:08
Anne: Hi everyone, thank you for joining us for this Digital Byte. My name is Anne Hamland, the public library services consultant for Wisconsin Valley Library Service. And today, we'll be talking about how to record your programming statistics in the Wisconsin Public Library Annual Report.

As you're well aware, programming plays a crucial role in library services, so we want to make sure that you're documenting your hard work accurately.

So, I am here for you at the system level and I can help with any questions you might have about the annual report with my team here at Wisconsin Valley Library Service, but today we have a special guest from the Wisconsin Department of Public Instruction.

This is Tessa Michaelson Schmidt ,and you might recognize her from past WVLS workshops or Youth Services email or Inclusive Services email in your inbox. So Tessa is going to introduce herself and walk us through details of annual report and also a new tool that's going to help us with recording our programming statistics.

1:16:
Tessa: Thanks Anne, glad to be here for you. So like Anne said, I work at the Wisconsin Department of Public Instruction, which is the home of the State Library agency and the work that I'm going to share with you today comes from the public library development team, where we all work to support systems and local library staff such as yourself with the annual report and what that looks like at annual report time, as well as during the rest of the year.

So today, we're going to be looking at the big picture of the annual report when it comes to programs and self-directed activities, talking about vocabulary and distinction such as "I know what a program is but what's a self-directed activity?" And then as Anne indicated, a detailed walkthrough of our new data tracking sheet, and so by the end of the video, I hope you will feel more confident about completing or contributing to the public library annual report, as well as have a solid plan in place for keeping track of data from month to month.

2:11:
Tessa: So let's get started by looking at the big picture. The library director is usually the person completing the public library annual report, but depending on the size of the library, many rely on library staff for data about different areas of library services such as youth services or adult services. Therefore, it's critical that all library staff reporting on any kind of event understand how to collect and report this information accurately for local, statewide and national impact. The numbers collected really matter. Now, Wisconsin Public Library directors receive information about completing the annual report mid-January each year. The report collects information about the library's activities in the previous year, so in January 2020 for example, directors will begin reporting on all activities that took place in 2019. State statutes require that

annual reports be filed within 60 days after the conclusion of the fiscal year of the municipality or county in which the public library is located.

3:21

Tessa: One of the most important things for the annual report related to programs and self-directed activities is ages. So the federally defined age of children again for the purposes of the public library annual report is library users ages 0 or birth through 11. Young adult age is defined as ages 12 through 18 years and includes 18 year olds. On the Wisconsin Public Library annual report other or all-ages applies to a group count for a planned event for whom the audience is not strictly children or young adults. This includes adults and seniors as well as events that are cross generational or just not specific to any one target age group. So those are the definitions of "Ages" for the purposes of the annual report. Now, let's talk about the definition of programs. Programs and program attendance annual count are federally defined and required data elements on the Wisconsin Public Library annual report. A library program is a planned event, which introduces the group attending to any of the broad range of library services or activities 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.

4:56:

Tessa: Examples of these types of programs include film showings, lectures, story hours, literacy, English as a second language, citizenship classes, and book discussions, as well as many other kinds of programs. When you count programs, count ALL programs, whether they're held on site at the library or off-site, as long as they are sponsored or co-sponsored by the library. If programs are offered in a series, make sure to count each program as an individual program in the series. Things to exclude include Library activities that are delivered on a one-to-one basis rather than to a group; notice group attending is in yellow, that's because that's really crucial when defining a program. So exclude things that are offered on a one-to-one basis such as literacy tutoring, services to the homebound, homework assistance, and mentoring activities. Also, exclude any library related meetings, such as Teen Advisory Board meetings, Library Board, Library Foundation, Library Friends group or anything like that.

6:08:

Tessa: When you are totaling the number of people who attended programs, you really need to think about who is the targeted age for the program - doesn't matter who came - but who was the program intended for. So for example, a children's program is a planned event for which the primary audience is children age 11 and younger. For the attendance count, count ALL patrons who attend that program, this might include young adults or adult caregivers who come to a program for children, count everybody who comes. Similarly, a young adult program is a planned event for who it's the primary audience is young adults 12 to 18 for the attendance count all patrons who attend that program including children and adults. Other programs or other all ages includes any planned event for which the primary audience is not strictly children or young adults. This could be a program just for adults, or program that is intergenerational

mixed ages, so again, who's the target audience, then count everybody who comes in that age group.

7:35:

Tessa: Next, we're going to talk about self-directed activities. Self-directed activities and the participation annual count is a required data element unique to the Wisconsin Public Library Annual Report. It was formerly known as drop-in activities. A self-directed activity is a planned, independent activity, available for a definite time period, which introduces individuals participating to any of the broad range of library services or activities which directly provide information to participants. Activities may cover use of the library, library services or library tours. Activities also provide cultural, recreational or educational information often designed to meet a specific social need. Activities differ from programs and then activities are unstructured and depend on the participation of the individual to create the experience, rather than a structured program offered to a group at a set time. So again, independent or individual is what we're highlighting here versus group attending as part of the definition for a program. Examples of self-directed activities include do-it-yourself stations, 1,000 books before kindergarten reading challenge, and a frequent reader club. Now again, you would count all self-directed activities whether held on or off-site, as long as they're sponsored or co-sponsored by the library.

8:51:

Tessa: It was formerly known as drop-in activities. A self-directed activity is a planned, independent activity, available for a definite time period, which introduces individuals participating to any of the broad range of library services or activities which directly provide information to participants. Activities may cover use of the library, library services or library tours. Activities also provide cultural, recreational or educational information often designed to meet a specific social need. Activities differ from programs and then activities are unstructured and depend on the participation of the individual to create the experience, rather than a structured program offered to a group at a set time. So again, independent or individual is what we're highlighting here versus group attending as part of the definition for a program. Examples of self-directed activities include do-it-yourself stations, 1,000 books before kindergarten reading challenge, and a frequent reader club. Now again, you would count all self-directed activities whether held on or off-site, as long as they're sponsored or co-sponsored by the library. When you're counting the participation count for self-directed activities, just like with programs, first consider the primary audience: is this for children? is this intended for young adults? or is this other all ages? Regardless of who participates, count whoever participates in the activity in that age group. Lastly, I just want to highlight some key differences between programs and self-directed activities. The main difference between a self-directed activity and a program, is a self-directed activity is dependent upon the participant to create the experience on their own time.

A program is dependent on the library staff to create the experience for the group attending, at a set date and time. Now I want to talk about methods of counting. The annual report specifies what qualifies as a program or a self-directed activity, but is up to the individual library to

determine clear and consistent ways to record this data. So some common ways of coaching program attendance include headcount, sign-in sheet registration and door clicker count. There are many others, those are just a few. Similarly, some common ways of counting self-directed activity participation include registration, a tally sheet, counting the materials used or the items produced. So those are some of the key factors for the overview of the annual report and some of the main definitions. We're now going to walk through the new tracking sheet to see if that how that puts it all together.

10:33:
Tessa: So we're now going to switch over to an Excel workbook that has been designed to help libraries keep track of data all year long but especially during annual report time. This work is available on the DPI website for you to download, use and customize for your library's needs. The workbook is designed to track library events like programs and self-directed activities. It is not a workbook for tracking all of the data elements in the annual report. Let me start with a basic tour of the workbook. There are several sheets or tabs within the workbook and they're down here at the bottom. The first tab or sheet is definitions. Definitions of programs and self-directed activities are shown here, including the ages and some examples of ways to count, so that's what you can find here, just as full text version while you're using this tracking document. The next tab or sheet is Excel tips. This is pretty basic, but we wanted to include some simple instructions for how to insert new rows or how to insert new columns, so you can find that here under Excel tips. The next sheet is the Event Tracker. This is a blank, pre-formulated worksheet for you to use, ideally at the start of the calendar year.

The event tracker itemizes single events like programs or self-directed activities. The next sheet, the Annual Report Summary, is also a blank, pre-formulated worksheet that will autofill as you complete the previous tab, the Event Tracker. The Annual Report Summary essentially shows you what you need to enter into the public library annual report just like it looks in LibPAS. The next sheet, the Event Tracker Example, I'm going to walk through this one in detail as well as demonstrate how to add new events. First, let's look at this big row at the top. These are the main components for any event that you'll enter. The first few are pretty basic: Date, Time, Duration, and the name of the local event. The next section in blue is going to test your knowledge of the annual report definitions. If you need help with the definitions, remember that the full text is listed here under the Definitions tab.

13:12:
Tessa: The Target Audience column tab is a drop-down which you can see with this little arrow here, and this is auto-filled so that you are only allowed to select the different age groups that we also identified in the definitions. So, from the beginning, when you are listing Event, you're going to need to identify who the target audience or the primary audience for that event is. The next column, Column F, is group attending program or individual participants self-directed activity. You're going to need to know if the event was planned for a group attending at a set date and time, or if this is a kind of event that is much more up to the individual participants to

determine how to participate on their own time. Depending on what you choose for Column F, if it's a group attending or individual participants, you will have the option of entering the total amount of people who took part in that event. If it's for a program, you'll enter that in Column G, the total number of attendees. If it was a self-directed activity with individual participants, you would enter the total number of participants in Column H. So to review, these four columns, EFG and H are all in blue because these are the data points that matter for the purposes of the annual report. The other columns are important but they matter more to your local institution than they do for state and federal reporting. So let's use this scroll bar here and move over to look at the remaining columns. These columns represent some of the most commonly asked questions that we get at the state, and certainly that you might be asking your system for help on, in regard to programs and self-directed activities so, Column I, Method of Counting, is not required, but it's something that you might find helpful to keep track of, so that you and your library staff can be consistent about the methods you're using to collect data.

15:20
Tessa: The next column, J, on or off- site, is also not required but it's beneficial for tracking outreach efforts. Remember, that library programs and self-directed activities can happen at the library or off-site, as long as they are sponsored or co-sponsored by the library. The next column is a place to record the staff involved in each event. Again, this might but not be relevant especially if you're a library with few staff, but it might be helpful when you need to go back and figure out the details for a certain event, especially that happened a long time ago, or you just want to keep track of how much staff it takes to do programming self-directed activities. Again, this column is not required. The next column called Local Collaboration is a place to note partnership, sponsors or off-site locations. This is a great detail when you want to keep track of the different collaborations that you're doing for reporting again to your library board or just for your own use.

The Notes column is a bit of a catch-all, and it's useful for event- specific details. The last column is Add Your Own Custom Local Element. For example, maybe you want to keep track of the meeting space or the meeting room where events are held, it's up to you. None of these columns are required, they're just some details that might help you with your data collection and reporting. Now that we can see these main categories across the top, let's walk through some of these examples. The first one here and is it is an event from last January, a movie night held at the library, so after these basic details, the date, the time, the duration, of the name of the local event, we get to the critical details for the annual report. This is showing that Arctic Dogs, the movie viewing was a PG animated film, and the target audience for this library program was children. That drop-down is pretty easy, so entering this in, you would choose children ages 0 through 11. That's right in, so you don't have to type that. As soon as you put your cursor in the box that's one of the choices to enter, so keep in mind again, if teens or grown-ups attended or anyone else, they all get counted as children, since that's the intended audience. Now for the next question: Group Attending or Individual Participation. This event of movie viewing Arctic Dogs is definitely for a group attending. The movie is shown at a set date and time, for whoever is in the room. In this case, there are 17 attendees. Now, if we keep scrolling on this tracker, we

can see it that the method of counting for this event was kept track of using a door clicker, and Kendra was the staff who was involved for this event. The next event is also fairly straightforward. Let's assume that Baby Books and Play is a story time, and that also means that it happened at a set date and time. This is also a Group Attending, and that means that it's a program. Nine people attended, according to the head count that was done by Carlos. We can see from the note on the far side here that there was snowy weather, which is helpful for understanding my numbers were likely lower than average for that event. The next event is the Global Perspectives Lecture Series. Now keep in mind that if events are part of a series, you need to enter each one as a single event. For this event, we can see that the target audience is Other (all ages). We can assume that this lecture series is probably planned for adults, which is why the other all-ages category is selected. We can also see for this event that there were two collaborators noted, which is helpful for tracking Library Partnerships.

19:33

Tessa: The next event is the Teen Escape Room. This event was also held on a set date and time and for a young adult audience. Again, keep in mind that if a few 11 year olds showed up for this event they still get counted as young adults because that is the target audience. Two things to note about this event. First, attendance was counted via a registration form. Second, it was held off site at the youth center and received a lot of donations from the community to make it happen. The examples so far have been pretty straightforward programs for Group Attending at a set date and time. The next few examples differ. You can tell right away when you are looking at the time and the duration. The time is n/a, or not applicable which indicates that these events did not happen at a set date and time, rather they took place over the course of the month of February. This one, Tell Us What Book You Love, was planned for individual participation and for individuals of all ages. The number of participants was 54, which was counted by the number of artifacts completed. Now, this sounds like a typical do-it-yourself station, or passive program, where participants can make something at the library using the supplies set out, or even made it home and brought back to the library when complete. In this case it was an activity in which participants made something that showed a book that they love. We can imagine that these artifacts were displayed at the library to inspire other readers. The other two events that happened in February are also self-directed activities; one was directed at children and the other for young adults. Participation in the Cabin Fever Reading Program was counted by completion of reading logs. Reading logs usually indicate that participation is dependent on the individual.

In this case, kids and teens could do reading activities at home or at the library and at their own pace, key indicators of a self-directed activity. Now the Sci-Fi book club is an event that's listed four times. We can guess if this is a regular program or part of a series or an ongoing book discussion. But keep in mind, every program needs to be entered as a single event. It looks like the Sci-Fi book club once a month for 4 months in a row, and they used a sign-in sheet to count attendance.

Tessa: The next three events are also similar but each entered as single events. Many public libraries offer presentations around the community in the month of May, to promote summer learning events. Here we can see that three different schools were visited at specific dates and times. So these are off-site programs. The final two examples are events that were recorded at the end of the year because they are ongoing reading challenges. The first one is 1,000 Books Before Kindergarten reading challenge. For most participants, completing this reading challenge extends over a few years; however, the annual report needs an annual count. Therefore, it is recommended that libraries count only new registrants in a given calendar year, not graduates or ongoing participants. See the note that is in Column M indicating this for library staff year, not graduates or ongoing participants. See the note that is in Column M indicating this for library staff who are entering this in. For this 1,000 Books Before Kindergarten reading challenge, there were nine new registrants over the course of the year. Similarly the Modern Classics reading challenge is an ongoing self-directed activity targeting adults or other all ages. During all of 2019 there were four new registrants in this self- directed activity.

Now I'm going to demonstrate how to add new events. For the first example, let's say you forgot to enter the June meeting of the Sci-Fi Book Club. I can look at insert new row tips on the Excel Tip Sheet if I forgot how to do this. So I know that I'm just going to insert a new row and enter in the details for that June meeting. And I can fill in the other details as needed, but that's how you add a new row for a new single event. I want to point out a critical feature of this tracker when it comes to the data that it pulls for the annual report. When I put in the June entry for the Sci-Fi book club meeting, I entered in the group attending as 12 attendees for that event. Let's see what happens if I accidentally put this in the other column the number of individual participants. If I put in 12 as my number of participants I'm going to get this error message and if you actually read the error message it's telling you exactly what's wrong here that you entered in attendance for individual participants but selected group attending. It's a mismatch so you can cancel this, and you're also going to see this here, because if you choose group attending you can only enter group attendance. Conversely, if you choose that something has self-directed activity or individual participation, you can only enter the number of individual participants in this column. They're connected that way. That's why for all of these that are blank it's because there's numbers entered here. For all of these that are filled, there are blanks here, and you can see that little green indication there that it's intentionally blank or it needs to remain blank because they're contingent on whether it's for a group like a program or if it's an account for an individual participation. For the next example, let's say we forgot to enter a library event from last summer when the library had a booth at the county fair. So I want to put that in for a new event.

So enter that in and then I get over to these critical questions again up here in blue. So I know that the target audience was other for all ages because we were meeting and greeting everybody who stopped by the booth that day and this was a time when we were passing out library card applications and just representing the library and showcasing some of our materials. I know that the booth was at a set date and time, but when I get to this part here was it for a group attending or self-directed it's a little fuzzy. The truth is this kind of example is neither

group attending or individual participants. This kind of event is a one-to-one event, meaning that library staff are available and interacting with individuals. Keep in mind that many libraries offer services like this. They are amazing and should be communicated to your library board into your community; they are just not reportable on the annual report. For this example, here's how I would enter it. I'm going to leave these sections blank and instead I'm going to insert a new column that record the information that I want to keep track for our local library. So I'm just going to make a note that we are keeping track of our one-to-one event and the number of interactions that we have, in this new column so at the county fair we had a lot of individual interactions in fact we had 57 different contacts at that event, so I have an account and I can also say the way that we kept track of that was using a tally. So there is a great way to show that you are having that kind of service to your community but it's just a different kind of service and this way it's a one-to-one and you have your own method of counting it.

28:03:

Tessa: So now you can see, I've added in all of the details for our June participation and the county fair with the library Booth with the details about how many of interactions we had, who was there, and any other important notes for our event at the County Fair. One thing you might want to know about the tracker is that you can do some simple sorting, so for the event that we just added this June event, it got entered below the December events and you can simply resort these to put things in chronological order by going up to the Sorting feature for each column. In this case to sort by date I can click on this sorting and change it to sort from oldest to newest so right by doing that it pops in our June event right beneath the May events in chronological order. Now let's say you want us to sort Column F to bunch together the programs and self-directed activities just in case you wanted to have an at-a-glance, or look at what you offered for these different ones. So again, you can go up to the drop down here and sort. And what it will lump alphabetically all of the group attending and the individual participants self-directed activities. You can also highlight these, for example if I select all of the group attending and I can see them here that the count is 12. Imagine if you have many things listed here, you're not going to want to count these with your finger, row by row. If you simply just highlight it will show you the count so you can see that so far in this tracker there have been 12 events reported, in particular 12 programs or events for group attending. Similarly, if I highlight the number of attendees over in this column I can see again that there are account of 12 different totals entered but the sum of all of those program attendees is 246, so again there's some features built into Excel as many as well as many more that let you do things with this.

These are just some quick at a glance ways that let you see some of the important details about the services your library is offering in regard to programs and self-directed activities. Lastly, I want to show you the annual report summary example tab, which is hiding over here, but we can see that, and again this is AutoFill. Pulling from the information that is if that is entered in the event tracker example. This is where it's breaking down the number of programs, the attendance by age group, and the self-directed activities and the participation counts according to the categories needed for the public library annual report, so the more you play with this event tracker example you can see how they will change over here similarly the blank ones that

you have for your own use work exactly the same way. So again this tracking tool was developed for your use. It's available on the DPI website under Public Library Annual Report, and you can use it and customize it for your library's needs. Again, it's not for tracking everything just programs and self-directed activities or similar events that you are going to label and customize for your library. Keep in mind that almost everyone will have events that don't fit the federal or state definition of programs and self-directed activities. It's important that you don't try to push a round peg in a square hole by calling

something a program when it really isn't. It decreases the quality of data at your library, at the state level, and nationally; that's why we made this tracker customizable so you can keep track and report locally on the things that are unique and important to your community. Thank you for your time and attention. I hope you find this video to be helpful for understanding the big picture, key definitions, and the singular event details. Happy tracking and happy reporting.