

PUBLIC LIBRARY TRUSTEE NEWSLETTER

January 2020



The What, How, and Whys of the Library Annual Report

By Clairellyn Sommersmith, Assistant Director
Winnefox Library System

In the coming weeks, or perhaps even at this board meeting, your director will be presenting you with a document headed the “Wisconsin Department of Public Instruction. Public Library Annual Report,” and your job is to approve it. But what is the Library’s Annual Report? What does it contain? And why was it created?

What is the Annual Report?

The Annual Report is the required standardized documentation for all public libraries in Wisconsin. Every year, directors are required to compile end of year statistics, which are then sent and held by the Department of Instruction, Division for Libraries and Technology.

Why is the Annual Report required?

First, it is required by law. Section 43.58(6)(a) of Wisconsin Statutes requires that library boards make a report to the DPI within 60 days of the end of each fiscal year. The board is also required to confirm if the library system has provided effective leadership and has met the needs of the library. This is an opportunity for a library board to report to the state if they are dissatisfied with their library system in anyway.





What does the Annual Report contain?

The Annual Report contains fourteen sections which cover the library's finances as well as library materials, facilities, personnel, operations and "such other information as the division requests."

As you are looking through the Report provided by your director, you may be interested in a couple of specific sections. In Section IV for example, Library Governance, you want to make sure trustee information, address, phone, and email, is correct and current.

The following five sections, V through IX, include all the library's financials. As the Library Board is chiefly responsible for the library's financial management, and Trustees are custodians of community tax dollars, these sections are perhaps the ones you want to pay the most attention to. If you have additional funds beyond the support of the municipality, your director will have to supplement the Report with these figures as well.

Other sections include circulation, user, and programming statistics, as well as staffing information. The Annual Report concludes with the "Public Library Assurance of Compliance with System Membership Requirements." This Assurance confirms that your library is in accord with the requirements of a public library in the state of Wisconsin. Some of these requirements include the director's education and hours worked, the library's collection spending, and the board membership and duties.

What is next?

After the Annual Report is approved by the Library Board, it is sent both to your library's system and the Division, where it will be held on file and digitized. The Department of Public Instruction has posted annual report data from 1996 through 2018 online at <http://dpi.wi.gov/pld/data-reports/service-data>, so anyone can study this data. Having each of the more than 380 public libraries in Wisconsin answer the same questions in the same way makes it easier to make comparisons. Want to know what other library directors of similar sized libraries are making? Or how many programs they run, hours they're open, or items they circulated? All these answers are in the Annual Reports.

Save the Dates 2020

WILD WISCONSIN WINTER
WEB CONFERENCE
January 22-23

LIBRARY LEGISLATIVE DAY
February 11
Hotel deadline: January 17

ANNUAL REPORTS DUE
February 29

WISCONSIN ASSOCIATION OF
PUBLIC LIBRARIES (WAPL)
ANNUAL CONFERENCE
April 29 - May 1, Oshkosh

A Beginner's Guide to Library Legislative Day

By Bradley Shipps, Director
Outagamie Waupaca Library System

Every year on a Tuesday in February, the Wisconsin Library Association hosts Library Legislative Day. Library supporters from across the state gather in Madison to meet with state legislators and share the value of libraries in our communities.

While many library directors and staff attend Library Legislative Day, the participation of Library Trustees, Friends of the Library, and library

Senator and Representative. If you're not sure, you can look that up under "Who are my legislators?" on this site: <https://legis.wisconsin.gov/>.

Many people arrive the evening before Legislative Day and enjoy dinner in Madison with library colleagues and friends. Legislative Day begins with registration and a continental breakfast. WLA will schedule the appointments with legislators, and you will receive your schedule at the registration table.

At 9:00 am, all Legislative Day participants gather for a briefing session where you will learn about advocacy efforts and priorities from WLA leaders and our lobbyist. Other speakers may include



patrons has the greatest impact. Legislators want to hear from you!

In a budget year, Library Legislative Day attendees lend their support to the funding priorities outlined by WLA. In an off-year like 2020, the focus of the event is to thank legislators for their support in the prior budget cycle, to tell them how we're using state library aids to provide services that enrich communities, and to build relationships that will translate into strong library support for many budget cycles to come.

If you have never been to the capitol in an advocacy role, this may seem daunting, but it's actually a lot of fun! Here's how it works.

Plan to register online or by mail by mid-January. When registering, you will be asked to list your

officials from the Department of Public Instruction and legislators who are already library champions. In 2019, Governor Tony Evers was among the speakers!

After the briefing session, you will go to your first appointment with a legislator with a group of other library advocates from your district. Often your meeting will be with the legislator's aides. Don't be discouraged! These staffers have the trust of their employers, and your messages will be shared.

You will be well prepared with talking points shared at the briefing session, and you are strongly encouraged to share personal stories of how your library positively impacts you and your community.

After your first appointment, enjoy lunch with a

group of friends at any of the great restaurants within walking distance of the capitol building. If you traveled to Madison alone, form an impromptu lunch group, and make some new friends!

You will have another appointment scheduled for the afternoon. All appointments are finished by 3:30pm, and your day is done, but there is one important step left. Be sure to send a note to your legislators and/or their staff thanking them for their time and support. Handwritten thank-you notes have become a hallmark of WLA advocacy, and it's a great thing to be known for.

Please consider making Library Legislative Day part of your library board service!

Details and registration: <http://wla.wisconsinlibraries.org/legislative/legislative-day>

See also: Trustee Tale 13: Library Advocacy, <https://bit.ly/2FiSawJ>

FAQ

Our board meeting falls early in February, but our annual report won't be ready for approval by then. Can we approve our annual report at the March meeting?

Per Wisconsin Statute 43.58 (6)(a), the library board's annual report to the Wisconsin Department of Public Instruction's Division for Libraries and Technology must be completed and filed within 60 days after the conclusion of the fiscal year of the municipality or county in which the library is located. Because the deadline is written into statute, the Division does not have the authority to extend it. Your best course of action is to reschedule your February board meeting for later in the month.

If you miss the statutory deadline, the Division will send a letter of non-compliance to all library trustees and to the board of the public library system to which the library belongs. The library will be required to submit a plan to the Division in writing, addressing how the library will submit future Public Library Annual Reports on time. If the library board fails to correct their non-compliance with statute, the Division may delay or withhold state aid from the library system.

On behalf of your systems, please approve annual reports on time!

Trustee Tale is written and distributed by Manitowoc Calumet Library System, Nicolet Federated Library System, Outagamie Waupaca Library System, and Winnefox Library System. Distribution to your board is funded by your home system.

If you have questions, comments or suggestions for future articles, send them to:

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