6.7), Audio (6.8) or Video (6.9) downloadables such as Hoopla, whether acquired locally or cooperatively

NO LOAN PERIOD

Count as an Electronic Collection/Database; whether Locally (6.10) or Cooperatively Acquired (6.12). Include uses in Electronic Retrieval (7.9).

INCLUDE IN CIRCULATION?

Section 7



Programming/Attendance

Report number of events

Report all in attendance, regardless of age

Target age range

| | |
|-------------|--------------------------|
| Children | Age 11 years and younger |
| Young Adult | Age 12 through 18 years |
| Adults | Age 19 years and older |

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 Section 7

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

| FOR | COUNT AS |
|---|--|
| One-on-one training | Reference transaction (7.1) |
| Book delivery to facility or home-bound | Circulation of materials (7.4/7.6) |
| Local business meeting at library | Library visits (7.2) |
| Library as polling place (voters) | Library visits <i>only</i> if entering library space |
| Non-profit volunteers tutoring | Library visits – students and tutors |

INCLUDE IN ANNUAL REPORT?

YES

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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.

Website Visits



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

Use Google Analytics or similar software



Website Visits

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

Do not count any hour twice!

| Weekly Total Hours Calculator - COMPOSITE NUMBER OF HOURS | | | | | | | | | |
|---|-------------|-------------|--------------|-------------|--------------|-------------|-------------|--------------|---------------------------|
| TIME | SUN | MON | TUES | WED | THUR | FRI | SAT | SUN | TOTAL |
| 7:00 - 8:00 a.m. | | | | | | | | | |
| 8:00 - 9:00 a.m. | | | | | | | | | |
| 9:00 - 10:00 a.m. | | 0.50 | 1.00 | 0.50 | 1.00 | 1.00 | | | |
| 10:00 - 11:00 a.m. | | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 0.50 | | |
| 11:00 - 12:00 p.m. | | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | | |
| 12:00 - 1:00 p.m. | | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | | |
| 1:00 - 2:00 p.m. | | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | | |
| 2:00 - 3:00 p.m. | | 1.00 | 1.00 | 1.00 | 1.00 | 0.50 | 1.00 | | |
| 3:00 - 4:00 p.m. | | 1.00 | 1.00 | 1.00 | 1.00 | | 1.00 | | |
| 4:00 - 5:00 p.m. | | 1.00 | 1.00 | 1.00 | 1.00 | | | | |
| 5:00 - 6:00 p.m. | | | 1.00 | | 1.00 | | | | |
| 6:00 - 7:00 p.m. | | | 1.00 | | 1.00 | | | | |
| 7:00 - 8:00 p.m. | | | 1.00 | | 1.00 | | | | |
| 8:00 - 9:00 p.m. | | | 1.00 | | 1.00 | | | | |
| 9:00 - 10:00 p.m. | | | | | | | | | |
| DAILY TOTALS | 0.00 | 7.50 | 12.00 | 7.50 | 12.00 | 5.50 | 5.50 | 50.00 | <= WEEKLY TOTAL |

Key:
 Only Main open
 Only branches open
 Both open

Section 12

Only for libraries with branches

Basic Contact Information

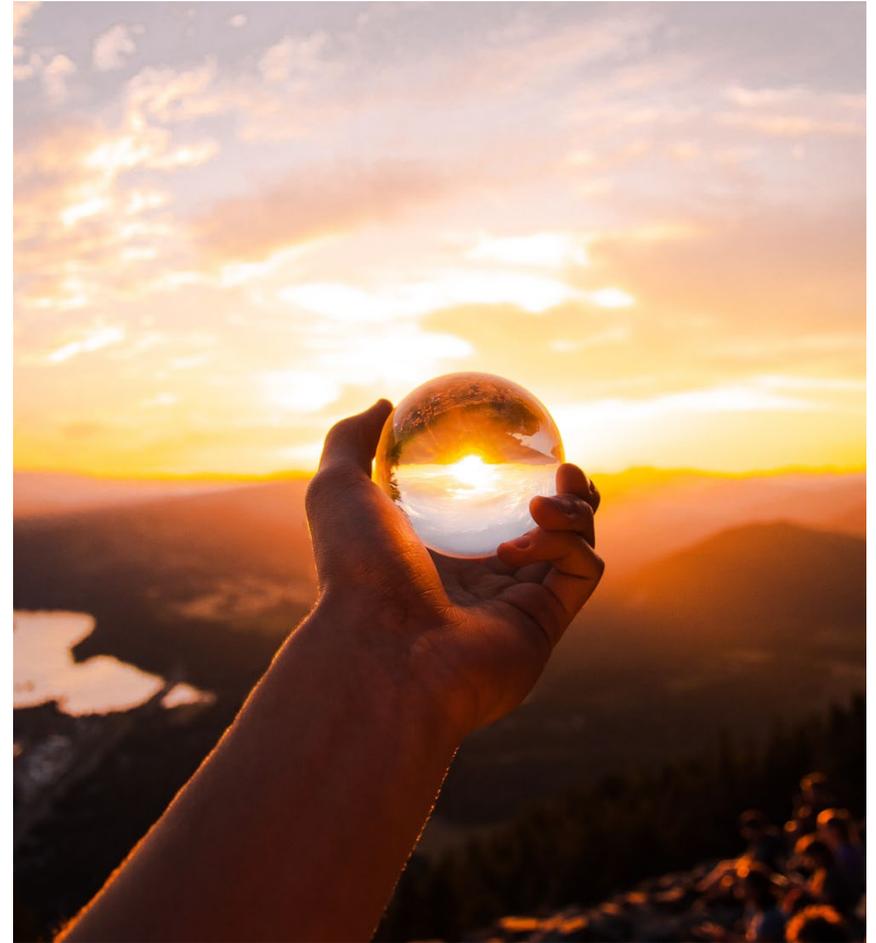
Service hours of each branch

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.

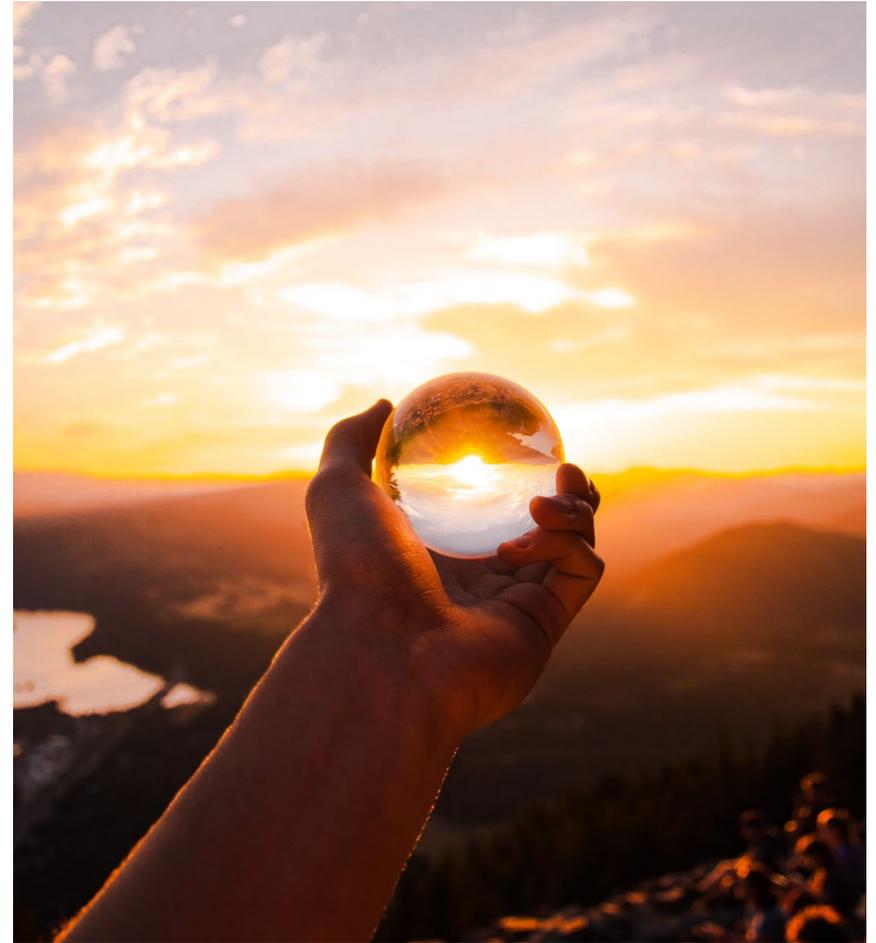


Next Year?

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!



collaborative

summer library program™

Any Library Completing the Texas Public Libraries Annual Report

Imagine
Your
Story



© CSLP 2020



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

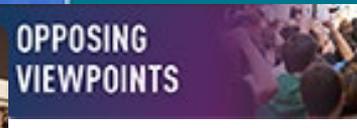
Covers Internet, broadband
costs

Assistance with application
process available



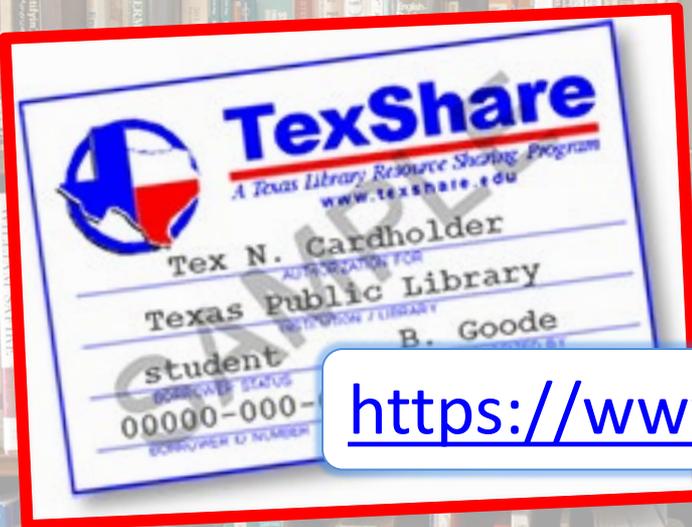
**E-rate Discount
for Public Libraries**

<https://www.tsl.texas.gov/ld/tech/erate>



TexShare Databases

Imagine a Library as Big As Texas!



<https://www.tsl.texas.gov/texshare/card>

TexShare Card Program

Other Funding Opportunities



Technology Consultant
Cindy Fisher

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

<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)