

Instructions

GENERAL

This report is intended to provide a general description of your library and the services it provides to library users for calendar 2008. The information collected will be published online in the 2008 *Wisconsin Public Library Service Data* and the 2009 *Wisconsin Public Library Directory*. It will also be made available for download on the Department of Public Instruction's web site. Selected data elements will be transmitted to the Institute for Library and Museum Services for creation of a national database of public library information.

When completing the annual report, please do not leave any questions blank unless that is allowed in the instructions. (Unused lines for board members and staff, for example, should be left blank.) For those items requiring a numeric response, use "0" to indicate "zero" or "none" and "-1" to indicate "not available" or "not applicable." **Numbers must be entered without commas or dollar signs** (i.e., 34567 instead of \$34,567). Library board or staff positions that are vacant should be indicated with the word, "Vacant."

Some of your library information has been provided on the electronic form. Please review this information carefully and change only those items that are not correct.

If, while completing this form, you wish to add an explanation or comment concerning an entry, each section of the electronic form ends with a screen for comments. If clarification or other assistance is needed in completing this form, please contact your system headquarters or the Division for Libraries, Technology, and Community Learning.

I. LIBRARY IDENTIFICATION AND GENERAL INFORMATION

This section requests basic information on the library's public service outlets. Some entries are pre-populated with information. Please update and enter corrections only as necessary.

1. Enter the complete **legal name** of the public library.
2. Enter the name of your **public library system**.
3. Enter the **first name** of the **head librarian / director** as of the date of this report.
- 3a. Enter the **last name** of the **head librarian / director**.
4. Indicate the **certification grade** (1, 2 or 3) of the head librarian/director.
- 4a. Select the **certification grade type** (provisional, temporary, regular or permanent) of the head librarian/director.
5. Enter the **date the certification of the head librarian/director will expire**. All certifications expire on the last day the month. For example, certification through May 2009 would expire May 31, 2009. Leave blank only for the classification "permanent."
6. Enter the complete **street address** of the main library. This should be the location where the principal collections are kept.
- 6a. Enter the **mailing address** (e.g., PO Box number) if different from the street address. Otherwise leave blank.
7. Enter the name of the **municipality** in which the library is located.
8. Provide the name of the **county** in which the library is located. If the library's municipality is located in two or more counties, provide the name of the county used for system membership purposes.
9. Enter the library's **five digit postal zip code** plus the 4-digit zip code extension.

10. Provide the **telephone number** (including area code) of the library.
11. Provide the **fax number** for the library. If there is no library fax number, leave blank.
12. Provide the **director's email address**. If the director does not have an individual email address, supply the email address for the library.
13. If applicable, provide the **library's web address**. Otherwise leave blank.
14. A **branch library** is a library auxiliary unit of the main library which has at least all of the following: (1) separate quarters, (2) an organized collection of library materials, (3) paid staff, and (4) regular scheduled hours for being open to the public. Branches are, however, administered from the central library. If the library has no branches, enter 0. If your library has branches, enter the number of branches in the space provided and attach to your print copy a list of all branches. Include branch name, full address including ZIP code plus 4, telephone number, hours open, person in charge and square footage as defined below in 21.
15. 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. Count the number of vehicles in use. Enter the total number of bookmobiles in the space provided.
16. **Other public service outlets** are locations to which library materials are distributed for lending but at which there is no permanent collection or library staff. Do not report bookmobile stops. Include collections in nursing homes, jails, etc. Enter the total number of other public service outlets in the space provided.
17. Indicate whether or not your library operates a **books-by-mail** program.
18. A public library may be legally organized as a **joint public library**. This means the library was created by two or more municipalities or by a county and one or more municipalities in whole or in part in the county. *Answer "yes" only if your library is a joint library established under Wis. Statute 43.53.*
19. **Hours open** per week are the public access hours for the main library for winter and summer. Report the number of weeks during the year to which winter and summer hours apply.
20. The **annual service hours** are the sum of annual public service hours for the main library, bookmobiles, and all branches **for the year just ended**. Public open hours of all facilities are totaled regardless of whether or not they were open at the same time. For each bookmobile, count the hours the bookmobile is open to the public, but do not include travel time between stops. Minor variations in scheduled public service hours need not be included; however, extensive hours closed to the public due to natural disasters or other events should be excluded even if staff is scheduled to work. Do not include hours for deposit collections or other similar service outlets. Report the annual hours open.
 Example: If a library with no branches is open 40 hours per week all year, it would report 2,080 hours (40 x 52). If this library had three branches open the same number of hours as the main library, the total service hours per week would be 160 (40 hours per week for the main library plus 3 x 40 = 120 hours per week for branches). The reported total annual hours would be 8,320 (160 x 52).
21. Report the **square footage** of the main public library. Provide the area, in square feet, of the main public library building. Libraries with branches report the square footage of branches in the branch attachment requested in 14 above. Report the total area in square feet for each outlet separately. The square footage is the area on all floors enclosed by the outer walls of the library or branch. Include all area occupied by the library, including those areas off-limits to the public. Include any area shared with another agency or agencies if the library or branch has use of that area.
22. Indicate whether or not the library, or one of its branches, **moved to a new facility or completed an expansion** of an existing facility in the previous year.

II. LIBRARY COLLECTION

This section of the report collects data on selected types of materials. It does not cover all materials. Libraries may report other materials owned under item 7 of this section. Under this category report only items the library has acquired as part of the collection and catalogued, whether purchased, leased, licensed, or donated as gifts.

Physical units are volumes, items or pieces. Items that are packaged together as a unit, e.g., two compact discs, several audiocassettes for one recorded book, or two videocassettes, and are generally checked out as a unit, should be reported as **one** physical unit.

1. Report a single figure that is the sum of the number of **books in print** and **serial back files in print** held at the end of the year. Report the **number added** during the year.
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.
Serials are publications issued in successive parts, usually at regular intervals, and, as a rule, intended to be continued indefinitely. Serials include periodicals (magazines), newspapers, annuals, journals, memoirs, proceedings, and transactions of societies; and numbered monographic series. Government documents and reference tools are often issued as serials. Except for the current volume, count unbound serials as volumes when the library has at least half of the issues in a publisher's volume. Report the number of physical units, including duplicates. Serials packaged together as a unit (e.g., a 2-volume serial monograph) checked out as a unit are counted as one physical unit.
2. **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). Include non-serial government documents. E-books are loaned to users on portable devices (e-book readers) 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 physical or electronic units, including duplicates, for all outlets. E-books packaged together as a unit (e.g., multiple titles on a single e-book reader) and checked out as a unit are counted as one unit.
Note: Under this category report only items the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC). This includes NetLibrary titles.
3. Report the number of physical units, including duplicates, of **audio materials** held at the end of the year. 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-CD-ROMs), Playaway digital audiobooks, talking books, and other sound recordings. Report the number added during the year.
4. Report the number of **electronic audio units or downloadables** that the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC). An electronic unit or downloadable is a title, either leased or owned, that is accessible through the library's catalog. Include sound recordings such as web-based or downloadable audio books and MP3 files. This would include OverDrive titles made available by your system.
5. A **database** is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts) with a common user interface and software for the retrieval and manipulation of the data. Report the number of licensed databases, including locally mounted or remote, full-text or not, for which temporary or permanent access rights have been acquired by your library, but do not include databases provided or licensed by the public library system for all member libraries, or through BadgerLink. (The number of databases provided or licensed by your system and

through BadgerLink will be added to the database count reported here to provide the number of databases available at the library.)

Note: The data or records are usually collected with a particular intent and relate to a defined topic. A database may be issued on CD-ROM, diskette, or other direct access method, or as a computer file accessed via dial-up methods or via the Internet. Subscriptions to individual electronic serial titles are reported under Current Electronic Serial Subscriptions. Each licensed database product is counted individually even if access to several licensed database products is supported through the same vendor interface.

6. Enter the number of physical units, including duplicates, of **video materials** held at the end of the year. 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, CD-ROM, etc. Also report the **number added** during the year.
7. Report the number of **electronic video units or downloadables** that the library has selected as part of the collection and made accessible through the library's Online Public Access Catalog (OPAC). Electronic unit formats may include web-based or downloadable files, etc. This is a title, either leased or owned, that is accessible through a library's catalog. This includes Overdrive videos made available through your system.
8. 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 already reported that the library would like to report. A response is not required. This might include toys, kits, etc.
9. Report the total number of **current print serial subscriptions**, including duplicates. 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. Count both subscriptions purchased from the library's budget and those subscriptions donated to the library as gifts. Do not report the number of individual issues. *Example: Three current subscriptions to Time and 4 subscriptions to Newsweek would be reported as 7 for the number of subscriptions.*
10. **Current electronic serial subscriptions** are arrangements by which, in return for a sum paid in advance, electronic serials are provided for a specified number of issues. Report the number of current electronic and digital serial subscriptions (e-serials, e-journals), including duplicates, for all outlets. Examples include periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series distributed in the following ways: a) via the Internet (e.g., HTML, PDF, JPEG, or compressed file formats such as zipped files), b) on CD-ROM or other portable digital carrier, c) on databases (including locally mounted databases), and d) on diskettes or magnetic tapes. Electronic serial subscriptions include serials held locally or remote resources that the library has authorization to access, including those available through statewide or consortia agreements. Do not include subscriptions to indexing and abstracting databases that include full-text serial content (e.g., EBSCO Host, ProQuest, OCLC FirstSearch).

III. LIBRARY SERVICES

1. Provide **total annual circulation** for the past year by age classification. Report the total annual circulation of all library materials of all types, including renewals. **Circulation of children's material** is the annual circulation, including renewals, of all children's material in all formats to all users.
A **circulation transaction** is the act of loaning materials in all formats for use outside the library. This activity includes checking out materials to users, either manually or electronically, and also renewing, 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. Interlibrary loan items provided to the library and checked out by the library should be reported here as a circulation. *Do not include interlibrary loan items sent, or checked out to, another library.*

2. **Interlibrary loans** are library materials, or copies of the materials, provided by one autonomous library to another upon request. The libraries involved in interlibrary loan are not under the same administration. Report the annual total.
 - 2a. Report the annual total loans of materials, or copies of materials, **provided to other libraries** upon request. (These are not included in the circulation count.)
 - 2b. Report the annual total loans of materials, or copies of materials, **received from other libraries** upon request. (These are included in circulation if they are checked out to users.)
3. A **registered borrower** 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. 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, enter “-1.”
 - 3a. **Residents** are persons living in the library’s municipality. Enter the number of **registered residents**.
 - 3b. **Nonresidents** are persons served by the library but who live outside of the library’s municipality. Enter the number of **registered nonresidents**.
 - 3c. Report the **total number of registered borrowers**.

If an annual count of reference transactions or visits is unavailable, a typical week sample survey or other reliable estimate may be used to determine the annual number. You may determine an annual estimate by counting reference transactions or visits during a typical week in October and multiplying the count by the number of weeks open during the year. A “typical week” is a time that is neither unusually busy nor unusually slow. Avoid holiday times and vacation periods for key staff, and 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. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open). A more rigorous sample survey than a typical week may be desirable and should be used if available.

4. Enter the total annual count of **reference transactions**. A reference transaction is an information contact which involves the knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The term includes information and referral service. Information sources include printed and non-print materials, machine-readable databases, catalogs and other holdings records, and, through communication or referral, other libraries and institutions and persons both inside and outside the library. The request may come in person, by phone, by fax, by mail, or by electronic mail or networked electronic reference service from an adult, a young adult, or a child.

Note: Do not count directional transactions or questions of rules or policies in the report of reference transactions. Examples of directional are “Where are the children’s books?” and “I’m looking for a book with the call number 811.2G.” An example of a question of rules or policies is “Are you open until 9:00 tonight?”
5. Report total annual count of **library visits**. This is the total number of persons entering the library for whatever purpose during the year.
6. Report the annual **number of users of public Internet computers in the library**. Report the total number of individuals that have used 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 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 users.

Note: The number of users may be counted manually using registration logs. Count each user that uses electronic resources, regardless of the time spent on the computer. A user who uses the library's public Internet computer(s) three times a week would count as three customers. Software such as "Historian" can also be used to track the number of users at each Internet computer. If the data element is collected as a weekly figure, that figure should be multiplied by the number of weeks the library is open during the year to annualize it.

7. Report the number of **database sessions for locally licensed databases**. *Libraries should report only for those databases that are contracted for service directly by the library. Public libraries without licenses separate from their public library system or the state's licensed databases (BadgerLink) should enter zero.* A session is defined as a successful request of a commercial service (e.g., online database). It is one cycle of user activities that typically starts when a user connects to a database and ends by terminating activity in the database that is either explicit (by leaving the database through log-out or exit) or implicit (timeout due to user inactivity or session length)
8. Report total annual count for **adult and children's programs and program attendance**. A program is any 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. Programs may cover use of the library, library services, or library tours. Programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of programs include film showings; lectures; story hours; literacy, English as a second language, and citizenship classes; and book discussions. Count all programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Exclude programs sponsored by other groups that use library facilities. If programs are offered as a series, count each program in the series. For example, a film series offered once a week for eight weeks should be counted as eight programs. Total **attendance at library adult programs** is a total count of the audience at all these library programs during the reporting period.

A **children's program** is any planned event for which the primary audience is children and which introduces the group of children attending to any of the broad range of library services or activities for children or which directly provides information to participants. Children's programs may cover use of the library, library services, or library tours. Children's programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. Examples of these types of programs include story hours and summer reading events. Count all children's programs, whether held on- or off-site, that are sponsored or co-sponsored by the library. Do not include children's programs sponsored by other groups that use library facilities. If children's programs are offered as a series, count each program in the series. For example, a story hour offered once a week, 48 weeks a year, should be counted as 48 programs. (Note: *Output Measures for Public Library Service to Children: A Manual of Standardized Procedures* (ALA, 1992) defines children as persons age 14 and under.)

Children's program attendance is the count of the audience at all programs for which the primary audience is children 14 years and under. Include adults who attend programs intended primarily for children.

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.

9. Report the **number of library's computers** [personal computers (PCs) and laptops], whether purchased, leased, or donated, **used by the general public** in the library. Of this total, report the **number that are Internet computers**. Do not report laptops brought in by the public for personal use or to use the library's wireless Internet.

IV. LIBRARY GOVERNANCE

1. Provide a complete list of all board members and officers *as of the date of this report*. Enter “Vacancy” if any positions are unfilled at the time of this report
2. Provide the number of library board members. Include vacancies authorized but not filled.

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 for capital expenditures, or income passed through to another agency (e.g., fines). (See the definition of library capital funds in Section VII below.)* 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(s) 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 expended by the local government directly 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.*

1. Report **appropriations from the library’s local municipality(ies)** as applicable. Do not include county appropriations, contract income or donations here.
Check the appropriate box and enter the name of the city. Report **appropriations received from the city** that established the library.
Check the appropriate box and enter the name(s) of the village(s). Report individual **appropriations received from the village(s)** that established the library.
Check the appropriate box and enter the name(s) of the town(s). Report individual **appropriations received from the town(s)** that established the library.
Check the appropriate box and enter the name of the Tribe. Report **appropriations received from the tribe** that established the library.
- 2a. Report the **home county appropriation** received by the library here. This will include home county funds transferred to the library through the system or a county service. Provide the name of the county. If the library’s municipality is located in two or more counties, provide the name of the county used for system membership purposes. Only one county can be a home county.
- 2b. Report **payments from other counties for library services** here. This will include other county funds transferred to the library through the system. Provide the name of the county. These are county payments other than the home county appropriation report in 2a.
3. **State funds** received from your public library systems, or from another state program, and system state funds carried forward from the previous year should be reported here. Your system can verify the amount of state aid to public library systems funds paid to your library. Attach a list of state-funded projects if necessary. 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, they should be reported under Section VII, LIBRARY CAPITAL INCOME, EXPENDITURES, DEBT RETIREMENT, AND RENT.

4. **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 and the amount received. Report Library Services and Technology Act (LSTA) grant awards to your library here and enter the grant number(s). *LSTA grant awards to systems that are used to reimburse your library for expenses, or otherwise passed through to your library, should also be reported here.* If these funds were expended or budgeted for capital outlays, such as major equipment purchases, they should be reported under Section VII, LIBRARY CAPITAL INCOME, EXPENDITURES, DEBT RETIREMENT, AND RENT.
5. **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. If the contract funds are not paid directly to the library board, but are instead paid to the library's municipality, report the income in Section VIII, MUNICIPAL INCOME FOR LIBRARY SERVICES. Do not report federal Library Service and Technology Act 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 from 2007** include all funds carried forward from the previous year and available for library operating expenditures, except for state aid funds reported in 3b above.
7. **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 X,) OTHER FUNDS HELD BY THE LIBRARY BOARD AND TRUST FUND REPORT).
8. Enter the **sum** of lines 1 through 7.
9. Enter the **2009 appropriation** provided by your governing body for public library service. This is the amount you anticipate reporting next year on line 1 above if yours is a municipal library, or on line 2 if yours is a county library. Joint libraries should attach to the printed report a listing of appropriations from each participating municipality. Libraries filing electronically may use the Comments field at the end of this section to list appropriations from each participating municipality.
10. Indicate whether your library's municipality was exempt from the county library tax under Wisconsin Statutes 43.64(2) in 2008.

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 the value of any contributed or in-kind services or the value of any non-monetary gifts and donation, or rent paid by the library to library's municipality for public library space.* Do not include capital expenditures under this category (see instructions for the immediately following section).

1. 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. 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, workman's compensation, tuition, and housing benefits.

3. 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 in the following categories:
 - 3a. **Print material** is material consisting primarily of words and 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 binding and rebinding. Report all operating expenditures for print materials
 - 3b. **Electronic (digital) materials** include e-books, e-serials (including journals), 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 on magnetic tape, diskettes, computer software, CD-ROM, or other portable digital carrier, and can be accessed via a 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.

Note: 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** are library materials that are displayed by visual projection or magnification or through 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.
- 3d. Report all operating expenditures for **other materials**.
3. **Subtotal.** Add 3a through 3d and enter the total expended on the library's collection.
4. Report here any expenditure for **contract** arrangements with other libraries, their municipalities, or public library systems. The funds reported here are the funds paid out by your library. *Indicate the organization(s) receiving the funds.*
5. Report all operating expenditures other than those reported 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. Report the **total library operating expenditures** for the year just ended. The amount reported must equal the sum of lines 1 through 5.
7. Of the amount reported on line 6, report **the amount expended from federal program sources**. This amount is needed to calculate the county reimbursement for nonresident access to the library.

VII. LIBRARY CAPITAL REVENUE, EXPENDITURES, DEBT RETIREMENT, AND RENT

1. 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 a) site acquisition; b) new buildings; c) additions to or renovation of library buildings; d) furnishings, equipment, and initial collection (print, non-print, and electronic) for new buildings, building additions, or building renovations; e) computer hardware and software used to support library operations; to link to networks, or to run information products; f) new vehicles; and g) and other one-time major projects. Exclude replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. Do not include as revenue funds unspent in the previous year.
2. Enter **debt retirement** payments, if any, paid by the library board.

3. 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.

VIII. MUNICIPAL INCOME FOR LIBRARY SERVICES

Report the funds received by your municipality, during the calendar year of this report, in payment for public library services if the funds were not provided to the library board but were paid directly to the municipality. List the sources of these funds individually.

IX. STAFF

Report as of the last day of the year just ended. Indicate all positions funded in the library's budget whether those positions were filled or not. Do not list volunteers or staff paid from funds not administered by the library. Libraries with 10 or fewer employees must include all employees under 1a and 1b. Libraries with more than 10 employees should list the head librarian / director, chief assistants, branch librarians, division heads and other supervisory personnel and see the instructions for 1b below. Libraries with more than 10 employees must complete question 2. Include maintenance, plant operation and security staff paid by the library.

1. **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.
 - 1a. Provide the requested information only for **library staff persons holding the title of Librarian**. If the individual holds a master's degree from a program of library and information studies accredited by the American Library Association, indicate in the column headed MLS(ALA). Enter the annual salary and hours worked in a typical week.
 - 1b. Libraries with 10 or fewer employees must complete this section. Libraries with more than 10 employees should provide 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 10 employees must also provide the full-time equivalent for **all** "Other paid staff" on line 2b below. Enter **other paid staff** information as requested. This includes all other employees paid from the library's budget, including plant operation, maintenance and security personnel. *Beginning with this 2008 annual report, this will include the total annual wages paid to all persons reported in each classification reported.*

For example, if a library had 3 pages who worked an average of 10 hours per week each and who were paid in total \$10,900 in 2008, the library would report as follows.

Position	Total Wages Paid	Hrs Worked / Week
Pages	\$10,900	30

If your library has 10 or fewer employees, you may leave the remainder of this section blank and go to the next section. The division will use the information provided above to complete question 2 following.

2. 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 has been set as the measure of full-time employment. For example, if a library has 15 employees working 37.5 hr/week each, then the FTE calculation is $[15 \times 37.5] / 40$ or 14.06 FTEs. Round to two decimal places.
 - 2a. Complete the following for **employees holding the title of Librarian** (see definition of librarian above). Do not include any employee in more than one category.

- 2a1. Divide the total hours worked per week by 40 for all employees with **Master's degrees from programs accredited by ALA**. Enter the result in the space provided on line 2a1.
- 2a2. Divide the total hours worked per week by 40 for all **other persons holding the title of librarian**. Enter the result in the space provided on line 2a2.
- 2a. **Subtotal**. To determine the **FTE for persons holding the title of librarian**, sum the calculations from 2a1 and 2a2 above and enter in the space provided on the subtotal line.
- 2b. Determine the total hours worked per week by all other staff paid from the library budget. Include plant operation, security, and maintenance staff. Divide this number by 40 and enter the **all other paid staff full time equivalent** in the space provided.
- 2c. Add the FTEs reported on 2a and 2b and enter the sum in the space provided. This is the **total library staff full time equivalent**.

X. OTHER FUNDS HELD BY THE LIBRARY BOARD AND TRUST FUND REPORT

All funds under the library board's control must be reported. Report here any funds held by the library board that has not been reported in a previous section. *Wisconsin Statutes s.43.58(6)(a)* reads as follows:

(6) (a) Within 60 days after the conclusion of the fiscal year of the municipality or county in which the public library is located, the library board shall make a report to the division and to its governing body. The report shall state the condition of the library board's trust and the various sums of money received for the use of the public library during the year, specifying separately the amounts received from appropriations, from the income of trust funds, from rentals and other revenues of the public library and from other sources. The report shall state the condition of all funds in the library board's control and shall state in detail the disbursements on account of the public library during that fiscal year.

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

Wisconsin Statutes 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).

Report the total amount of other funds and trust funds held at end of year in the space provided.

XI. PUBLIC LIBRARY LOANS OF MATERIAL TO NONRESIDENTS

Nonresidents are library users who live outside the library's legal service jurisdiction, that is, 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 which are members of the joint library. Circulation is defined above in Section III, LIBRARY SERVICES.

Provide the requested information for items 1 through 7. The information provided on line 2b, *Circulation to nonresidents living in your county – Those without a library*, will be needed to calculate the county reimbursement 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 on line 2b. Report other county nonresident use on line 3 or 4 and on line 9, as appropriate.* For more information, see *Guidelines for Collection of Public Library Nonresident Usage Statistics*. This publication is available from the

Division for Libraries, Technology, and Community Learning or may be found at <http://dpi.wi.gov/pld/costat.html>.

8. "Does your library deny access to residents of adjacent public library systems on the basis of *Wis. Statute 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.
9. Report the circulation to nonresidents from any adjacent counties who do not have a local public library and the name of the county. The information provided on lines 9a through 9h will be needed to calculate the adjacent county reimbursement for nonresident use of the library where applicable.

XII. TECHNOLOGY and YOUTH SERVICES

1. Indicate if your library has an **integrated (automated) system**. If yes, indicate if the system is part of a system shared with other libraries.
2. Indicate the **type of Internet connection** your library has.
3. Select the appropriate response for the **library workstation filtering** practices.
4. Indicate if you library has **wireless access** or plans to install wireless access in the next year.
5. Provide the total number of **children registered for or participating in any 2008 summer library programs**.
6. Provide the number of **children who participated in any 2008 summer library programs who were not yet in kindergarten**. (Please estimate if number is unavailable.)
7. **Provide the total attendance (children and adult) at children's programs** at the library the summer of 2008.
8. Provide the **email addresses of staff who serve as children, youth, or teen librarians**. If the director serves as this librarian, only that name is needed. Do not list volunteers. If it is necessary to list more than 6 staff members, please contact Barbara Huntington at barbara.huntington@dpi.state.wi.us or (608) 267-5077.

XIII. PUBLIC LIBRARY ASSURANCE OF COMPLIANCE WITH SYSTEM MEMBERSHIP REQUIREMENTS

Review the list of membership requirements, indicating with a check or an X those that are being met by your library. Unchecked requirements (indicating noncompliance) should be brought to the attention of your system immediately. Non complying libraries will be expected to complete steps necessary to attain compliance with all statutory requirements as soon as possible. Two new assurances have been added to the 2008 public library annual report (assurance of \$2,500 minimum collection expenditures and library hours open per week of at least 20 hours with limited exceptions).

Maintenance of Effort

Indicate whether your municipality's governing body provided funding for your library for **2008** at a level not lower than the average of the previous 3 years (2005, 2006, and 2007).

Indicate whether, as of the date of this report, your municipality's governing body has provided funding for your library for **2009** at a level not lower than the average of the previous 3 years (2008, 2007, and 2006). *If you are unable to determine maintenance of effort for 2008 at this time because of missing data (e.g., an unsettled union contract), please attach a written explanation to the printed copy of this form.*

County or municipal funding which is used to determine the three-year average is defined in *Wis. Statute 43.15(4)(c)5*. The following are not included as funding for purposes of computing the three-year average:

- a. Funding received from a state, federal or private source that has been designated as funding for library services.
- b. Unspent funding appropriated by a municipality or county for library services for a prior year.
- c. For a municipality or joint library, funding received from a county.

Where all library service revenues are provided to the library board, the funding used to calculate the municipal or county three-year average would be the local appropriation for a municipal library or the county appropriation for county libraries. These libraries should classify all income by source (local, county, state, federal, carryover and other) in Section V, LIBRARY OPERATING REVENUE. The funding received by the library from the governing body for three-year average calculation will be the amount on line 1, Section V, for municipal and joint libraries, or the amount on line 2, Section V, for county libraries.

Example: A city public library receives county funds for serving county residents, state aid from the system, and a federal LSTA grant. All of these funds are provided to the library board. In addition, the library receives an annual appropriation from the city (this library's governing body). The library reports all income by source in Section V, LIBRARY OPERATING REVENUE. For three-year average purposes, the amount entered on line 1, local appropriations, is the amount used in checking for compliance.

Public libraries needing assistance in calculating maintenance of effort levels should contact their public library system.

XIV. CERTIFICATION

The signatures of the library director and library board president certifying this report, and its review and approval by the library board, must be provided.

XV. STATEMENT CONCERNING PUBLIC LIBRARY SYSTEM EFFECTIVENESS

In reference to the public library annual report, *Wis. Statute 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. Please provide an explanation of the library board's response.

The statement can be sent directly to the Division for Libraries, Technology, and Community, Learning (DLCL) c/o John DeBacher, P.O. Box 7841, Madison, WI 53707-7841. *The statement page need not be forwarded to your library system with your annual report. The electronic form for this page may also be left blank.* However, the library must file this statement, and as a public document the statement may be provided to your public library system.

Division staff will compile the statements received for each library system. As required by *Wis. Statute 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.