



Annual Report Training Session

Presented February 2011

Northern Lights Library System



It's time to complete your
2010 Annual Report!

The most important thing to
keep in mind is:

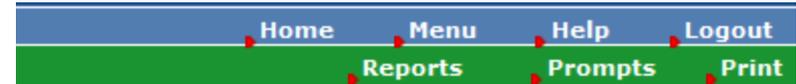
although it may take some
time, this is pretty easy!

What you'll need to complete your Annual Report:

1. The form – this must be done online (LibPas). You should have received your User name and Password from Kerry at Municipal Affairs.
2. The companion guide, found at: www.albertalibraries.ca/grant-information/library-survey-and-annual-report
3. Names, addresses and phone numbers of all of your board members
4. The information email sent to you by Northern Lights, which provides the statistics required for several questions and your Polaris custom report on Annual Reports
5. Patron survey results
6. Patron/in-house/computer use statistics that either you kept as a running tally or collected as a sample for one week.
7. Information on programs and number of participants for each session.



In the top right of the form is the print button. The form will convert to Adobe format which you either open or save. If you print before your board approve it, the word DRAFT will appear on each page.



Verify

Submit/Lock

Review Save

- Alberta Public Library ^
- Personnel
- Collections/Resource
- Circulation
- Reference and Use
- Programs
- Cardholders, Fees, F
- Electronic Performan
- User Satisfaction
- Comments

Previous Next

<< Hide

Data Input

>>

Collection	All
Library	↑
Location	

At the top left you should see the words Data Input. There is a grey box with arrows, which if you click on will open up the section directory. From this box you can also save your work. The save button will not appear until you have enter some information into the form.

Review Save Reset Previous Next

Save Submit/Lock

At the very bottom of the form you can also hit save. The Submit/Lock button is also located here. **DO NOT HIT SUBMIT UNTIL YOUR BOARD HAS APPROVED IT!** Once it's been approved and the date input, hit Submit, then Approve.

Alberta Public Library Survey

Directory

<input type="checkbox"/> Name of Library Board	
<input type="checkbox"/> Name of Library	
<input type="checkbox"/> Library phone	
<input type="checkbox"/> Library fax	
<input type="checkbox"/> Library Email	
<input type="checkbox"/> National Library Code	
<input type="checkbox"/> Website	
<input type="checkbox"/> Library Manager	
<input type="checkbox"/> Library Manager email	
<input type="checkbox"/> Library Manager phone	
<input type="checkbox"/> Library Manager Alternate Phone	
<input type="checkbox"/> Respondent	
<input type="checkbox"/> Respondent email	
<input type="checkbox"/> Respondent phone	
<input type="checkbox"/> Mailing/Street address of Library	
<input type="checkbox"/> City/Town	
<input type="checkbox"/> Province	
<input type="checkbox"/> Postal Code	
<input type="checkbox"/> Date Report Approved by Board	

Fill in information for the respondent, only if someone other than the library manager completes the report.



This box only requires the street address and PO Box.



Do NOT fill in this box until your Board has actually approved it! The form will NOT submit unless this box is filled in, but it will save.



Library Management - Board Members

	Name	Address	Phone	Email	Term Expiry	Councillor
Chairperson	<input type="text"/>					
Board Member 1	<input type="text"/>					
Board Member 2	<input type="text"/>					
Board Member 3	<input type="text"/>					
Board Member 4	<input type="text"/>					
Board Member 5	<input type="text"/>					
Board Member 6	<input type="text"/>					
Board Member 7	<input type="text"/>					
Board Member 8	<input type="text"/>					
Board Member 9	<input type="text"/>					

Library Management - General

<input type="checkbox"/> Board meeting dates	<input type="text" value="mm/dd; mm/dd"/>
<input type="checkbox"/> Volunteer hours - Board	<input type="text"/> <input type="checkbox"/> No Data
<input type="checkbox"/> Building Ownership	<input type="text"/>
<input type="checkbox"/> Library System Membership	<input type="text"/>

ALL fields must be completed. The Term Expiry box will only accept dates up to 2014, as the length of a term is only three years. You may not have more than two town councilors on your Board.

The volunteer hours for the Board are for the combined total time they spend in board meetings or performing other board functions. If a board member runs a program or helps with inventory, this gets counted later on as volunteer hours.



Library Hours

Hours of Service

Provide the actual open hours for the library for each day of the week at the time of completing this report.

Also, enter the number of hours open per week based on the indicated library open ...more

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total Hours
Library Hours	<input type="text"/>							
July and August Hours	<input type="text"/>							

Total Number of library hours open per year

There are two possible calculations:

1. If your library hours are the same all year: 50 regular weeks per year x number of hours
2. If summer hours differ from regular hours: [(50 - # summer weeks) x number of hours] + (# summer weeks x number of hours)

Hours Open per Year

Plan of Service

Boards are required to deposit a copy of the current Plan of Service with Public Library Service Branch at least once every five years. What are the years covered by the current Plan of Service? (enter the year only)

	From	To
Years covered by the current Plan of Service	<input type="text"/>	<input type="text"/>

Make sure you scroll all the way to the right to fill in the total hours for the week. This is one total box that is **not** self-populating! Another is the Hours Open per Year. Calculate according to the directions on the form.



Personnel

Paid and unpaid staff that worked in the library in the reporting period.

Staff

Report qualifications and the number of all paid staff who work for the library whether they are paid directly by the board or paid through the municipality. Report total number of employees (i.e., ...more

	# Employees	Total Hours/Yr
Professional Librarian	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Other University Degree	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Library Technician	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Library Operations Assistant	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Other Tech/College	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Other Paid Positions	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Total Staff	<input type="text"/>	<input type="text"/>

Volunteers

Many public libraries in Alberta rely on volunteers to staff the library at least part of the time or to provide supplementary services. We are interested in how many volunteers hours are ...more

	# Volunteers	Volunteer Hours/Yr
Library Operations	<input type="text"/> <input type="checkbox"/> Not Applicable	<input type="text"/> <input type="checkbox"/> Not Applicable
Library Programming	<input type="text"/> <input type="checkbox"/> Not Applicable	<input type="text"/> <input type="checkbox"/> Not Applicable
Fundraising	<input type="text"/> <input type="checkbox"/> Not Applicable	<input type="text"/> <input type="checkbox"/> Not Applicable
Outreach	<input type="text"/> <input type="checkbox"/> Not Applicable	<input type="text"/> <input type="checkbox"/> Not Applicable
Friends of the Library	<input type="text"/> <input type="checkbox"/> Not Applicable	<input type="text"/> <input type="checkbox"/> Not Applicable
Total Volunteers	<input type="text"/>	<input type="text"/>

A professional librarian is someone with a Masters degree in Library Science only!

This year there are no separate boxes for full time/part time/ and temporary employees. Combine your staff by level of education to calculate the total hours of your employees in each category. The Total Staff boxes are self-populating.



Collections/Resources

Print materials

Books - Print: In this section, include all books (in all categories) in print format. Include both catalogued and uncatalogued books. Do not include audiobooks, e-books or MP3 books. They will be recorded in subsequent categories.

<input type="checkbox"/> Print materials from previous year ↗		
<input type="checkbox"/> Volumes acquired ↗		
<input type="checkbox"/> Volumes withdrawn ↗		
<input type="checkbox"/> Total print volumes ↗		
<input type="checkbox"/> Subscriptions ↗		

Non-print materials

Provide a count of each physical unit for a non-print item by category. DEFINITION: A physical unit of library material distinguished from other single units by a separate binding, encasement or other clear distinction.

<input type="checkbox"/> Audiobooks ↗		
<input type="checkbox"/> Music recordings ↗		
<input type="checkbox"/> Videos ↗		
<input type="checkbox"/> CD-ROMS ↗		
<input type="checkbox"/> Microforms/Microfiche/Microfilm ↗		
<input type="checkbox"/> Other ↗		
<input type="checkbox"/> Total Non-print ↗		

Information on users, circulation and collections can be found within Polaris under Utilities >Reports and Notices > Custom > Annual Report

Please use this report by entering:

Parent – Northern Lights Library System

Library – Your library name

Date parameters (start and end)– January 1, 2010 to December 31, 2010



Online/electronic collections (licensed by your Board)

If your library board licenses any electronic resources such as e-books, MP3 books, magazine subscriptions, movies or databases, include those items in this section. Count only items licensed by your board. Do not count databases licensed by your library system or consortia such as TAL in this section.

<input type="checkbox"/> Online/electronic books		
<input type="checkbox"/> Online/electronic magazines/newspapers		
<input type="checkbox"/> Online/electronic audio books		
<input type="checkbox"/> Online music recordings		
<input type="checkbox"/> Online movies		
<input type="checkbox"/> Online other		
<input type="checkbox"/> Other databases		

Generally speaking, libraries within Northern Lights would not have anything to report here, as TRAC does the licensing for the online databases. If, however, your library has purchased subscriptions to items outside of what is provided through NLLS and TRAC, or have a digitized collection and have them accessible through your library's webpage, then you would list them here. You list the number of databases, etc., not the usage stats. If you wish to include usage stats, you would do so in the comments section at the end of the form.



Totals		
Total physical collections 		
Total electronic/licensed items 		
Total collections 		

This section should self-populate.



Circulation

Direct circulations
Report number of items circulated directly to library users. Include all items that are charged out for use, whether the use is inside or outside the library. Do not include interlibrary loans loaned to other libraries.

<input type="checkbox"/> Adult print		
<input type="checkbox"/> Juvenile print		
<input type="checkbox"/> Adult non-print		
<input type="checkbox"/> Juvenile non-print		
<input type="checkbox"/> Magazines/newspapers		
<input type="checkbox"/> Online/electronic circulation		
Total Direct Circulation		
<input type="checkbox"/> Bulk Loans		
Total Circulation		

Interlibrary Loan
Please report the source and destination of all items borrowed and lent between libraries.

	Borrowed	Lent
within Alberta, including within library system		
inter-provincial		
outside Canada		
Total		

Ratios

<input type="checkbox"/> Circulation per Capita	
<input type="checkbox"/> Turnover Rate	

The information for Direct Circulation is in the Polaris Annual Report under section 15. Online/Electronic circulation refers to your OverDrive. This information was also sent out to you in an email. Bulk loans refers to items lent out as a block to seniors centres, schools, hospitals, other libraries, etc.

The interlibrary loan information was sent out to you in an email. To access the information on inter-provincial and outside Canada loans and borrowing, refer to the emailed instructions on how to get this report in VDX.

The ratios section requires population information that has not yet been added to this form. Leave it blank.



Reference and Use

Reference Transactions

Report the number of reference transactions for the year. Do not include directional or administrative questions

<input type="checkbox"/> Person to person reference encounters		
<input type="checkbox"/> Telephone or fax reference encounters		
<input type="checkbox"/> Electronic/online reference encounters from email or website		
Non-electronic/online reference transactions during reporting year		
Total of all reference transactions during reporting year		
Electronic/online reference as a percentage of total reference		

You should have been collecting this information during 2010, either on a typical week and multiply your results by 50, or throughout the year.

The bottom three items in this section self-populate.



Library Use		
Library users and in-house use of materials		
<input type="checkbox"/> Annual Visits/Library Users		
<input type="checkbox"/> Visits to library website		<input type="checkbox"/> Not Applicable
<input type="checkbox"/> Visits to library catalogue		<input type="checkbox"/> Not Applicable
<input type="checkbox"/> Virtual Visits		
<input type="checkbox"/> In Library Material Use		

The first item here is a stat you should have been collecting either throughout the year or during a typical week.

You will have received the Google analytics page in an email from Kelly. The number to use is Visits, not views or visitors.

Visits to library catalogue will be included in the system report, so you do not need to fill this box in, but click Not Applicable.

Virtual Visits is self-populating. In Library Material use is in-house use of books, magazines, etc. Either your library does this daily all year, or estimates based on a one week count (X50)

Programs

	Sessions	Participants
Create Young Readers		872
Learn to read and write		685
Satisfy curiosity		0
Build Successful Enterprises		12
Make Career Choices		
Visit a Comfortable Place		
Know Your Community		240
Make Informed Choices		0
Celebrate Diversity		0
Succeed in School		0
Get Facts Fast	8	4
Be an Informed Citizen	0	0
Understand how to Find Evaluate & Use Information	0	0
Discover Your Roots	0	0
Connect to the Online World	25	25
Express Creativity	2	8
Stimulate Imagination		
Welcome to Canada		
Total	244	1,766
Library Awareness	6	83
Total (Calculated)		

Indicator Notes

This is often useful for recording details about interpretation of the definition in local terms. Examples: who to contact for information, a translation of the text, etc.

Indicator	Children's Literacy Sessions
Derivation	
Description	Early literacy. Children from birth to age five will have programs and services designed to ensure that they will enter school ready to learn to read, write, and listen.

Notes

By clicking on the program listed on this form, a window opens, giving a description of what the phrase is referring to. The categories match up to the 18 Library Service Responses. The participants column is for total participants, not average. Library awareness is when you are showing a group how the library works, like the Dewey Decimal system, for example. Totals boxes in this section are self-populating.



Cardholders, Fees, Facilities

Cardholders

	Resident		Non-resident	
Individual cardholders	<input type="text" value="749"/>	<input type="checkbox"/> No Data	<input type="text" value="1"/>	<input type="checkbox"/> No Data
Family cards	<input type="text" value="0"/>	<input type="checkbox"/> No Data	<input type="text" value="0"/>	<input type="checkbox"/> No Data
Total	<input type="text" value="749"/>		<input type="text" value="1"/>	

Total cardholders

Total Cardholders <input type="text" value="750"/>	<input type="text" value="750"/>
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The indicator notes for this section state that only ACTIVE cardholders should be included (not expired). Total boxes will self-populate. This information is on the Annual Report custom report in Polaris.

Polaris does not keep track of # of family cards; you will have to determine this number yourself.



Card fees		
<input type="checkbox"/> Resident Adult		
<input type="checkbox"/> Resident Juvenile		
<input type="checkbox"/> Resident Senior		
<input type="checkbox"/> Resident Family		
<input type="checkbox"/> Resident Other		
<input type="checkbox"/> Resident - Other (explanation)		
<input type="checkbox"/> Nonresident Adult		
<input type="checkbox"/> Nonresident Juvenile		
<input type="checkbox"/> Nonresident Senior		
<input type="checkbox"/> Nonresident Family		
<input type="checkbox"/> Nonresident Other		
<input type="checkbox"/> Non-resident - Other (explanation)		

Library facilities		
<input type="checkbox"/> Library Area (Sq. Meters)		
<input type="checkbox"/> Library Area (Sq. Ft)		

Do NOT list the \$60 for Northern Lights non-resident fees. (It's counted on our system report). If you don't know the square footage of your facilities, check past reports. You will only be able to fill in sq. meters. If you only know sq footage, go to a website on metric conversion. www.metric-conversion-tables.com/autometricconversionarea.htm



Electronic Performance Measures

Workstations

<input type="checkbox"/> Workstations with internet access	
<input type="checkbox"/> Workstations without internet access	
Total Workstations	
<input type="checkbox"/> Wireless Access (Y or N)	

Workstations sessions

<input type="checkbox"/> Number of workstation sessions		Description Report the number of separate times each public workstation was in use, either during a one week survey undertaken during a typical week (multiply by 50 to arrive at an annual figure) or provide an actual count of sessions for the year.
<input type="checkbox"/> Workstation hours		
<input type="checkbox"/> Length of workstation sessions (minutes)		

Workstation users

<input type="checkbox"/> Workstation Users per Year		Description Report the total hours that public workstations were actually used. If workstation sessions are 1 hour in length, then it is a simple matter of tracking the total number of sessions and reporting the number of hours. If workstation session times vary, then there will have to be some kind of method employed to determine the actual hours that the workstations are in use.
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If you are in a school-housed library and some of your computers are owned by the school, do NOT include them in this number.

These tallies are for the year (may be based on an average week usage).

Users and sessions are different in that a user could have activated more than one session.



User Satisfaction

Rating averages

Please report the rating average from 1-5 for the survey questions

This section will accept decimal places, eg. 4.7

<input type="checkbox"/> Surveys completed		
<input type="checkbox"/> Satisfaction with Staff		<input type="checkbox"/> No Data
<input type="checkbox"/> Satisfaction with Collections		<input type="checkbox"/> No Data
<input type="checkbox"/> Satisfaction with Info Services		<input type="checkbox"/> No Data
<input type="checkbox"/> Satisfaction with Facilities		<input type="checkbox"/> No Data
<input type="checkbox"/> Satisfaction with e-Resources		<input type="checkbox"/> No Data
<input type="checkbox"/> Satisfaction with Hours		<input type="checkbox"/> No Data
<input type="checkbox"/> Overall Satisfaction		<input type="checkbox"/> No Data

User success

What percentage of people surveyed found what they were looking for?

<input type="checkbox"/> Yes		<input type="checkbox"/> No Data
<input type="checkbox"/> No		<input type="checkbox"/> No Data
<input type="checkbox"/> Partly		<input type="checkbox"/> No Data

Comments

Please share any comments or concerns expressed by your library users on the Library Satisfaction Survey

<input type="checkbox"/> Library user comments	
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The comment box is expandable, so include ALL comments submitted. When you print the page, not all the comments will print, but they will be seen on the final form sent to Municipal Affairs after you Submit/Lock it.

Comments	
<input type="checkbox"/> Accomplishments 	
<input type="checkbox"/> Comments 	

Include any building renovations, new programs, or anything that you want to toot your own horn about –they won't know what an awesome job you're doing unless you tell them.

Hit SAVE. Do NOT hit Submit until your board has approved this document and you have entered the date of their approval at the top of the form in the Directory section. (It won't go through anyway without this date).

Go to the top of the form to print it off for your board to view. It will open in Adobe with the watermark DRAFT on it.

- Hit SAVE.
 - Double check that all of the information is complete.
 - Enter the date on which the board approved it.
 - Make 2 hard copies: 1 for your files, 1 for NLLS.
 - Hit the Submit/Lock then the Approve button in LibPAS to send it to Municipal Affairs before March 31.
 - Any Questions???
- Please send them to the HelpDesk.



Thank you!