




January 27, 2021
Virtual Meeting



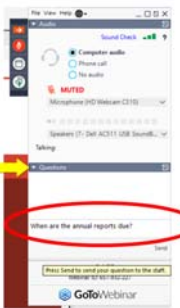
2020 Annual Report

For New York State Public Libraries


Getting Started

- Why do we do Annual Reports?
- Don't delay: deadline for Submission to the System is **Monday, March 1**
- You will not receive your first Materials Grant Plan payment until it is received
- Login at <https://collectconnect.baker-taylor.com/login.aspx>
- Compatible with major browsers Ask Jan if you don't know your login info
- Handouts: cclsny.org – For Librarians – Annual Report
- Format of this presentation...
- **Ask Questions & Ask to be Unmuted**  as we go...

Ask a Question: Attendees do not have a chat option in GoToWebinar; you post comments and questions to the Organizer (system staff) through the *Questions pane* in your Control Panel.



How to talk to all during webinar:
You are muted. To talk, click on the *Raise hand* icon and ask to be unmuted.



Your Annual Report Consultants:

Please contact the following "experts" if you have questions:

Jan Dekoff jdekoff@cclsny.org
General Questions & Technical Glitches, Central Libraries
General Info, Staff, Minimum Standards, Trustees (Sections 1, 6, 7
& 10)

LJ Martin ljmartin@cclsny.org
Programs, Policies, & Public Service, Public Service and Service
Outlet Information (Sections 3, 8 & 9)

Kathy Gustafson kgustafson@cclsny.org
Financials (Sections 11, 12, 13, 14, 15)

Megan Disbro mdisbro@cclsny.org
Collections, Transactions, Tech, and Telecoms (Sections 2, 4, 5)

Carolyn Hughesman chughesman@cclsny.org
Koha Reports

Your Annual Report

Submitting your report

- After submitting, email Megan: mdisbro@cclsny.org
- If you are not able to submit because Parts 2 & 4 have not been completed by the system, please contact Megan
- Consultants will review their parts and let you know if there are questions. Please respond in a timely manner.
- Jan will let you know when all is satisfied

Summary of Changes

- **One Person, One Report:**
 - Only one person at a time should be logged into a member library report.
 - Have a print or PDF copy of your 2019 Annual Report. Don't have two reports open at once!
- **Section 3: Library Visits – counted or estimated**
- **Section 4: Reference Transactions – counted or estimated**
- **Section 8A: COVID Questions **NEW****
- **Section 10: Trustee Education – use trustees as of 12/31/2020**

Important Reminders

- Give us an explanation in a note if a difference of +/- 20% from last year
- Keep a copy for your records. Print it or save it as a PDF. You will want it handy next year.

SHOW LAST YEAR'S ANSWERS

- GENERAL LIBRARY INFORMATION
- LIBRARY COLLECTION
- LIBRARY PROGRAMS, POLICIES, AND SERVICE
- LIBRARY TRANSACTIONS
- TECHNOLOGY AND TELECOMMUNICATIONS
- STAFF INFORMATION
- MINIMUM PUBLIC LIBRARY STANDARDS
- PUBLIC SERVICE INFORMATION
- SERVICE OUTLET INFORMATION
- OFFICERS AND TRUSTEES
- OPERATING FUNDS RECEIPTS
- OPERATING FUND DISBURSEMENTS
- CAPITAL FUND RECEIPTS
- CAPITAL FUND DISBURSEMENTS
- CENTRAL LIBRARIES
- FEDERAL TOTALS

LIBRARY USE

3.1 Library visits (total annual attendance)

Library Visits

- If actual counts are available, please report them. Otherwise, provide an estimate (typically based on a count taken during a "typical week". If you have a "typical week" count, multiply the count by 52 weeks to report the annual count.
- A "typical week" is a week in which the library is open its regular hours, is neither unusually busy nor unusually busy and containing no holidays/observance events. It is seven consecutive calendar days, from Sunday through Saturday, or whatever days the library is open during that period. Please report all figures for the same week, if possible. It is recommended that libraries take a count during a

Financial Sections 11-14

- This report is Cash basis— only report money actually received and paid in 2020.
- Round to the nearest whole dollar, no cents.
- Your Operating Fund Balance at the beginning of 2020 must match what you reported at the end of 2019.**

- Please include Notes where requested. Notes = List of \$\$ amounts **AND** description. Look in Presentation for

11—Operating Fund Receipts

K

▪ **11.1 Local Public Funds:** Report all money received from towns, villages, cities, school districts. Remember a public vote does not mean the vote of a town, village, school, city board; rather it means individual residents who voted on a funding proposition placed before them at an election.



▪ **11.3-11.7 System Cash Grants To Member Library:** CCLS provides these figures in a Memo. Do not add anything to these figures.



▪ **11.9 Other State Aid:** Report here any legislative member items, Bullet Aid, Arts Decentralization grants, Construction grants (if you do not have a separate capital fund) or any other state aid you received directly (not through CCLS).

N

11—Operating Fund Receipts

K

NEW FOR 2020

▪ **11.11 Other Federal Aid:** Per NYS DLD – “PPP loans, Employee Retention tax credits and Federal COVID sick leave payments should be reported under Q11.11.”

▪ “Please add a note saying what they are.”

N

11. OPERATING FUNDS RECEIPTS : Federal Aid

FEDERAL AID FOR LIBRARY OPERATION

11.10 LSTA

\$0

11.11 Other Federal Aid

\$0

11.12 TOTAL FEDERAL AID (Add Questions 11.10 and 11.11)

\$0

11—Operating Fund Receipts

K

▪ **11.14 Gifts and Endowments:** Money received from private individuals, foundation grants, or Friends' groups.

N

▪ **11.15 Fund Raising:** Money from special fundraising activities or events, but **NOT receipts from booksales**.

N

▪ **11.16 Income from Investments:** Interest on bank accounts, earnings on investments and endowments deposited into the operating fund.

▪ **11.17 Library Charges:** Copy machine receipts, fine money, hold/reserve fees, printer and fax fees.

N

11—Operating Fund Receipts



- **11.18 Other Receipts:** Any receipts that do not fit into any other category. **Booksale receipts go here.**
- **11.22-11.23 Transfers:** If you transferred any money from a capital fund or a memorial fund into your operating fund, report the amounts here.
- **11.25** - The ending balance of funds as reported on Line 12.40 on the 2019 report!

12—Operating Fund Disbursements



- **12.1 - 12.2 Salaries & Wages Paid from Library Funds:** Report gross wages here - wages before any deductions have been made. Do not include independent contractors. Report only wages for employees included in Part 6.
- **12.4 Employee Benefits Expenditures:** Report only the Library's share of Social Security and Medicare taxes (FICA), Disability Insurance, Workers' Compensation, Unemployment Insurance, Retirement benefits, Health Insurance benefits. **DO NOT INCLUDE** employees' share of their individual withholdings.

12—Operating Fund Disbursements



- **12.6 – 12.9** Collection expenditures. Refer to definitions for these categories as found in Part 2 of Annual Report instructions.
- **12.10-12.11 Capital Expenditures from Operating Funds*:** Expenditures for vehicles, buildings, building additions and new items for the building. For example, a new roof, a new furnace, furniture.
- **12.13-12.14 Repairs to Building & Building Equipment*:** A repair includes things like fixing a leaking roof, repairing a furnace, plumbing repairs, etc.

***IMPORTANT:** Report expenditures in both these categories on Lines 12.11 and 12.14. (Unless your local public funding body (as reported in Line 11.1) ordered you to spend the money it gives you on a capital item or a repair.)

12—Operating Fund Disbursements

K



▪ **12.16 Other Disbursements for Operation & Maintenance of Buildings:** Utilities, property insurance, custodial and cleaning supplies, contracts with cleaning people, snow removal, lawn mowing, etc. If your library does not pay utilities, please indicate so in a Note.

N

▪ **12.18 Office and Library Supplies:** Report paper, library cards, book pockets and jackets, computer/printer paper, copier paper, stationery, pens, pencils, paper clips, tape, photocopier supplies, and bank checks costs here.

▪ **12.19 Telecommunications:** Report telephone costs and Broadband/Internet costs here.

12—Operating Fund Disbursements

K

▪ **12.20 Binding Expense**

▪ **12.21 Postage and Freight** – Stamps, UPS, FedEx



▪ **12.22 Professional and Consultant Fees:** Auditors, Attorneys, Educators, Program Presenters, Performers and other consultants. If any consultant fee is more than \$10,000, describe in a Note.

N



▪ **12.23 Equipment:** Record costs of such items as photocopiers, fax machines, computers, printers, scanners, rentals/leases of equipment and office equipment repairs, maintenance contracts, etc. If any expense exceeds \$10,000 or 5% of the library's budget, whichever is higher, indicate in a Note how the funds were spent.

N

12—Operating Fund Disbursements

K



▪ **12.24 Other Miscellaneous:** Report any other costs which do not fit into the above categories. For example: program supplies such as craft items, membership dues, volunteer recognition costs, food, lost materials and bank fees. If any expense exceeds \$10,000 or 5% of the library's budget, whichever is higher, indicate in a Note how the funds were spent.

N

▪ **12.27-12.32 Debt Service:** Refer to State Instructions for Details

▪ **12.34-12.37 Transfers:** If you transfer money from the Operating fund to the Capital fund or other fund.

12—Operating Fund Disbursements

K

▪ **Line 12.41 Must Equal Line 11.26:**

Beginning Operating Fund Balance + Receipts + Transfers In =
Ending Operating Fund Balance + Disbursements + Transfers Out.

If you start 2020 with \$10,000 + receive \$100,000 in cash, you had \$110,000 in 2020.

If you end 2020 with \$20,000 you MUST have spent a total of \$90,000 in 2020.

If not....there's a mistake somewhere!

13—Capital Fund Receipts

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▪ **13.2 All Other Revenues** Put Grants from Foundations here N

▪ **13.4 State Aid Received for Construction**

▪ **13.8 Transfers from Operating Fund** Funds deposited in your Operating Fund account and then transferred to Capital Fund (same as line 12.36)

▪ **13.12-** The ending balance of funds as reported on Line 14.11 on the 2019 report!

14—Capital Fund Disbursements

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▪ **14.1 Construction:** Payments to contractors for construction costs. N

▪ **14.2 Incidental Construction:** Architect fees, site acquisition, furniture and other equipment, legal services, surveyors, etc. N

▪ **14.3 – 14.6 Other Disbursements:** Refer to State Instructions for Details

▪ **Line 13.13 must equal Line 14.12.**

1- General Library Information



- **1.23 Library Home Page URL** – copy from the address bar when on the webpage – enter the same URL in Section 9, Q10.
- **1.37-1.44** Enter for *CURRENT* library director
- **1.40-41 Educational level of the library director**
If you mark Other, please explain in a Note.
- **1.42 Active Public Librarian's Certificate for staff in budgeted librarian positions (6.4)?** If NO for any staff in a *budgeted librarian position*, enter name & email in a Note.

1- General Library Information



- **1.46 Does the Library charge fees for library cards to people residing outside the system's service area?**
Answer YES if you charge a fee to an individual who resides OUTSIDE of Chautauqua or Cattaraugus Counties.
- **1.47 All or part of funding subject to Public Vote in 2019?** Provide details about a public vote held in 2019 – use repeating groups for additional votes. Compare to what is entered in 11.1. If NO, skip to 1.48.
 - 6a previous amount
 - 6b amount of increase requested
 - 6c total new amount (6a + 6b)

1- General Library Information



- **1.48 Funding approved by a public vote in a previous year?** Provide details about a public vote held in a previous year that is *still in effect*. Use repeating groups for votes from different entities. Compare to what is entered in 11.1.
- **1.49 Contract to serve areas not chartered under a library?** A written contract to serve for a fee areas that are outside your chartered area of service and that are not chartered by any library.
- **1.50 Unusual Circumstances** Everyone will note COVID-19.

2- Library Collections

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- **Total Holdings as of December 31, 2020**

- **The system will input figures from KOHA Reports**

Please note...

- Line 2.8 Total Uncataloged Books
- Line 2.9 Total Print Serials (*vols. not issues*)
- Line 2.14 Local Electronic Collections (your library databases) 3+ (*Ancestry Library Edition, Rosetta Stone, JobNow + library's – ABC MOUSE?*)
- Line 2.23 Other Non-Electronic Materials (films, slides, CD-ROMs for patrons...)
- **Removed: Line 2.26 Current Print Serial Subscriptions**

Include notes if you make any changes!!

3- Programs, Policies, & Services

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- **3.1 Library Visits** If you don't keep a daily tally, count an average week and multiply by 52, or how many weeks open.
Add a Note if you borrowed the System's counter.
- **3.2 Registered resident borrowers** The number of your cardholders who live within your Chartered to Serve Area.

3- Programs, Policies, & Services

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- **3.3 Registered non-resident borrowers** The number of your cardholders who live outside your Chartered to Serve Area. Include patrons for contracted areas here.

*Carolyn will send a Koha report of your borrowers. Subtract resident borrowers from total to get non-resident borrowers.
- **3.4-3.10 & 3.16 Board Approved Policies** Answer all **YES**. If there are any of these policies you do not have, contact Jan.

3- Programs, Policies, & Services



- A program is an event held at the library or another location in which the library is the primary contributor of time, money, or people in the planning or presentation.
- Each session is an individual program.
- Do not count programs with zero attendance.
- Do not count staff or volunteers presenting or assisting with the program as attendees.
- **One-on-one sessions are *scheduled sessions*.** They may be appointments for individuals or scheduled walk-in times. Each person assisted in a scheduled walk-in time counts as a one-on-one session.

3- Programs, Policies, & Services



- Children are defined as people who are 11 years of age and under.
Young Adults are defined as ages 12 through 18.
- Count a program under the *intended primary audience*, Adults, Young Adults, or Children, for programs where multiple ages are in attendance.
- No clear *intended primary audience* or *family programs*? Enter under **3.20 All Other Program Sessions**
- Count everyone, regardless of age, in the *intended primary audience* attendance figures.

3-Programs, Policies, & Services

New for 2020



- Live virtual programming is a program
 - Doesn't matter the platform - live = program (FB, YouTube, GoToMeeting)
- Have to count in target audience report (youth, children, Adult)
- Count unique views from FB- at least viewing for 1 min
 - If stats where kept- SPR, Early Lit, Adult Lit, ESOL, Digital Lit- if not that's ok for this year
- Count those who watched the program live only
- Recording and viewed later - count as a recording in Section 8
 - Just watching no way for interaction- after the fact
 - Take and Make kits are not counted as a program

A live program can be counted as a program and recording if left up on to view later

3- Programs, Policies, & Services



- **3.17-3.29 Total Programs and Attendance** for 2020.
Enter the *total* number of programs and the *total* attendance for each age group for the year. Include a program only once in these totals.
- The following sections are a breakdown of these total numbers into specific categories.
- Some programs can be included in multiple sections.
- Try the adapted Excel sheet in 2021 for easy calculation

3- Programs, Policies, & Services



- **3.20 All Other Program Sessions** Events that have no clearly identifiable *intended primary audience*.
- **3.22 & 3.29** One-on-one sessions are scheduled events.
- **Reminder** - If 2 people come for a one-on-one scheduled session, count it as 1 session and 2 in attendance.
- Walk-ins are counted as a reference question in Part 4.
- **3.22 Group Presentations/Information Tables**
Yes – only if staff, trustees, or volunteers are present providing information about the library.

3- Programs, Policies, & Services



- **3.30-3.43 Summer Reading** Information provided should match Summer Reading reports submitted in September.
- **3.44-3.51 Collaborators**
A collaborator must actively participate; they must provide assistance or service for a specific program. Transporting children to the program or providing space for a program qualifies as a collaborator.
Donors of money or goods and schools notifying children about the program do not count as collaborators.

3- Programs, Policies, & Services

v

- **3.52-3.58 Early Literacy** Programs for children, birth to entering kindergarten – preschool, toddlers, babies.
 - **a.** Focus on birth-school entry – for children *only*
 - **b.** Focus on parents & caregivers – for adults *only*
 - **c.** Combined audience – a preschool program that is an enriched storytime, providing early literacy tips for parents/caregivers OR a parent training that is planned to include children.
- A collaborator must actively participate; they must provide assistance or service for a specific program.

3- Programs, Policies, & Services

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- **3.59-3.64 Adult Literacy** These programs are specifically for *adults with low literacy skills*. Do not count programs for general adults here.
- **3.65-3.76 ESOL** These programs are for those whose first language is not English.
- **3.77-3.81 Digital Literacy** Programs include classes that teach basic or advanced computer or digital skills: email, e-readers, Quickbooks, online job searches and applications, etc.
- **Reminder – 3.82-3.83** Did the library offer any teen-led activities, planned and facilitated by teens, in 2020 or 2019? Notice that 2 years are asked for.

4—Library Transactions

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Report all transactions as of the end of December 31, 2020

- **The system will input CIRC figures from KOHA reports**
- **Lines 4.20 & 4.21 ILL – Materials Borrowed & Provided**
- **4.12 Use of Electronic Materials** (CIRC requires authentication & lending period – All OverDrive CIRC)
- **4.13 Successful Retrieval of Electronic Information** (authentication required but no lending period; # of records supplied/viewed; count: Ancestry Library Edition, Rosetta Stone, JobNow, NOVELny, & your local databases)
- **4.18 Total Reference Transactions:** What counts as a Reference Transaction? **New Question: 4.18A** Is this an annual count or estimate?
- **4.19 Does the library offer virtual reference?** All Members say YES because of email & chat reference service

5—Technology & Telecom.

Report all information as of December 31, 2020

M

- 5.4 Annual number of visits to the library's web site?
Only count internal & external hits to your library's website.
Do not include social media usage in this line.
- 5.5 Does the library use Internet filtering software on any computer? If you receive eRate, say YES
- Line 5.6 Does your library use social media?
- Line 5.7 Does the library file for E-rate benefits?
- Line 5.8 Is the library part of a consortium for E-rate benefits?
- Line 5.9 If yes, in which consortium are you participating?
- Lines 5.10 – 5.12: If your library does not have its own IT contact, it's OK to list Mike Jones or Director

6—Staff Information

J

- 6.1: Use the weekly hours of the employee who works the most weekly hours each week to calculate FTE's (usually the director/manager)
- Note: Include FTE's for all positions funded in the library's budget whether those positions are filled or not.
- Note: Report salaries as of December 31, 2020. This is NOT year-to-date paid out, but the contractual annual salary (for hourly employees multiply hourly rate x average weekly hours x 52)
- Note: Include only employees whose wages are reported on Line 12.3.

7—Minimum Standards Updates

J

- **NEW** *As of **January 1, 2021**, all public, free association and Indian libraries in New York State will be required to meet the revised minimum standards
- EVERY member library should be able to answer each question with a YES. If not, contact Jan!
- 1. is governed by **written bylaws** which define the structure and governing functions of the library board of trustees, and which shall be **reviewed and re-approved by the board of trustees at least once every five years** or earlier if required by law
- 2. has a **community-based**, board-approved, **written long-range plan of service** developed by the library board of trustees and staff

7—Minimum Standards Updates



- 3. provides a board-approved written annual report to the community on the library's progress in meeting its mission, goals and objectives, as outlined in the library's long-range plan of service;
- 4. has board-approved written policies for the operation of the library, which shall be reviewed and updated at least once every five years or earlier if required by law;
- 5. annually prepares and publishes a board approved, written budget, which enables the library to address the community's needs, as outlined in the library's long-range plan of service;

7—Minimum Standards Updates



- 6. periodically evaluates the effectiveness of the library's programs, services and collections to address community needs, as outlined in the library's long-range plan of service;
- 7. is open the following scheduled hours **NO CHANGE**
- 8. maintains a facility that addresses community needs, as outlined in the library's long-range plan of service, including adequate space, lighting, shelving, seating, power and data infrastructure, and a public restroom;

7—Minimum Standards Updates



- **NEW** 9. provides programming to address community needs, as outlined in the library's long-range plan of service;
- 10. provides a circulation system that facilitates access to the local library collection and other library catalogs; and provides equipment, technology, and internet connectivity to address community needs and facilitate access to information;
- 11. provides access to current library information in print and online, facilitating the understanding of library services, operations and governance; information provided online shall include the standards referenced in paragraphs (1) through (5) of this subdivision;

7—Minimum Standards Updates



- 12. employs a paid director in accordance with the provisions of section 90.8 of this Part; (see below) **NO CHANGE**
- **NEW**13. provides library staff with annual technology training, appropriate to their position, to address community needs, as outlined in the library's long-range plan of service;
- **NEW**14. establishes and maintains partnerships with other educational, cultural or community organizations which enable the library to address the community's needs, as outlined in the library's long-range plan of service.

8—Public Service Information



- **8.4 Other Outlets** Count Deposit Collections that you provide to nursing homes, senior centers, daycare centers, schools, etc. on this line.
- **8.6 Minimum Weekly Hours** Enter hours from your shortest scheduled week (not a holiday week). This number must meet the minimum hours listed in the Public Library Standards chart (see Part 7 of Inst.)
- **8.13 Annual Total Hours** Enter this number on line **9.15**, also, unless you have branch hours. **ADD NOTE: COVID CLOSURES**

8—Public Service Information



New Questions for 2020 dealing with COVID-19

- Were any of the library's outlets physically closed to the public for any period of time due to COVID-19? - **YES**
- Did library staff continue to provide services to the public during any portion of the period when the building was physically closed to the public due to COVID-19? - **YES**
- Did the library add or increase access to electronic collection material due to COVID-19? - **YES**
- Did the library allow users to complete registration for library cards online without having to come to the library before COVID-19? - Answer for your library

8—Public Service Information



New Questions for 2020 dealing with COVID-19 Con't

- Did the library allow users to complete registration for library cards online without having to come to the library during COVID-19? - **YES**
- Did the library provide reference service via the internet or telephone with the building was physically closed during COVID-19? - **YES**
- Did the library provide "outside" service for circulation of physical materials at one or more outlets during COVID-19? **YES**
- Did the library provide live, virtual programs via the Internet during COVID-19? Answer for your library

8—Public Service Information



New Questions for 2020 dealing with COVID-19 Con't

- Did the library create and provide recordings of program content via the Internet during COVID-19? Answer for your library
- Report total number of recordings of programming content during COVID-19 - Optional answer. #
 - Recording can be posts kept up from live recordings
- Did the library provide Wi-Fi Internet access to users outside the building at one or more outlets before COVID-19? - **YES**
- Did the library intentionally provide Wi-Fi access to users outside the building during COVID-19? - **YES**

8—Public Service Information



New Questions for 2020 dealing with COVID-19 Con't

- Did the library increase access to Wi-Fi access to users outside the building during COVID-19? Answer to your library
 - Took off or posted Wi-Fi password
- Did the library staff work for other government agencies or nonprofits organizations instead of, or in addition to, their normal duties during COVID-19? **NO**
 - If you or a staff may have, contact Jan.
- Enter the Number of Weeks and outlet closed due to COVID-19. An outlet was physically closed and the public could not enter, when it would have otherwise been opened. #
 - If only doing curbside- physically closed

8—Public Service Information



New Questions for 2020 dealing with COVID-19 Con't

- Enter the Number of Weeks and outlet had Limited Occupancy due to COVID-19. #
 - Week patrons could start coming in – Dec. 31

Re-cap

- Closed= patrons could not enter the building and use materials
- Curbside service only= library still closed
- Limited Occupancy= only certain #of people

9—Service Outlet Info



- **9 Q26 Total number of Internet terminals used by the public** If your have a different number of computers from last year, explain in a Note.
- **9 Q27 Number of public computer uses**
If you do not have a sign-in process, take a tally in an average week and multiply by 52.
- **9 Q29-30 Upload/download speed**
Test both speeds each year. www.speedtest.net

9—Service Outlet Info



- **9 Q32 Wifi Access** Are passwords or a library card required? Is the wifi turned off when the library is closed? Use Other and add a **Note** if you have more than one. **ADD NOTE** if changed for COVID-19
- **9 Q33 Number of Wireless Sessions** Each wireless connection is one session no matter how long they are connected. Count sessions from outside the library and when the library is closed. If the System has access to your Google Analytics data, we will provide this number. Please contact Carolyn if you need help accessing Analytics.

9—Service Outlet Info



- **9 Q34 Interactive Videoconferencing Capability for Patrons - Deleted**
- **9 Q35-36 Accessibility** Are your entry and all parts of your outlet accessible to persons in wheelchairs? Basic requirements include a *minimum of 36"* between book stacks and around tables and chairs. <https://www.access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-ada-standards/background/adaag#lib>

10—Trustees and Officers



10.2 Does your library have a range of trustee seats in the library's charter documents (incorporation)?
 Yes

10.3 If yes, what is the range?
5-10

10.4 If your library has a range, how many voting positions are stated in the library's current bylaws?
3

10.6 Does your library's charter documents (incorporation) state a specified term for trustees? If no, please explain in a note.
 Yes

10.7 If yes, what is the trustee term length, as stated in your library's charter documents (incorporation)?
3

Library bylaws should have the number of voting positions stated. DLD has been asking to have libraries amend their bylaws to include number of voting positions

If your charter does not include term lengths, your bylaws should.

10—Trustees and Officers



- Reminder: **Use Feb 1, 2021** information to complete this section, not 2020.
- The number of trustee records must match the number or range reported in Line **10.3/10.4**
- Complete one record for each trustee seat
- If you have any empty seats, you need to create a vacant record for each one.
- For each Trustee:
 - Report house numbers (no one in New York State lives in a house without a number).
 - Except in the case of board officers, the answer to Line 8 (Office Held) is "trustee".
 - Provide e-mail addresses for all of your trustees
 - **Tip!** **SAVE** after entering each trustee*

10-Trustees and Officers

- Term Length Errors are common
 - Refer back to your 2019 report and copy information that has not changed
 - Use the trustee term calculator (On CCLS Annual Report webpage)
 - Enter the term start date and the number of months in their term
 - The calculator fills in the end date for you

Trustee Name	Start Date	Months	End Date
John	1/1/2021	14	12/31/2022
Rose	1/1/2020	36	12/31/2022
George	1/1/2019	36	12/31/2021
Ken	1/1/2021	36	12/31/2023

- Example of 5 year terms:
 - January 2016 to December 2020 ✓
 - January 2016 to January 2021 ✓
 - January 2016 to December 2021 X (that's 6 years)
- If you aren't sure, contact Jan for help

10-Trustees and Officers

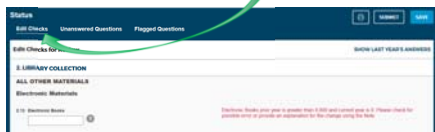
- 10.13 Is this trustee serving a full-term?** *If No, add a Note:
 - John is filling the remainder of Paul's term, which was to run from January 2020 – December 2022
- Oath of Office:** Only answer if public or school district.
 - Association libraries report N/A
 - Oaths must be taken within 30 days of election
- 10.23 Is this a Brand New Trustee?** Only answer yes if the Trustee has never served on *any* Library Board in the past
- Trustee Education – Use your 2020 trustees!
 - Trustee Name
 - Has the trustee participated in trustee education in the last calendar year (2020)? [y/n]

Lastly

- Click on Show Status to check and complete Edit Checks. Red edit checks messages must be transformed to green by completing the requested Note (Federal or State).



- Check to see if you have any unanswered questions; complete them if you do.



Lastly

- Print a copy for your files or save as a PDF.



- Do not send us a copy.
- When you have printed your copy click on the Blue SUBMIT button. This will lock you out of your report and will enable CCLS to begin its checking function.
- Remember to email Megan when you have submitted or if you are done but sections 2 and 4 are not complete.
- Great job! We will get back to you with questions. Please respond quickly!



January 27, 2021



Questions?
