Annual Report for Public and Association Libraries 2024
Outline of Major Changes

Important

- The State Library due date of the annual reports will be March 1, 2025.
- The report now saves automatically after every new entry or change.
- Multiple users can now view and edit reports at the same time. When logging in, you will receive a pop-up message notifying you if someone else is also using the report to enable coordination.
- All questions, including those in repeating groups, can now display last year's entry as well as the 5 years preceding that (by clicking *History*). Note: only this and last year's entries are able to be printed.
- All libraries will continue to use the [Baker & Taylor interface](#) to enter their 2024 data.

Other Notes

- IMLS has issued a new set of 22 questions intended to more clearly and accurately record electronic collections and usage. These are voluntary for this report, but we encourage libraries to complete them as this will help us make adjustments if needed. All but 4 are simple Yes/No questions, and the remaining simply break e-material circulation into e-books, e-serials, e-audio, and e-video. To reduce disruption, all of these have been placed in section 5.
- There will be some amount of re-numbering due to a small amount of questions added, removed, or re-ordered since the 2024 Annual Report. Not all instances of re-numbering are noted in this outline.
- Please see updates in Instructions and note the rewording in questions and Instructions. Not all changes are noted in this outline.
- Instructions intended for more than one question are marked as such.
- On the Edit Check Review page, when an Edit Check is resolved with a note, the red exclamation point becomes a large green check mark. Note that All Edit Checks must have green check marks before the report can be submitted.

Tips and Tools

- Auto-save is now enabled, but it is recommended to save often to ensure data retention. The Save button is located at the top and bottom of each page. (On some pages, you may have to scroll down.)
- To print the report with page numbers, click on the Printer icon in the menu at the top of the page, go to "Show Web Report" and then Control-P for Print.

2024 Changes to Part 3: Library Programs, Policies, and Services

Renamed and Restructured Sections
- Section 5 has been renamed from *Technology and Telecommunications* to *Electronic Use*, with subsections *Electronic Holdings* and *Databases / Online Learning / E-Material Circulation*

Restructured Questions

- E-Rate questions have been moved from Section 5 to Section 4 as Questions 4.18 to 4.20

2024 Changes to Part 2: Library Collection

- Questions 2.13 - 2.28 have been deleted
- Q2.15 Other Circulating Physical Items instructions have been changed to clarify that Vox and Wonderbooks should be entered here.

2024 Changes to Part 3: Library Programs, Policies, and Services

- Guidance was added to clarify that:
  - If no programs within a category were offered/attended, 0 should be entered. If they were offered/attended but that data is not available, M (Missing) should be entered. N/A should not be entered for any programs.
  - Summer Reading, Early Literacy, Adult Literacy, ESOL, and Digital Literacy programs are subsets of Live and Prerecorded programs and should be entered in those sections as well as in the appropriate subsequent section.
- Instructions for Q3.29 have been updated to add that live online program sessions that are recorded and posted online later should be counted.
- Instructions for Q3.30 have been updated to add that plays of audio recordings should also be counted here.
- Instructions for Q3.31 and Q3.32 have been updated to clarify that One-on-One program sessions may occasionally have an attendance of more than one but if this happens repeatedly these should be reported as regular sessions, and that One-on-One program sessions with zero attendees should not be reported. And to clarify that for make-and-takes libraries should count each kit prepared as one session, and each kit picked up as one attendee.
- New questions 3.34b to 3.34e have been added to reflect library use of social media.
- Instructions for Q3.59 have been updated to clarify that Combined Audience Programs are programs aimed at both children aged birth through five years and parents or caregivers of children aged birth through five years.

2024 Changes to Part 4: Library Transactions

- Questions 4.12 to 4.16 have been deleted
- A new question, 4.13, has been added for reporting whether a library offers automatic renewals
- Instructions for Q4.14 Reference Transactions have been updated to clarify that both scheduled and unscheduled sessions should be included, and that formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements should not be. Formal instruction should be counted as a program, and simple directional/informational information does not meet the threshold of a reference transaction.

2024 Changes to Part 5: Electronic Use

- Questions 5.1 to 5.6 and 5.10 to 5.12 have been deleted and restructured as 22 new questions. These were added by IMLS that will be required to be answered for the 2025 report and are voluntary for this year. All questions are simply reformulated methods of gathering data that has been previously required; no new data gathering should be needed by libraries to answer these questions. Most of these are simple yes/no/unknown questions:
    - 5.1 Did the library provide access to e-books purchased solely by the library?
    - 5.2 Did the library provide access to e-books purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?
    - 5.3 Did the library provide access to e-books provided by the New York State Library at no or minimal cost to the library?
    - 5.4 Did the library provide access to e-serials purchased solely by the library?
    - 5.5 Did the library provide access to e-serials purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?
    - 5.6 Did the library provide access to e-serials provided by the New York State Library at no or minimal cost to the library?
    - 5.7 Did the library provide access to e-audio purchased solely by the library?
    - 5.8 Did the library provide access to e-audio purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?
    - 5.9 Did the library provide access to e-audio provided by the New York State Library at no or minimal cost to the library?
    - 5.10 Did the library provide access to e-videos purchased solely by the library?
    - 5.11 Did the library provide access to e-videos purchased via a consortium, cooperative, or other similar group at the local, regional, or state level? (Do not include New York State Library-provided content here; that should be entered in 5.12.)
    - 5.12 Did the library provide access to e-videos provided by the New York State Library at no or minimal cost to the library?
    - 5.13 Did the library provide access to research databases purchased solely by the library?
    - 5.14 Did the library provide access to research databases purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?

- o 5.15 Did the library provide access to research databases provided by the New York State Library at no or minimal cost to the library?
  - o 5.16 Did the library provide access to online learning platforms purchased solely by the library?
  - o 5.17 Did the library provide access to online learning platforms purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?
  - o 5.18 Did the library provide access to online learning platforms provided by the New York State Library at no or minimal cost to the library?
- The others break E-Material Circulation (previously Question 4.12) into four components:
  - o 5.19 The total circulation of e-books during the reporting period.
  - o 5.20 The total circulation of e-serials during the reporting period.
  - o 5.21 The total circulation of e-audio during the reporting period.
  - o 5.22 The total circulation of e-videos during the reporting period.

2024 Changes to Part 6: Staff Information

- Guidance at the start of the section has been updated to clarify that all staff questions refer to paid staff.

2024 Changes to Part 9: Service Outlet Information

- Guidance at the start of the section has been updated to clarify that if a new outlet was open in the reporting year for any amount of time, it must be entered here, and that even if an outlet was closed for the entire year it still must be reported and not simply left out of reporting. Permanently closed outlets will be removed and not appear in subsequent reports.

2024 Changes to Part 10: Officers and Trustees

- Guidance at the start of the section has been updated to clarify that entries should reflect Officers and Board Members as of February 1 of the CURRENT year (2025).

2024 Changes to Part 12: Operating Fund Disbursements

- Instructions for Q12.7 have been updated for clarity and simplification.
- Instructions for Q12.8 have been updated to add circulating portable electronic devices, and materials in new formats.
- Question name and instructions for Q12.45 have been updated to clarify that this refers to a *separate* Capital Fund.

Tips for Reporting Live Programs in Part 3
Include

- All program sessions that are sponsored or cosponsored 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 farmers' market or festival), it is not necessary for the library to also sponsor or organize the larger event.
- Examples of live programs include live story hours, film or movie showings, puppet shows, lectures, or concerts.
- Both in-person on-site and in-person off-site program sessions. For example, include a story time at a farmers' market or a presentation to a school group about library resources conducted at a school.
- Live-streamed virtual program sessions that are sponsored or co-sponsored by the library.
- Program sessions with attendance of zero or one if they were intended for a group.

Exclude

- 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.
- 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 farmers' market.
- Prerecorded (previously called asynchronous) presentations of program content. For example, exclude any recording of program content (such as a prerecorded story time) that cannot be viewed live as it unfolds. These should be counted in Total Number of Prerecorded Program Presentations (Q3.29).
- Programming that is shared on the library's website or social media that is not sponsored or cosponsored by the library. For example, do not include sharing a video from an author's website of them reading a book.
- 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.
- 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. Activities differ from programs in that activities are unstructured and depend on the participation of the attendee to create the experience, rather than a structured presentation offered by librarian to a group at a set time.
- Take and Make kits that are not part of a synchronous program such as a story hour should be reported under Q3.31, One-on-One Program Sessions, and Q3.32 One-on-One Program Attendance. Count each kit prepared as one session, and each kit picked up as one attendee.