

# 2025 Public Library Annual Report Workshop

Library Development Office – Angela Fox

December 3<sup>rd</sup>, 2025

# What's New for 2025

- Capital Revenue section moved ahead of Expenditures
- Salary Section (11): Number of years the director has held the position at the library
- Compliance with Standards (13): added question on date of last bylaw review (month/year)
- Occasional changes to wording for clarity
- Expenditures section

# Expenditures Section – Additional Places for Non-Op Funds

## **OLD**

- Questions about non-op expenditures related to:
  - Capital expenditures
  - Collection development

## **NEW**

- Questions about non-op expenditures related to:
  - Capital expenditures
  - Collection development
  - Staff expenditures
  - Supplies
  - “Catch-all”: All other non-operating expenditures not yet covered

# What's New: Expenditures

- 06-001 Salaries/wages of all library staff
  - 06-002 Employee benefits
  - 06-003 Other personal services
  - 06-004 Total personal services
  - 06-005 Total staff expenditures – all funds
  - 06-006 Total supplies – op funds
  - 06-07 Total supplies – non-op funds
- 06-001 Salaries/wages of all library staff – op funds
  - 06-002 Salaries/wages of all library staff – non-op
  - 06-003 Employee benefits – op funds
  - 06-004 Employee benefits – non-op
  - 06-005 Other personal services – op funds
  - 06-006 Other personal services – non- op
  - 06-007 Total personal services – op funds\*
  - 06-008 Total staff expenditures – all funds\*
  - 06-009 Total supplies – op funds
  - 06-010 Total supplies – non-op funds

# What's New: Expenditures

- 06-0xx Professional services
- 06-0xx Communication and transportation
- 06-0xx Printing and Advertising
- 06-0xx Insurance
- 06-0xx Utility services
- 06-0xx Repairs and maintenance
- 06-0xx Rentals
- 06-0xx Debt Service
- 06-0xx Lease Rental
- 06-0xx Other
- 06-0xx Total of other services and charges  
*from operating funds*
- 06-0xx Land
- 06-0xx Buildings
- 06-0xx Improvements other than buildings
- 06-0xx Furniture and equipment
- 06-0xx Total capital outlays from operating  
fund expenditures
- All collections-related questions
- 06-0xx Total capital fund expenditures
- 06-0xx All other non-operating fund  
expenditures not yet covered



# Your Ducks

- Contact info for ISL and Vendor
- Reports
- Help documents / worksheets





# Technical Difficulties

- Check with your IT person / department
  - Local issues: firewalls, browsers, etc.
- Contact ISL
  - 1-800-451-6028
  - (317) 234-6550
  - Edit prefilled responses, retrieve passwords, content/meaning
- Call Bibliostat Vendor
  - 1-866-785-9935

# General Instructions

## Time Frame

- Report on the 2025 calendar year
- Exceptions (most current):
  - Contact information
  - Assessed valuation and tax rate
  - Library board members
  - Hourly salaries and benefits

## Unknowns

- Enter zero only if the actual number to report is zero or none



# General Information

Part 1

# General Information

- 01-001 Survey contact
- 01-002 Contact's phone
- 01-003 Time zone in which the library's administrative entity is located
- 01-004 Library name
- 01-005 Library class
- 01-006 Library director
- 01-007 Street address
- 01-008 City
- 01-009 ZIP code
- 01-010 – 01-013 Mailing address
- 01-014 Congressional district number
- 01-015 Phone
- 01-016 Fax
- 01-017 Voicemail/answering machine?

## General Information

- 01-018 Library URL
- 01-019 Library email or electronic contact listed on library's website
- 01-020 Year the current central library was built
- 01-021 Year of the most recent structural addition or alteration to the current central library
- 01-022 Square footage of the central library

# General Information

## Operating Hours

- [01-2023: opens hours table]
- 01-024 Monday opening time
- 01-025 Monday closing time
- ...
- 01-037 Sunday closing time
- 01-038 Total number of hours the central library is open during a typical week
- 01-039 Total number of hours per week the central library is open after 5:00 PM
- 01-040 Total number of hours per week the central library is open on Saturday
- 01-041 Total number of hours per week the central library is open on Sunday

## General Information

- 01-042 Number of weeks per year the central library was open in 2025
- 01-043 Total public service hours the central library was open in 2025
- 01-044 What type of internet access is available in the central library?
- 01-045 Select the nearest download speed of internet access in the central library

# What is a Branch?

- A branch library is an auxiliary unit of an administrative entity which has at least all of the following:
  - Separate quarters
  - An organized collection of library materials
  - Paid staff; and
  - Regularly scheduled hours for being open to the public

# General Information

## Branches

- 01-200 Total number of branches
- Repeat of Central Library questions
  - Name
  - Address, mailing address
  - Last addition and square footage
  - Weeks open
  - Branch hours
  - Branch internet access
- Total annual public service hours of all branches

# What is a Bookmobile?

## **IT IS**

...a traveling branch library.

- Truck or van that carries an organized collection of library material
- Paid staff
- Regularly scheduled hours (stops) for being open to the public

## **IT IS NOT**

- Book bike, car, courier vehicle
- Staffed by volunteers
- Strictly delivery



## General Information

- 01-300 Total number of bookmobiles
- 01-301a Bookmobile name
  - Street address
  - Weeks per year, hours per week
- 01-500 Total system public service hours per year

# Registrations

Part 2

# Registrations

- 02-001 Total number of resident registered users
- 02-002 Total number of users from contracting areas
- 02-003 Total number of **paid** non-resident registered users
- 02-004 Total number of non-resident cards issued to student users
- 02-005 Total non-resident cards issued to school employees
- 02-006 Total number of non-resident cards issued to library employees

# Registrations

- 02-007 Total number of all non-resident registered users
- 02-008 Total number of registered users
- 02-009 Total number of reciprocal users
- 02-010 Total number of PLAC users
- 02-011 Amount of non-resident fee
- 02-012 Date the library board adopted this fee
- 02-013 Does your library annually purge or mark inactive accounts for those patrons who have not used their accounts for the past three (3) years and do not owe materials, fines, or fees to the library?

# Libraries and Political Subdivisions – Part 3

- Assessed valuation, tax rates
  - Gateway, DLGF
- Service Area Populations
  - 2020 Census figures
  - Taxed vs. contracting
  - Update ISL about changes to your service area

## Libraries and Political Subdivisions

- 03-001 Name of primary county
- 03-002 Total assessed valuation for library district
- 03-003 Operating tax rate
- 03-004 Source year for data
- 03-005 Debt fund tax rate
- 03-006 LCPF tax rate
- 03-007 Did your library roll the LCPF into the operating tax rate?
- 03-008 – 03-012 Repeat for additional county (if necessary) Total assessed valuation for additional county

## Libraries and Political Subdivisions

- 03-013 Political subdivision name
- 03-014 Population served by taxation (If the subdivision is served by contract, this line will be blank, or have a ZERO)
- 03-015 Population served by contract (If the subdivision is served by taxation, this line will be blank, or have have a ZERO)
- 03-016 Total district population taxed for library service
- 03-017 Total population served by contract
- 03-018 Total population served (tax + contract)
- 03-019 Were there any changes to your library's service area? (Changes may include annexations, mergers, or changes to contracts.)
- 03-020 If the answer to 03-020 is YES, please explain

# Library Revenue – Part 4

- Local, state, federal, other
- Operating and non-operating funds lumped together
- Reimbursement grants: report money actually claimed, not total awarded



# Library Revenue

## **LOCAL**

- 04-001 Property tax or CEDIT income from library tax rate
- 04-002 Miscellaneous income taxes or LIT (Local Income Tax)
- 04-003 Contractual revenue received for service
- 04-004 Total local government revenue

## **STATE**

- 04-005 Financial Institutions Tax (FIT)
- 04-006 License Vehicle Excise Tax
- 04-007 Commercial Vehicle Excise Tax (CVET)
- 04-008 Broadband Connectivity Grant
- 04-009 Other state revenue
- 04-010 Source(s)
- 04-011 Total state revenue

# Library Revenue

## **FEDERAL**

- 04-012 LSTA grants
- 04-013 Other federal income
- 04-014 Source(s)
- 04-015 Total federal income

## **OTHER**

- 04-016 PLAC reimbursement
- 04-017 Fines and fees
- 04-018 Interest on investments
- 04-019 Gift receipts
- 04-020 Private and public foundation grants
- 04-021 Miscellaneous revenue
- 04-022 Source(s)
- 04-023 Total other revenue

- 04-024 Total library revenue

# Capital Revenue – Part 5

- Site acquisition
- New buildings
- Additions to or renovation of buildings
- Furnishing, equipment, and initial collections for new buildings, building additions, or building renovations
- Computer hardware and software used to support library operations, to link to networks, or to run information produces
- New vehicles
- Other one-time major projects

# Capital Revenue

- 05-001 Local government capital revenue
- 05-002 State government capital revenue
- 05-003 Federal government capital revenue
- 05-004 Other capital revenue
- 05-005 Total capital revenue

# Library Expenditures – Part 6

- Expenditures by category: staff, supplies, collections
- New fields for reporting non-operating expenditures aside from collection and capital. Don't be afraid to report \$0.
- Collection development standard
- Non-resident fee for 2026

# Library Expenditures

- Must report operating and non-operating funds [separately](#)
- Transfers (to LIRF, Rainy Day, etc.) are not expenditures
- Only report money that is actually spent (not just encumbered) during the calendar year. Any encumbered money will be reported when it is actually spent the following year.

# Library Expenditures

Staff and Supplies

- 06-001 Salaries/wages of all library staff – op funds
- 06-002 Salaries/wages of all library staff – non-op
- 06-003 Employee benefits – op funds
- 06-004 Employee benefits – non-op
- 06-005 Other personal services – op funds
- 06-006 Other personal services – non- op
- 06-007 Total personal services – op funds
- 06-008 Total staff expenditures – all funds
  
- 06-009 Total supplies – op funds
- 06-010 Total supplies – non-op funds

# Library Expenditures

Operating Fund:  
Other Services and Charges

- 06-011 Professional services
- 06-012 Communication and transportation
- 06-013 Printing and Advertising
- 06-014 Insurance
- 06-015 Utility services
- 06-016 Repairs and maintenance
- 06-017 Rentals
- 06-018 Debt Service
- 06-019 Lease Rental
- 06-020 Other
- 06-021 Total of other services and charges from operating funds



# Library Expenditures

Operating Fund:

Capital Outlays from Operating Fund  
Expenditures

- 06-022 Land
- 06-023 Buildings
- 06-024 Improvements other than buildings
- 06-025 Furniture and equipment
- 06-026 Total capital outlays from operating fund expenditures

# Library Expenditures

Operating Fund:

Library Collections

- 06-027 Print materials
- 06-028 Other physical materials
- 06-029 Electronic materials (e-books, e-audio, e-video)
- 06-030 Databases and online learning platforms
- 06-031 Public access computers (also includes non-circulating laptops, Chromebooks)
- 06-032 Total operating fund expenditures for collection development

# Library Expenditures

Non-Operating Fund:

Library Collections

- 06-033 Print materials
- 06-034 Other physical materials
- 06-035 Electronic materials (e-books, e-audio, e-video)
- 06-036 Databases and online learning platforms
- 06-037 Public access computers (also includes non-circulating laptops, Chromebooks)
- 06-038 Total non-operating fund expenditures for collection development

# Library Expenditures

Additional Expenditures from Non-Operating Funds

- 06-039 Total capital fund expenditures
- 06-040 All other non-operating fund expenditures not yet covered

# Library Expenditures

Totals

- 06-041 Total exp for print materials
- 06-042 Total exp for other physical materials
- 06-043 Total exp for electronic content
- 06-044 Total exp for public access computers
- 06-045 Total exp for collections (without PACs)
- 06-046 Total exp for collections (with PACs)
- 06-047 Total exp from operating funds
- 06-048 “Other” library expenditures
- 06-049 Total expenditures (operating AND non-operating funds)

# Non-Resident Fee

- Calculate operating expenditures per capita for the report year.  
That is the minimum non-res fee for the FOLLOWING YEAR.
  - When we check to see if your 2025 non-res fee was high enough, we compare it to your 2024 operating expenditures per capita.
  - To be in standards, non-res fee for 2026 must meet/exceed the operating expenditures per capita from 2025.

# Library Expenditures

Non-Resident Fee Standard

- 06-050 Total 2024 operating expenditures per capita
- 06-051 Difference between 2024 OE per capital and non-resident fee (subtract 02-011 from 05-051).
- 06-051a Does your library's non-resident fee meet the standard?
- 06-052 Total 2025 operating expenditures per capita

# Library Expenditures

Collection Development Standard

- 06-053 Collection development expenditure from **all funds** as a percentage of **operating fund** expenditure

**op and non-op** funds spent on collections  
total **operating** funds

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= % of **operating** funds spent on collections

Must be at least **8%**



# Employment Data

Part 7

# Employment Data

Librarians

- 07-001 Total number of all librarians
- 07-002 Total number of paid hours per week for all librarians
- 07-003 FTE for all librarians
- 07-004 How many of the librarians reported in 07-001 have an ALA-MLS degree?
- 07-005 Total number of paid hours per week for all ALA-MLS librarians
- 07-006 FTE for all ALA-MLS librarians

# Employment Data

All Other Staff

Totals

- 07-007 Total number of all other paid staff
- 07-008 Total number of paid hours per week for all other paid staff
- 07-009 FTE for all other paid staff
- 07-010 Total number of all paid staff
- 07-011 Total hours paid per week for all paid staff
- 07-012 FTE for all paid staff
- 07-013 Number of hours per week considered to be full-time employment in your library

# Library Service and Technology

Section 8

# Library Service and Technology

## Interlibrary Loans

- 08-001 Total number of interlibrary loan items (including photocopies) your library has provided to other libraries
- 08-002 Evergreen transits to other libraries
- 08-003 Total number of loans provided to other libraries
- 08-004 Number of interlibrary items (including photocopies) your library has borrowed from other libraries
- 08-005 Evergreen transits received from other libraries
- 08-006 Total number of loans received from other libraries
- 08-007 Net lending rate ( $\frac{\text{\# items loaned}}{\text{\# items borrowed}}$ )

Include	Exclude
<p>All program sessions that are sponsored or co-sponsored by the library. For a program session to be sponsored or co-sponsored by the library, the library must contribute financial resources or staff time toward the program session. For a program session that is part of a larger community event (such as a farmer’s market or festival), it is not necessary for the library to also sponsor or organize the larger event.</p>	<p>Program sessions sponsored by other groups that use library facilities. For example, do not include a homeschooling group hosting a speaker in a meeting room without facilitation from library staff.</p>
<p>Both on-site and off-site program sessions. For example, include a storytime at a farmer’s market or a presentation to a school group about library resources conducted at a school.</p>	<p>Offsite outreach efforts that do not otherwise meet the definition of a program session. For example, do not include having a library card signup booth at a farmer’s market.</p>
<p>Live-streamed virtual (synchronous) program sessions that are sponsored or co-sponsored by the library.</p>	<p>Recorded (asynchronous) presentations of program content; theses should be counted in TOTAL NUMBER OF ASYNCHRONOUS PROGRAM PRESENTATIONS.</p> <p>Programming that is shared on the library’s website or social media that is not sponsored or co-sponsored by the library. For example, do not include sharing a video from an author’s website of him or her reading a book.</p>
<p>Program sessions with attendance of zero or one if they were intended for a group.</p>	<p>Activities delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.</p>
	<p>Passive or self-directed activities that do not occur at a scheduled time. For example, do not include leaving an art project or puzzle on a table for participants to complete.</p>

# Still confused?

- *A program is an intentional service or event in a social setting, developed proactively to meet the needs or interests of an anticipated target audience, at least some of whom attend by choice.*
  - National Impact of Library Public Programs Assessment



# Library Services and Technology

## Programs

- Children Ages 0-5 years
  - 08-008 # of in-person, onsite programs
  - 08-009 Attendance at in-person, onsite
  - 08-010 # of in-person, offsite
  - 08-011 Attendance at in-person, offsite
  - 08-012 Number of live, virtual programs
  - 08-013 Attendance at live, virtual (as county by participant devices)
  - 08-014 Total number programs
  - 08-015 Total attendance
- Children Ages 0-6 years (08-016 – 08-023)
- Young Adults (08-024 – 08-031)
- Adults (08-032 – 08-039)
- General Interest (08-040 – 08-047)



# Library Services and Technology

## Programs - Totals

- 08-048 Total # of in-person, onsite library programs
- 08-049 Total attendance at in-person, onsite library programs
- 08-050 Total number of in-person, offsite library programs
- 08-051 Total attendance at in-person, offsite library programs
- 08-052 Total number of live, virtual library programs
- 08-053 Total attendance at live, virtual library programs
- 08-054 Total number of live (in-person or virtual) library programs
- 08-055 Total attendance at live (in-person or virtual) library programs

# Library Services and Technology

- 08-056 Total number of recorded (asynchronous) program presentations
- 08-057 Total plays of recorded (asynchronous) program presentations
- 08-058 How many weeks of a Children's Reading Program did your library offer at each fixed location?
- 08-059 Number of meeting rooms available for public use
- 08-060 Number of times meeting rooms were used by the public

# Library Services and Technology

## Services

- 08-061 Total number of annual visits to the library
- 08-061a Library visits reporting method
- 08-062 Total number of reference transactions in 2025
- 08-062a Reference transactions reporting method
- 08-063 Instructional reference services (optional)

# Library Services and Technology

Computers and Library System  
Automation

- 08-064 Number of uses (sessions) of public internet computers in 2025
- 08-064a Reporting method for number of uses of public internet computers
- 08-065 Number of wireless internet uses in 2025
- 08-065a Reporting method for wireless sessions
- 08-066 Number of public internet computers system-wide
- 08-067 Number of staff computers
- 08-068 Name of your library's automated bookkeeping system
- 08-069 Brand and version of Integrated Library System

# Holdings and Circulation

Section 9

# Holdings and Circulation

Holdings – Physical Materials

- 09-001 Books (print)
- 09-002 Serial subscriptions (print)
- 09-003 Audio – physical units
- 09-004 Video – physical units
- 09-005 All other circulating physical items
- 09-006 Does your library circulate hotspots?
- 09-007 Total physical items in collection

# Holdings and Circulation

Holdings – Electronic Materials

For each type of electronic holding, answer Y or N to the following question:  
Did the library provide access to the following materials purchased solely by the (library, consortia, or state agency)?

- 09-008 E-books provided by library
- 09-009 E-books provided by consortium
  - 09-009a\* If answer was YES, name of the consortium?
- 09-010 E-books provided by state library

Repeat for...

- 09-011 – 013 E-periodicals
- 09-014 – 016 E-audio
- 09-017 – 019 E-video
- 09-020 – 022 Research databases
- 09-023 – 025 Online learning platforms
- NOTE: all answers for “consortium” will be entered for IDL members.  
All answers for “state library” will be entered by ISL.

# Holdings and Circulation

## Circulation

### Circulation – Physical Materials

- 09-026 Circulation of all physical items: books, audio, video and “other” units), including renewals
- 09-027 Circulation of all children’s physical materials (subset of 09-026)
- 09-028 Circulation of other physical items (subset of 09-026)
- 09-029 Did your library offer automatic renewal for any physical materials during the reporting period?
- 09-030 At the end of the reporting period, does the library charge overdue fines (not replacement costs) to any users when they fail to return physical print materials by the date due?

### Circulation – Electronic Materials

- 09-031 E-book circulation
- 09-032 E-serial circulation
- 09-033 E-audio circulation
- 09-034 E-video circulation
- 09-035 Total circulation of electronic materials (book, serial, audio, video)
- 09-036 Total circulation of all materials (physical and electronic)



# Library Board

Part 10

# Library Board

- 10-0001 Position: President
- 10-0002 First name
- 10-0003 Middle initial/name (optional)
- 10-0004 Last name
- 10-0005 Home address
- 10-0006 City
- 10-0007 ZIP code
- 10-0008 Email address
- 10-0009 Appointing authority
- 10-0010 Date term expires
- 10-0011 Number of consecutive terms
- 10-0012 Date of initial appointment

# Library Board

- Repeated for:
  - Vice President
  - Secretary
  - Treasurer (OR Treasurer/Employee)
  - Members
- 10-0991 What day of the month is the regular library board meeting?
- 10-0992 What is the time of the regular library board meeting?

# Salary and Benefits





Part 11

# Salary and Benefits

Director

- 11-001 Annual salary of the director
- 11-002 Does the library director have an employment contract?
- 11-003 What is the current level of certification held by the library director?
- 11-004 How many years total has the director worked as a director at any library, including this report year?

# Salary and Benefits

11-004	Job Title - Assistant or Associate Director	<input type="text" value="Assistant Director"/>	?	 FLA
11-005	Certification level	<input type="text"/>	?	 FLA
11-006	Minimum hourly wage	<input type="text"/>	?	 FLA
11-007	Maximum hourly wage	<input type="text"/>	?	 FLA

# Salary and Benefits

## Benefits

### Full-Time

- 11-501 PERF
- 11-502 Deferred compensation
- 11-503 Health insurance
- 11-504 Health Savings Account (HSA)
- 11-505 Dental insurance
- 11-506 Life insurance
- 11-507 Vision insurance
- 11-508 Disability insurance
- 11-509 Paid time off for continuing education
- 11-510 Reimbursement for continuing education
- 11-511 Other 1 (specify)
- 11-512 Other 2 (specify)

Repeats for Part-Time 11-513 – 11-524

# Salary and Benefits

## Paid Time Off

### Full-Time Librarian

- 11-525 Number of vacation days
- 11-526 Number of sick days
- 11-527 Number of personal days
- 11-528 Number of holidays
- 11-529 Number of funeral/bereavement days
- 11-530 Number of other days (specify) OR all-purpose PTO

### Repeats for:

- Part-time librarian
- Full-time support staff
- Part-time support staff



# PLAC Loans – Part 12

- Don't report loans **to** your library
- Don't include reciprocal loans or nonresident loans (unless using a PLAC card)
- You do not need to enter zero for libraries – just skip them!

# PLAC Loans

- 12-001 Did your library make any PLAC loans?
- 12-002 Adams Public Library System
- 12-003 Akron Carnegie Public Library
- 12-004 Alexandria-Monroe Public Library
- 12-005 Alexandrian Public Library
- ...
- 12-237 Yorktown Public Library
- 12-238 Total PLAC Loans

# Compliance With Standards for Public Libraries – Part 13

- Mostly Y/N
- (IC 36-12 CODE CITATION)
- Compliance with relevant local/state/federal laws
- Covers
  - Board and director
  - Required plans, policies, and bylaws
  - Long-range plan – including years
  - Resource sharing
  - Website

# Resource Sharing

- You only need to have one of the approved methods of resource sharing to be in standards.
  - Reciprocal borrowing agreement (statewide or local)
  - Evergreen, IDL, or some resource-sharing consortium
  - OCLC

# Statement of Intent to Comply With Standards

Part 14

Please explain any NO answers given in Part 13

# Supplemental Questions

Part 15

# Supplemental Questions

- 15-001 Do you have an attorney for your library?
- If you have used the services of a professional consultant or architect in the last few years, please provide their information here. Click “Add Group” to enter additional consultants.
  - 15-002 Consultant or company name
  - 15-003 Type of consulting service performed
  - 15-004 Street address
  - 15-005 City
  - 15-006 State
  - 15-007 ZIP
  - 15-008 Phone
  - 15-009 Website
- 15-010 What’s something your library did in the past year that you’re proud of?

# Submitting the report

- Must clear all edit checks and answer all required questions you are able to submit the report
- Both library director and board director **MUST** sign the signature page
  - Email preferred!



# Questions?

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