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Is an Annual Report in Your Library's Future?

Kristin Cheney

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Kristin A. Cheney**

Ms. Cheney examines the multifaceted document known as the library annual report and offers suggestions on how to create a report appropriate to a library's objectives and institutional setting.

¶1 This article is an outgrowth of the annual reports section that I authored for the *Marketing Toolkit for Academic Law Libraries* produced by the AALL Academic Law Libraries Special Interest Section in 2004.[1] At the time, I was interested in producing an annual report, although it had been languishing for months in the aspirational, but nonproductive, discussion phase. Now, a year later, my initial enthusiasm for such an undertaking has been tempered with the pragmatism gained from having actually generated such a document. Was the final product worth the time and effort that went into creating, publishing, and distributing it? Yes. In retrospect, would I do anything differently? *Yes!!*

¶2 This article reflects, in part, my own experiences as an annual report writing novice. However, realizing that one report did not qualify me as an expert on the subject, before daring to guide others through the process I decided to survey other academic law libraries to determine their practices regarding publishing an annual report. Of the 188 American Bar Association (ABA) approved law schools[2] contacted, 127 completed surveys were returned, a 68% response rate. Of the 127, 52 law libraries indicated that they currently publish an annual report, while 75 do not presently do so.[3] Although the survey furnished valuable quantitative data, it was the anecdotal information contained in the comments sections that I found most useful. Throughout this article I have tried to share these institutional insights and at the same time maintain respondent anonymity.

¶3 *Is an Annual Report in Your Library's Future?* focuses on the content, structure, and dissemination of annual reports in an academic setting; however, many

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1. Kristin Cheney, *Annual Reports in Academic Law Libraries, in* MARKETING TOOLKIT FOR ACADEMIC LAW LIBRARIES (Barbara Bintliff ed., 2004), *at* http://www.aallnet.org/sis/allsis/Toolkit/annualreport.html.
2. Since the survey was conducted in October/November 2004, the ABA has given provisional approval to two additional schools, John Marshall Law School (Atlanta) and Western State University College of Law (Fullerton, Calif.), bringing the total of approved schools conferring the J.D. degree to 190. *See* AM. BAR ASS'N, *ABA Approved Law Schools, Number of Law Schools* [¶ 1], *at* www.abanet.org/legaled/approvedlawschools/approved.html (last visited May 3, 2005).
3. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 3).

of the observations and suggestions are equally applicable to reports produced by court and law firm libraries, as well as those generated by county, state, and federal agency law libraries.

Annual Report Basics

¶4 Annual reports come in all shapes, sizes, and formats and often include:

- mission statement
- major accomplishments and significant occurrences
- statistical and narrative summaries of departmental operations and activities
- financial reviews
- personnel summaries (appointments, promotions, professional activities)
- objectives for the year just completed
- discussion of future goals and needs
- outline of problems and solutions
- comparative data with other libraries
- acknowledgment of major gifts and contributions; recognition of school and community support

¶5 What information you choose to include in your annual report will depend to a large extent on the goals and objectives of your report and to whom the report is directed. Therefore, it is important at the outset to (1) determine what you are trying to accomplish by generating this document (i.e., what are your goals and objectives?), and (2) identify your target audience.

Objectives

¶6 Is the goal or purpose of your annual report best described as a vehicle to (1) communicate a summary of yearly activities and operations, (2) educate your audience regarding your resources and services, (3) promote the importance and value of library services and resources, (4) gather library-related data for internal analysis, or (5) serve as the historical record of that year's activities? While these are purposes frequently identified for library annual reports,[4] don't be alarmed if your objectives do not fit neatly into one of these categories. Actually, that's a good sign. While the primary objective of your annual report will directly influence its content and tone, that does not preclude you from designing a report that will serve multiple internal and external purposes. When developed to its fullest potential, your annual report can achieve a variety of administrative, promotional, educational, and managerial goals without sacrificing your main objective.

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4. *See* JANA BRADLEY & LARRY BRADLEY, IMPROVING WRITTEN COMMUNICATION IN LIBRARIES 232–34 (1988) (discussing purposes for an annual report).

Statistical Summary

¶7 For some institutions the primary reason for generating an annual report is to satisfy a yearly reporting requirement. Several of the responding libraries indicated that complying with the administration's mandate was, in fact, the *sole* reason that they participate in and will continue to participate in this yearly activity.[5] An annual report that is written to satisfy university record-keeping purposes or to comply with state legislative requirements typically contains detailed statistical and financial information broken down by department. Often the report must adhere to a pre-established format designed to facilitate incorporation into the more all-encompassing report required of (or prepared by) the parent institution.

¶8 While a standardized reporting structure influences a report's content and tone, opportunities to achieve multiple objectives are nonetheless available. For example, in the case of a state-supported institution, you can illustrate not only what you are doing with public funds, but also how the taxpayer is benefitting from these programs and services. The report can serve as a vehicle of accountability, as well as cultivate an appreciation for the library's endeavors.[6] In addition, much of your report can be recycled for use in other library publications, such as an upcoming self-study, or included as part of your ABA and Association of American Law Schools site inspection materials.

Education

¶9 An annual report can also serve as a tool to educate your target audience regarding what it is that you do, how you envision building on your activities, and what resources are necessary to accomplish your objectives. By identifying future goals, you can alert your audience to significant challenges that your library is facing (e.g., budgetary, personnel, space) and thereby lay the foundation not only for discussing these future needs, but also for subtly (or maybe not so subtly) lobbying for future funding.

¶10 Facing rising costs, shrinking budgets, and fluctuating student enrollment, today's institutions must critically evaluate expenditures made in all departments. Although most of us feel that our budget is woefully inadequate, the library accounts for a significant portion of the law school's budget.[7] As anyone who has served on a law school's budget committee can attest, the library is viewed by all too many as the *black hole* into which the law school shovels hundreds of thousands of dollars each year.[8] Failing to show where those dollars go and how they benefit

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5. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (comments for Question 12).
6. Benedict Leerburger, *Basic Publicity Techniques for Public Libraries, in* ISSUES IN LIBRARY MANAGEMENT: A READER FOR THE PROFESSIONAL LIBRARIAN 128, 149 (1984).
7. *See* Section of Legal Educ. & Admissions to the Bar, Am. Bar Ass'n, Law Library Comprehensive Statistical Table—Data from Fall 2003 Annual Questionnaire (2004) [hereinafter ABA 2003 Statistical Table] (results of Question 52, percentage of total law school budget represented by total library expenditures: mean, 13.4%; median, 12.1%).
8. *See id.* (results of Question 51, total dollars spent on law library last fiscal year: mean, $2,323,951; median, $2,012,701).

faculty, students, alumni, and other users can lead the administration to conclude that the library's budget line need not be increased or, worse, can be decreased![9]

Marketing and Promotion

¶11 In this world of highly scrutinized funding, librarians must aggressively extol library virtues to all members of the community that influence the library's future. Just because we as librarians understand and appreciate the intrinsic value of library services, does not mean that our users or potential users are equally enlightened. We cannot expect our users to respect and appreciate our services if they do not know about them. A library's promotional objectives can be general (e.g., showcase major accomplishments and projects) or specific (e.g., introduce new alumni services). But whether your objectives are general or specific, or more likely both, keep in mind the old saying: "Be careful what you ask for . . . you just might get it." With heightened awareness can come increased service demands and expectations which you must be prepared to support.

Managerial

¶12 In addition to serving as a communications, educational, or marketing tool, the annual report can also fulfill a variety of managerial purposes. As a compendium of the year's activities, the report's data provides a mechanism for the library director to objectively review the year, analyze statistics, gauge accomplishments, and, if necessary, reallocate resources.

¶13 It is human nature to become vested in library activities that you have initiated and promoted. Reviewing the library through the eyes of the annual report allows an administrator to more dispassionately assess the strengths and weaknesses of programs as well as to identify what services may need further promotion or conversely no longer require the same level of attention.[10] Comparisons to previous years' data allow the director, the supervisor, or both to identify trends (e.g., public patron usage has increased each year for the past four years; checkouts of selected open reserve materials have remained constant despite the increased online availability of these same materials) and can serve as a benchmark to measure service activities and performances (e.g., number of online reference interactions reflect a 60% increase since the new Web site was unveiled; implementation of the new interlibrary loan system has resulted in a 38% increase in student borrowing requests).[11] This data can then be factored into future planning and prioritizing. Approximately one-third of the libraries responding "yes" indicated that their annual report served as the basis for the evaluation of current programs and services, as well as for the setting of future goals.[12]

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9. Daniel Callison, *Annual Report*, SCH. LIBR. MEDIA ACTIVITIES MONTHLY, Nov. 2003, at 40, 40.
10. Kari Inglis, *How Did That Year Stack Up? The Value of Annual Reports*, OHIO MEDIA SPECTRUM, Summer/Fall 2001, at 28, 29.
11. NORMAN STEVENS, COMMUNICATION THROUGHOUT LIBRARIES 101 (1983).
12. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (comments for Questions 11 & 12).

¶14 In addition to providing staff with an overall picture of the library and its direction, the process of compiling an annual report can serve as a basis for review and future planning with your staff.[13] A majority of academic law libraries average seventeen or more professional staff and librarians; roughly one-third of all academic law libraries employ twenty or more professional staff and librarians.[14] Of the responding libraries, forty-five had twenty or more staff members.[15] It is not surprising that in libraries of this size, some staff members may be unaware of activities that occur outside of their immediate department (e.g., technical services staff unfamiliar with newly introduced e-reference service; circulation staff unaware of project to catalog electronic resources). Staff involvement in compiling and producing the report can generate not only an awareness of, but also a sense of pride in, both personal and departmental accomplishments.[16] When looking at our annual report, even I was taken aback at how much the library had achieved over the past year!

Audience

¶15 Once you have determined the goals of your annual report, it should be fairly easy to identify your primary audience which is most often comprised of those persons who either determine or directly influence the library's policies and budget (e.g., dean, university administration, state legislature, library committee, key faculty). Other potential audiences include students, staff, alumni, donors, and the general public.[17]

¶16 Most annual reports are quasi-public or public documents and are distributed to a variety of audiences. However, in certain instances annual reports are written to a one-person audience (e.g., dean requests that the report address specific personnel and salary issues). Because a report may necessarily contain confidential or sensitive information, it is important to determine as best you can who will eventually read this report and the future use of that information. Comments pertaining to specific personnel situations are inappropriate if the report will be read by staff, students, alumni . . . or the world if placed on the Web. In most instances, situations involving confidential or sensitive information are better addressed in a "special purpose" memo, rather than included in a more widely disseminated annual report.

Content Rules of Thumb

¶17 As goals change from year to year, so will the content of your annual report. For example, an inaugural annual report, designed to acquaint the reader with the

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13. STEVENS, *supra* 11, at 101.

14. ABA 2003 Statistical Table, *supra* note 7 (results of Question 24.2, Number of full-time librarians and full-time equivalent part-time librarians, other full-time professional staff and full-time equivalent part-time professional staff, full-time support and full-time equivalent part-time support staff).

15. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 2).

16. Leerburger, *supra* note 6, at 150.

17. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 4).

library and its services, will likely contain a detailed library overview replete with background and historical information. In contrast, the following year's report has less need to provide this general information, but instead can concentrate on particular activities (e.g., technology's integral role in library operations; library outreach to campus community). Putting aside the institutional specifics of each year's report content, it may be helpful to consider some content-related *rules of thumb* when writing your annual report.

¶18 **Specify your time frame.** Visibly indicate what time period your report covers (e.g., academic year, calendar year, fiscal year). A majority of the reports I reviewed used the law school's fiscal year as the criteria for content inclusion, which makes perfect sense in that academic law libraries already gather this fiscal-year-based information for the ABA's Law School Annual Questionnaire.

¶19 **Set a positive, upbeat tone.** Although you should identify and address problems—even failures—do not dwell on them. "Save your prose for your accomplishments and plans for the future."[18] If you have pinpointed an existing problem, follow up with potential ways of addressing the issue (e.g., would you need additional funding? Would you need additional staff? Would you need additional space?)[19]

¶20 In some instances you may be able to offer only a partial solution to the problem. That's okay. Candidly reporting the issues not only can actually increase the library's reputation for credibility, it also can generate external support for your problem-solving efforts.[20]

¶21 **Look to the future as well as to the present.** Your target audience is interested in where the library is going as well as where it currently is.[21] The library's visions and plans for the future—and the challenges that the library is facing—can either be addressed in a separate section or topically interspersed throughout the report depending on the organizational structure of your content. (Caveat: If you include upcoming events to illustrate future plans, be sure that these events actually take place.)

¶22 **"Eschew esoteric and sesquipedalian verbiage."** Translation: Say it concisely and simply.[22] Avoid library jargon (e.g., "loan transactions," "bibliographic utility"). If your primary audience does not have a working familiarity with the library, the statistical and financial information should be interpreted for the layperson.

¶23 **Do not be overly comprehensive.** There is a fine line between providing a full overview of the library's operations and activities and overwhelming your

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18. Judith Seiss, *How to Write an Annual Report*, ONE PERSON LIBR., Dec. 1998, at 3, 3.
19. Alice Norton, *What Every Library Needs (and Why)—An Annual Report, in* PERSUASIVE PUBLIC RELATIONS FOR LIBRARIES 154, 156 (Kathleen Kelly Rummel & Esther Perica eds., 1983).
20. *Id.*
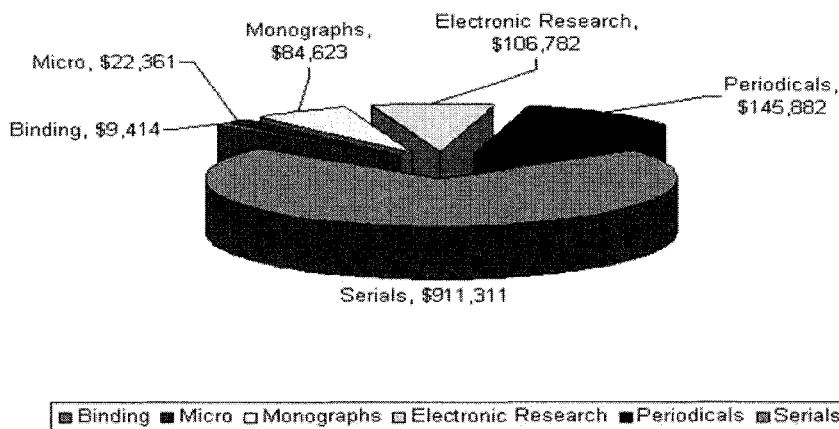21. MARIAN EDSALL, LIBRARY PROMOTION HANDBOOK 97 (1980).
22. Eli Oboler, *Selling the Academic Library, in* PUBLIC RELATIONS FOR LIBRARIES: ESSAYS IN COMMUNICATIONS TECHNIQUES 133, 137 (Allan Angoff ed., 1973).

reader with library minutiae. An overly detailed report runs the risk of obscuring your message. "One of the major reasons some annual reports fail to stir much interest is that all items are treated equally. The result is that nothing sticks in the reader's mind. . . . It is far better to pick a few items and give them more detailed attention than try to cover everything."[23] If your institution follows a pre-designated format, consider creating an additional "quick read" prefatory version.[24]

¶24 **One picture is worth a thousand words.** Well, maybe not a thousand, but there are times when a photo or illustration can convey your message better than a lengthy explanation. Don't forget to send the camera on the road (e.g., photo of librarian setting up traveling exhibit at community center or presenting at a conference). Include a caption if the visual is not self-explanatory. For each unit of text, an equal amount of space should be given to photos or other graphics.[25]

¶25 **Statistics do not have to be dull.** Colorful graphs, charts, and diagrams allow the reader to better visualize your statistics and are particularly effective when portraying budget allocations, depicting trends over time, or displaying proportional relationships between data. For example, in its 2003–2004 annual report, the University of North Carolina's Kathrine R. Everett Law Library used a basic pie chart to present a variety of book budget expenditure statistics. In one readily understandable graphic, the report provided a visual synopsis of the types of materials purchased, the costs related to each category of materials, and the percentage of the budget allocated to each category.[26]

2003-2004 Book Budget Expenditure

Monographs, $84,623
Electronic Research, $106,782
Micro, $22,361
Periodicals, $145,882
Binding, $9,414
Serials, $911,311

■ Binding ■ Micro □ Monographs □ Electronic Research ■ Periodicals ■ Serials

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23. EDSALL, *supra* note 21, at 93.
24. *See infra* ¶ 55 (discussing summary annual reports).
25. EDSALL, *supra* note 21, at 97.
26. UNIV. OF N.C., KATHRINE R. EVERETT LAW LIBRARY, ANNUAL REPORT, July 1, 2003–June 30, 2004, at 10 (2004).

¶26 Statistics can be both informative and humorous. For example, the Personnel section of Seattle University Law Library's report contains a highlighted box with the following text.[27]

> Did you know? Bob Menanteaux, Susan Kezele, Nancy Minton, Donna Turner, Kelly
> Kunsch and Michael Zubitis represent 130 years of library experience at Seattle
> University Law Library!

Although presented in a lighthearted manner, this statistic effectively reflected the level of staff expertise available to the library user.

¶27 To grab your audience's attention, place statistics within a local context. For example, in the late 1970s the Cincinnati Public Library's annual report pointed out that more people used the library than the total number of persons "attending the Reds and Bengals[28] games, the Opera, the Symphony, Playhouse in the Park, and the Art Museum."[29] Although written more than twenty-five years ago, this statistical presentation structure could easily be adapted for use in a present-day context.

¶28 Statistical comparisons with libraries at similarly situated law schools (i.e., schools with similar size student bodies, competing for the same students, or in geographic proximity) can be useful, particularly when you are illustrating your own library's comparative lack of funds, staff, or space. (Caveat 1: Don't compare institutional apples and oranges; indicate the basis for a "peer institution" designation.) (Caveat 2: If your statistical comparisons place you soundly ahead of the pack, avoid unnecessarily downgrading the competition. Consider relegating specific comparisons to private internal communications and instead offering annual report comparisons based on ABA categorical ratings.)

¶29 **Avoid technology glitches.** If using an electronic format, be sure that the average computer can view and navigate within the report satisfactorily. Check that all links to additional material (e.g., lower-level Web pages, attachments, external Web sites) are working. You do not want your audience focusing on technical problems rather than concentrating on your message.[30]

¶30 **An alternative title provides flexibility.** Although an annual report focuses on a specific time period, it does not necessarily have to contain the term "annual report" in its title. Perhaps you lack adequate staff or the financial resources to publish a report each year, or maybe you just do not want to tie yourself down to the inevitability of this yearly process. If so, do not set yourself up for failure by formally characterizing your document as an "annual" report, but rather adopt a

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27. SEATTLE UNIV. LAW LIBRARY, APPRAISING OUR PAST, CHARTING OUR FUTURE, *Personnel* [¶] 2 (Oct. 2004), *at* http://www.law.seattleu.edu/library/report2004/personnel.asp.
28. Attendance at the 1978 and 1979 Bengals games may not have added much to that statistic as the team went 4–12–0, finishing last in the AFC Central Division in both years.
29. EDSALL, *supra* note 21, at 95.
30. Cosette Kies, *Library Marketing and PR Promotion Techniques, in* MARKETING AND PUBLIC RELATIONS FOR LIBRARIES 101, 107 (1987).

more flexible title. A first-time report can be described as an "inaugural" report or a report on "the state of the library." After considering various titles, we finally selected *Appraising Our Past, Charting Our Future* as the title of Seattle University Law Library's initial report because it accurately described the contents, had a positive tone and, above all, did not obligate us to an annual publication.

¶31 If a yearly report is not a feasible goal, perhaps a well-timed "special" or "anniversary" report is in your future. Producing a full-blown report every two or three years with a summary annual report on interim years is still another alternative to an annual publication.[31]

Compiling Content

¶32 Creating an annual report does not have to be a stressful, time-consuming experience. Advance planning and delegation of duties are key factors in producing a first-rate product without sacrificing the sanity of all involved.

¶33 Although some libraries condense the entire activity into less than a month, I prefer a longer range, less hectic approach and heartily agree with those who recommend gathering content throughout the year, even to the point of beginning to plan for the following year's report before the current one is completed.[32] From initial planning stage to finished product, SU's *Appraising our Past, Charting our Future* spanned approximately twelve months.

- Late Oct. 2003—Director meets with ad hoc committee and outlines plans for annual report; circulates examples from other institutions for review. Committee later brainstorms ideas (categories/topics, themes, statistics; layout).
- Nov. 2003—Director/Committee draft report outline.
- Dec. 2003—Director/Committee determine statistical categories and method for gathering in-house, non-ABA-required statistics.
- Jan. 2003—Report outline and proposed statistical gathering methods presented to department heads and librarian/supervisors for feedback.
- Feb. 2004—Feedback reviewed; report outline and statistical gathering methods revised.
- March/April 2004—Departments gather predetermined statistics.
- May 2004—Begin drafting substantive report.
- June 2004—Update draft with fiscal year-end data.
- July 2004—Review and revise report textual content; select relevant photos; determine main text versus "attachment" or lower-level text.
- Aug. 2004—Create Web-based report layout; finalize statistics and graphs; produce audio/video clips; prepare links and attachments.

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31. Martha Jo Sani, *Does the Corporate Annual Report Have a Future?* COLO. LIBR., Mar. 1991, at 5, 6. *See infra* ¶ 55 (discussing summary annual reports).

32. EDSALL, *supra* note 21, at 93.

- Sept. 2004—Continue to revise Web layout; add photos; complete links, graphs, and attachments; bring in "new eyes" to review and proofread.
- Early Oct. 2004—HTML report distributed.
- Late Oct. 2004—Print report distributed.

Although I admit to padding our production schedule, the more lead time you give yourself and your staff, the better.

¶34 Establishing an idea folder into which you can place random bits of information (e.g., notes of significant activities and events, unusual reference questions, appropriate quotes and cartoons, examples of attractive layouts and brochures, library-related photographs, excerpts from letters or phone calls from patrons that highlight various aspects of library services) is an easy way to collect potentially useful content. Remember to include those "little" events that in and of themselves are not earthshaking, but which deserve acknowledgment. For example, during one typical week contributions to the tickler file included an invitation to the library's summer series of in-house peer training sessions, an announcement of our upcoming membership in a large Pacific Northwest-based consortium, fan mail from an appreciative alumni, and an impromptu photo of staff reshelving the entire fourth floor classified collection shortly after an earthquake tossed every book to the floor . . . well, okay, I guess that was actually an earthshaking event, but you get the idea.

¶35 Library highlights and events tend to dim with time. In addition to an idea file, maintaining a monthly calendar that notes significant activities and events is another simple method to gather yearly data and further ensures that the first time you remember to include a line or two on a library-hosted reception or exhibit opening is not the day *after* your report is distributed.

¶36 Much of your annual report's content can be pulled from other library publications (e.g., monthly or quarterly departmental reports, newsletters, announcements), as well as from statistics prepared for ABA and AALL questionnaires. In compiling the Seattle University Law Library report, we included edited versions of text from *Info,* the library's quarterly online newsletter (www.law. seattleu.edu/library/newsletter), library columns featured in the student-published *Prolific Reporter,* library announcements submitted to the university's *Broadway and Madison* faculty and staff newsletter, as well as event information posted on our in-house *Docket* (www.law.seattleu.edu/docket) or included in the law school's *Correspondent,* a weekly faculty and staff online newsletter (www.law.seattleu.edu/ correspondent). In addition, we reviewed the notes from our bimonthly librarians'/ supervisors' meetings as yet another means of identifying possible content.

¶37 Drafting this document need not be a one-person venture. A majority of the libraries surveyed indicated that producing the annual report is a collaborative effort involving every department and most, if not all, staff members.[33] But

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33. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 10).

whether or not involved in report production, it is essential that all library person-nel understand the report's message and objectives.[34] Prior to the targeted distri-bution, the director should meet with all staff and discuss the report's content to ensure that everyone has not only read the report but also can respond to potential questions from external report recipients.

¶38 Although eight of the surveyed directors indicated that they personally supervise the process from beginning to end, the predominant modus operandi was to create an annual report committee with whom the director initially meets to outline and discuss potential content and production requirements.[35] The com-mittee chair subsequently assumes primary responsibility for assigning specific project activities, maintaining focus on report objectives, and monitoring activities to ensure that the project stays on schedule. Although I have no definitive data, my guess is that the typical drafting and production process is a combination of the director-centric model and the committee-based team approach with the level of directorial involvement varying according to each director's working style.

Organizing Content

¶39 Your report's predetermined objectives will not only influence the content of your document but also how you choose to organize and present that content. A carefully thought-out and well organized report can strengthen your message and influence how the target audience perceives the library, while an unimaginative, sterile, statistic-filled report can conceivably undermine your objectives.[36]

¶40 Survey respondents who indicated that their library did produce an annual report were further asked to categorize the organizational scheme of their report (i.e., departmental headings, topical subject headings, genre headings, headline headings).[37] In retrospect, this poorly worded question was flawed in several ways. For example, the survey did not indicate whether or not respondents could select more than one category to characterize their report's organizational structure, or whether the respondents could create additional categories to describe the content framework. Nevertheless, undeterred by the lack of credible data, I will, with but brief pause, go out on the proverbial limb and offer the following generalizations regarding report structure.

¶41 A majority of the forty-five responding libraries indicated that their annual report was organized according to department headings (e.g., Administration, Public Services, Technical Services, Computer Services), topical subject headings

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34. Norton, *supra* note 19, at 154; ANNE ROBERTS & SUSAN GRISWOLD BLANDY, PUBLIC RELATIONS FOR LIBRARIANS 28 (1989); Leerburger, *supra* note 6, at 150.

35. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 10).

36. Callison, *supra* note 9, at 41; Gary Hartzell, *A Show of Strength—Written Reports Should Convey How Much Your Program Has to Offer,* SCH. LIBR. J., May 2003, at 45, 45.

37. *See* BRADLEY & BRADLEY, *supra* note 4, at 241–44 (1988) (examples of annual report organizational structures).

(e.g., Financial Summary, Library Collection, Library Services, Personnel), or a combination of both.[38] Similar in approach, these two structures concentrate on specific departmental units or unit-related activities. Both organizational frameworks tend to produce long, statistically detailed reports which, while presenting a comprehensive picture of each department or departmental activity, have inherent difficulties in providing the reader with an integrated overview of the library. However, libraries using one or both of these approaches can effectively address this structural downside by beginning their report with a general overview or highlights section.[39]

¶42 Eleven libraries indicated that their report structure was based on, or at least partially employed, a headline structure, (e.g., Library Resources Meet Community Needs, Who Uses Our Library?).[40] Headline or thematic reports are great at capturing the attention of your audience, provided you have selected a theme with which the reader can relate. Selecting a message that can be consistently interwoven throughout your report can be very tricky; an all-encompassing theme runs the risk of coming across as bland, while a specific theme will dictate and restrict your report content. Vermont Law School's Cornell Library *2003 Year in Review*[41] is an impressive example of a thematic-based publication. The overriding theme of the six-page brochure—the many and varied roles assumed by law librarians—provides a springboard for an assortment of subtopics (i.e., librarian as: legal information professionals; information managers; teachers and trainers; information technologists; budget managers; leaders, innovators and members of the community) without sacrificing the central message. Each section of this very accessible report is composed of short, active sentences describing role attributes, followed by a listing of the 2002–03 activities specific to that category. For example:

As TEACHERS and TRAINERS we:

> TEACH legal information literacy, how to choose and use information resources and technology for maximum benefits.
> TEACH beginning and advanced courses in legal information research.
> CONDUCT workshops on information technology skills for faculty, students and staff.
> PROVIDE research instruction in doctrinal courses, focusing on specific areas of law.
> PROVIDE one-to-one research instruction to students, faculty, faculty research assistants and staff.
> PROVIDE instruction to student groups, including the Law Review and Moot Court competitions.

In 2002–2003:

- Taught eight sections of first year legal research. . . .
- Taught two internet workshops. . . .[42]

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38. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 9).
39. BRADLEY & BRADLEY, *supra* note 4, at 243.
40. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 9).
41. JULIEN & VIRGINIA CORNELL LIBRARY, VT. LAW SCH., 2003 THE YEAR IN REVIEW (2003).
42. *Id.* at [4].

¶43 When selecting a theme, it may help to review reports from other institutions. After all, a theme need not be original to be effectively adapted to your particular library. There is nothing wrong in recycling a good idea that has worked for someone else.

¶44 As you can see, none of these organizational models are mutually exclusive. One-third of the responding libraries indicated that their report structure was a combination of two or more of the four possible categories.[43] For example, since its inception in 2003, the University of Nevada, Las Vegas' Wiener-Rogers Law Library annual report has skillfully combined standard subject headings (e.g., Law Library Staff, Collection Statistics, Collection Budget) with catchy headlines (e.g., Outreach To You!!, Facing the Future, Paradise Lost—And Found).[44] What structure or blend of structures you choose as the best way to organize your report content will be influenced by your particular goals, your target audience, and your institution.

Format and Distribution

¶45 Not long ago, choosing what format your annual report would take and how you would distribute this final product were often topics separately addressed. With the advent of the electronic revolution, conversations pertaining to report format and means of delivery have become inextricably interwoven. No longer are format options limited to selecting either an in-house generated Word or WordPerfect document or a more expensive professional-looking, commercially typeset publication. Nor does your distribution plan consist solely of determining how many copies to mail versus how many to distribute by hand. Increased availability of user-friendly graphics and publishing software, as well as affordable, high-quality computer hardware and peripheral equipment such as color printers, scanners, digital cameras, and storage systems, facilitate the creation of in-house documents rivaling commercially produced publications. In addition to print, today's reports can be produced in a variety of nonprint formats (e.g., PDF, HTML, CD-ROM) and distributed electronically to audiences worldwide.

¶46 What medium you select will vary depending on the audience you are trying to reach. You may ultimately decide that the heterogeneity of your goals and diversity of your intended audience will require producing an annual report in multiple formats. For example, while an online version may play well with your technologically sophisticated students and faculty, a traditional print publication may prove more effective with your alumni and donors. Of the forty-eight libraries that responded to the survey's format-related question, only ten indicated that

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43. Based on post-survey phone discussions with respondents, it is likely that this combination structure was significantly under-reported due to Questions 9's wording. *See supra* ¶ 40.

44. *See, e.g.*, UNIV. OF NEV., LAS VEGAS, WILLIAM S. BOYD SCH. OF LAW, WIENER-ROGERS LAW LIBRARY, ANNUAL REPORT 2002–2003 (2003).

they currently offer their report in more than one format and, surprisingly, more than three-quarters responded that their annual report is available only as a print document.[45] Only six libraries indicated that an electronic version would be added in the upcoming year.[46]

¶47 Today's technology allows you not only to present your report in a variety of formats, but also facilitates production of several versions of the report, each tailored to a specific audience. For example, you may decide that although all of your report versions will contain a summary of major accomplishments and special projects, the dean's version will also include more specific budget and expenditures information, an assessment of current services, and a discussion of the need for additional staffing. Similarly, student or faculty versions could emphasize services and resources specific to their needs.

¶48 Regardless of how many report versions you produce or what formats you choose, your annual report must have a professional, yet "eye-catching" appearance. Its outer appearance, whether on printed page or screen, must grab the reader's attention and pique interest to the point of further exploration. It will not make any difference how informative and well-written your content is if your core audience never bothers to read the report. Successful annual reports are a combination of an appealing exterior coupled with an engaging interior.

¶49 The timing of your annual report's distribution can also play a critical role in whether or not it reaches and is read by its intended audience. Today's online users are inundated with hundreds of e-mails on a daily basis. Summarily deleting items based on a quick assessment of the subject line has become the standard operating procedure for many.

¶50 I was so proud of the Seattle University Law Library's report, *Appraising our Past, Charting our Future*, that I wanted to get it into the hands, or in this case onto the screens, of the law school's faculty and administration as soon as possible after it was completed. Within minutes of project completion, the report was distributed to our target audience via an e-mail announcement.[47] Unfortunately, I selected one of the busiest days of the year for distribution. In addition to coinciding with the first week of school, it collided with a flurry of faculty-directed e-mails addressing committee assignments, classroom reassignments, upcoming faculty candidate interviews, tenure reviews, and self-study preparations. After several days had elapsed with virtually no feedback, faculty were randomly

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45. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 6).
46. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 8).
47. "Marking the five-year anniversary of the Law School's move to Sullivan Hall, the Law Library is proud to announce the publication of, '*Appraising Our Past, Charting Our Future*.' This Web-based report is designed to provide the casual reader with a concise summary of each library department's activities, services and goals, while furnishing additional information for those individuals desiring a more in-depth approach. We hope that you will find the combination of text, photos, graphs, audio/ video clips and internet links, both informative and entertaining." E-mail from Kristin A. Cheney, Executive Law Librarian, Seattle University School of Law, to Seattle University School of Law Faculty and Staff (Oct. 5, 2004) (copy on file with author).

queried for their comments on the report. Only two faculty even remembered seeing the report's e-mail announcement. Of the faculty polled, approximately one-third admitted that due to time constraints they deleted much of their daily e-mail without actually opening it up to view the contents, and presumably our announcement had fallen into that group. Another third indicated that they had not as yet opened the message which meant that each day's new, unopened messages were burying the library's report deeper and deeper into e-mail oblivion. The remaining third indicated that they had in fact opened the message and were hoping to find the time to actually read some of the content, but admitted that this might be an overly optimistic aspiration. In retrospect, delaying the report's distribution by several days would have made a positive difference in its initial impact on the intended audience.

¶51 In addition to gaining a new respect for the importance of timing, this experience also led me to appreciate the necessity of offering our report in multiple formats on multiple occasions. Upon realizing that the library's online offering had gone largely unnoticed, we quickly reproduced our report using an in-house color printer, distributed these print copies to the administration and department directors and placed copies in both the faculty and staff lounges. All copies included a URL reference to the more comprehensive online report. Although our second distribution increased awareness of the report, it would have been preferable to have orchestrated our report's introduction more effectively from the beginning.

¶52 *If* the library does produce a report in the next year, our distribution likely will follow a three-step approach:

- Step 1—Several days of pre-introduction hype (e.g., e-mail; mention in newsletter, on the *Docket*, or in the *Correspondent*) designed to alert our audience to the upcoming report and to hopefully stimulate interest in its content.
- Step 2—Activate Web site announcement and distribute report to audience via e-mail.
- Step 3—Redistribute report in hard copy to primary audience.

¶53 The level of in-house expertise and size of your budget will undoubtedly influence both your report design and dissemination choices. While not all libraries have the resources to create a Flash-based online report or to pay for outside production, desktop publishing software and basic print to online conversion techniques provide the ability to create a professional-looking document to meet the sophisticated expectations of today's readers. Although the Web is certainly a cost-effective means of distributing your report, print may still be among your format selections. If so, assuming that your report content is appropriate for general consumption, do not forget to factor miscellaneous distribution into your print run calculations. Increasing your production by five to ten percent will add little to the overall cost and is well worth the expense when compared to the potential value of further disseminating your message to new faculty or faculty candidates, distinguished guests and visitors, etc.

Alternatives to Annual Reports

¶54 Is an annual report appropriate for your library? Unless your library falls into the category of institutions with mandatory reporting requirements, your answer will require balancing the benefits gained (e.g., promotes library, educates reader, provides historical perspective) versus the costs (staff time, production expense) of creating this document. More than 35% of the libraries responding to my survey indicated that they do not currently publish an annual report nor do they plan to do so in the future.[48] Several schools indicated that despite their best efforts, the library's reports were habitually met with deafening silence and consequently were discontinued in favor of more productive avenues of communication.[49] "On the spot discussions," monthly reports, news releases, and, in one instance, meetings with the Library Committee, were viewed as more effective means of spreading the library message at their respective institutions.[50] Additional comments pointed to an increased use in targeted newsletters (both print and electronic) or topic-specific brochures as alternative ways of providing up-to-date information related to new resources, special events, personnel and policy changes, and professional development activities.[51]

¶55 Rather than trying to tell the library's entire story, perhaps a corporate-style summary annual report (SAR) would best suit your objectives.[52] In a world where time is money, corporations often produce a "quick read" SAR in addition to their traditional annual report. Similar to the corporate audience, university administrators and faculty also operate under time constraints and must prioritize their activities accordingly. By offering a condensed version in lieu of, or in addition to, a more comprehensive report, the library can potentially reach this limited-reading-time audience. (Not to be confused with the limited-attention-span audience, although this format will work for those individuals equally as well.)

Next Year's Report

¶56 Although I continue to believe that the benefits derived from producing an annual report outweigh the costs of such an undertaking, my views regarding what the Seattle University's Law Library future reports will encompass, what format they will take, how they will be distributed, and to whom they will be distributed have changed dramatically.

¶57 Next year's report (yes, we will be producing one), will differ from our 2004 report in several ways. *Appraising our Past, Charting our Future* was so informa-

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48. *See infra* Appendix, Summary and Analysis of Annual Reports Survey (results for Question 13).
49. *Id.*
50. *Id.*
51. *Id.*
52. *See* Sani, *supra* note 31, at 8 (discussing the summary annual report, a condensed presentation intended to be more readable and understandable than the traditional annual report).

tionally comprehensive that it would have taken the average reader the better part of a day to view the materials, let alone digest them. The 2005 version will be more a vignette than a tome. A SAR approach sounds very appealing at the moment and could rotate biennially, or as necessary, with a more detailed version. Additionally, the brevity of a SAR would allow our library to stretch its print budget to cover the printing of additional copies or to explore commercial print options.

¶58 Our 2004 report was envisioned and subsequently designed as an HTML document composed of multilayered text, photos, graphs, audio and video clips, and Internet links. Consistent with studies indicating that people rarely read Web pages word by word but rather scan the text,[53] our consciously concise online content employed scannable text (e.g., highlighted keywords, typeface variations, bulleted lists, graphics) to a higher degree than would be typical of a one-dimensional print document. As an HTML document, our report warrants high marks. However, when converted to a linear print-based report, this robust offering forfeited some of its vitality. A significant portion of the report's content (e.g., audio and video clips, lower-level pages) was not readily transferable to a print format. Further, our carefully crafted freestanding text, while perfectly suited to an online presentation, lacked the textual fluency necessary to a sequentially read print document. So, although the Seattle University Law Library will continue to provide an electronic version and a print counterpart, we may adopt a PDF format which would have the same ease of distribution as did our HTML document, but that could more easily avoid these translation pitfalls.

Conclusion

¶59 Is an annual report right for your library? That is a tough question to answer because what constitutes an annual report can vary greatly from institution to institution, as well as internally from year to year. Each report is its own unique, fact-specific document. Generating such a document requires a series of multifaceted choices that will influence and shape what ultimately becomes your final product. Questions regarding your report's objectives, audience, content, format, and distribution must all be addressed along the way. I hope that you are now a little better equipped to answer these questions. Good luck!

53. JAKOB NIELSEN, HOW USERS READ ON THE WEB (Oct. 1997), *at* http://www.useit.com/alertbox/9710a.html; JOHN MORKES & JAKOB NIELSEN, CONCISE, SCANNABLE, AND OBJECTIVE: HOW TO WRITE FOR THE WEB (1997), *at* http://www.useit.com/papers/webwriting/writing.html.

Appendix
Summary and Analysis of Annual Reports Survey

Survey results were obtained in two ways. Initially the survey was electronically distributed to all academic law library directors and associate deans for information services on October 18, 2004, using the Academic Law Library Directors Discussion List (lawlibdir@lists.washlaw.edu). A follow-up survey request was mailed (U.S. Postal) on November 5, 2004, to directors who had not yet responded.

Of the 188 ABA-approved law schools contacted, 127 responses were received. This is a 68% response rate. The percentage of responses from private institutions was marginally higher than those submitted by public institutions: 73 responses from private institutions) 108 possible private institutions = 72% response rate;[54] 54 responses from public institutions) 80 possible public institutions = 67% response rate.[55]

The following is a report of the survey responses and comment summaries. The survey results are divided into two sets of responses: law libraries that do publish an annual report and libraries that do not currently publish an annual report. The number of usable replies is shown in brackets immediately following each question.

Although this survey provided valuable information, it was not intended as a "scientific" device but rather as a relatively informal means of gathering anecdotal-type information. Questions requiring qualitative responses are reflected in a summary/comments structure and more thoroughly discussed within the article.

Libraries That Do Publish an Annual Report

1. Is your institution private or public? (N = 52)

30 private institutions
22 public institutions

2. What size staff do you have? (The term "staff" includes librarians and library paraprofessionals, as well as technology personnel who report to the library director.) (N = 52)

(Note: the original text unintentionally created overlapping categories (i.e., staff size of 10–20, staff size of 20–30). To correct this error, data from responding

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53. JAKOB NIELSEN, HOW USERS READ ON THE WEB (Oct. 1997), *at* http://www.useit.com/alertbox/9710a. html; JOHN MORKES & JAKOB NIELSEN, CONCISE, SCANNABLE, AND OBJECTIVE: HOW TO WRITE FOR THE WEB (1997), *at* http://www.useit.com/papers/webwriting/writing.html.

54. As indicated earlier, *see supra* note 2, the ABA has approved two additional schools—both private— since the time the survey was conducted in October/November 2004. Consequently, the number of private schools approved by the ABA is now 110, rather than 108. *See* AM. BAR ASS'N, *ABA Approved Law Schools, Private Law Schools, at* www.abanet.org/legaled/approvedlawschools/private.html (last visited May 3, 2005).

55. *See* AM. BAR ASS'N, *ABA Approved Law Schools, Public Law Schools, at* www.abanet.org/legaled/ approvedlawschools/public.html (last visited May 3, 2005).

libraries was reorganized into nonduplicative categories (i.e., 10–19, 20–29, 30 or more) based on Law Library Comprehensive Statistical Table—Data from Fall 2003 Annual Questionnaire, Question 24.2 (FTE Lib Staff—Number of full-time librarians and full-time equivalent part-time librarians, other full-time professional staff and full-time equivalent part-time professional staff, full-time support and full-time equivalent part-time support staff.)

Staff Size	# of Schools
Less than 10	2
10–19	32
20–29	16
30 or more	2

3. Do you publish an annual report? (N = 52)

Fifty-two of the 127 responding libraries (42% of the respondents) indicated that they currently publish an annual report.

4. To whom is this report distributed? (Check all that apply.) (N = 50)

Distributed To	# of Schools
Dean	46
Law Faculty	20
Law Staff	12
Law Students	3
Law Alumni	4
University Community	14
Donors	3
General Public	1
Other	20

Eight of the libraries included law library staff in the "other" category; it is unclear whether other respondents included law library staff within the larger "law staff" category. Comments indicated that the "other" category also reflected distribution to the following: University Library Director or Dean of Libraries, Office of Admissions, Development Office, Law School Library Committee, faculty and librarian candidates, selected alumni and members of the bar, and other law libraries. Additionally, it was pointed out that if distributed as a Web-based document, an annual report's audience was essentially anyone with computer access.

5. Although you may distribute your report to many of the above groups, which group(s) do you consider as the primary audience(s)? (N = 50)

Primary Audience	# of Schools
Dean	27
Dean and Faculty	9

Dean and University	4
Faculty	2
Other	8

Although the Dean, followed by Faculty and University, was the most often targeted audience, other primary audience selections included law library staff, selected alumni and donors, Law School Library Committee, University Librarian, and, in one case, the County Law Library Board of Directors.

6. Is your report distributed as print, HTML, PDF, CD document? (Check all that apply.) (N = 49)

Report Format	# of Schools
Print only	38
PDF only	1
Print and HTML	4
Print and PDF	6

7. If your report is distributed in more than one format, explain why you use multiple formats. (N = 7)

Print copy distributed to target audience, in-house mailboxes, selected donors; Web used for general distribution. Cost limited the number of print copies produced; Web was cost-effective way of reaching large audience. Print provided permanent record; Web version questionable as historical document.

8. What, if any, format changes will you make with your next report and why? (N = 26)[56] (Note: Multicategory response from two institutions, i.e., media format change and decision to publish several textual versions.)

No change anticipated (15)
Will continue to produce print report, but add electronic version (6)
Will add limited number of print reports to current electronic report (2)
Will publish several versions (i.e., one formal report and one promotional or summary report) (3)

9. Annual reports can be organized in a variety of ways:
 a. **departmental headings (e.g., Administration, Public Services, Technical Services)**
 b. **subject headings (e.g., Financial Summary, Library Services, Staffing)**
 c. **genre headings (e.g., Highlights of the Year, Review of Objectives, Budgetary Review)**
 d. **headline headings (e.g., Library Resources Meet Community Needs, Who Uses the Library)**

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56. Low response level reflects wording of question which does not require a response if no format change anticipated.

How is your annual report organized and why? (N = 45; some institutions selected more than one organizational scheme)

Organizational Scheme	# of Schools
Departmental Headings	21
Subject Headings	24
Genre Headings	6
Headline Headings	11

10. Briefly describe how your annual report is compiled and written (i.e., who is involved in providing text, statistics, etc.? Who edits? Production time frame?). (N = 40)

Responses varied from director as sole writer and editor of report (N = 8) to all staff members involved in compiling and editing activities (N = 15); the majority of responses indicated joint involvement of department heads/supervisors and director.

Although many libraries gathered information throughout the year, actual production (writing and editing annual report document) time frames varied from several weeks to three months. The majority of responses indicated that the report was produced during the interval between close of the fiscal year (June 30) and submission of ABA annual questionnaire.

11. How would you rate your report using a cost (time and effort) vs benefit (promotes library, educates reader, etc.) analysis? (1–10 scale with 1 = definitely worth the time and effort and 10 = waste of time.) (N = 38)

Number on 1–10 Scale	# of Schools
1	8
2	5
3	7
4	3
5	7
6	2
7	2
8	0
9	2
10	2

More than three-fourths of the respondents indicated that the benefit of their report outweighed its costs. Respondents awarding 1, 2, or 3 generally concentrated on the internal, rather than the external, benefits derived from generating an annual report. Comments included: "great for goal setting and evaluation," "gives me the opportunity to reflect on the past and plan for the future," "as an

historical document can be used by future administrators," and "useful when preparing for an ABA site inspection." Annual reports were viewed as an important promotional tool for newer schools or as a mechanism used to educate a new dean.

On the other end of the spectrum, eight respondents indicated that they produce an annual report only because it is an administrative requirement. Comments included: "[t]he dean needs something to send to central administration," "although it satisfies a mandatory requirement, no one reads it," and "some read it, but I use briefer, more targeted messages to reach students, faculty and alumni."

12. Do you plan to continue producing an annual report in the future?
(N = 41)

39 Yes
2 No

Libraries That Do Not Publish an Annual Report

1. Is your institution private or public? (N = 75)

43 private institutions
32 public institutions

2. What size staff do you have? (The term "staff" includes librarians and library paraprofessionals, as well as technology personnel who report to library director.) (N = 70) (Note: the original text unintentionally created overlapping categories (i.e., staff size of 10–20, staff size of 20–30). To correct this error, data from responding libraries was reorganized into nonduplicative categories (i.e., 10–19, 20–29, 30 or more) based on Law Library Comprehensive Statistical Table—Data from Fall 2003 Annual Questionnaire, Question 24.2 (FTE Lib Staff—Number of full-time librarians and full-time equivalent part-time librarians, other full-time professional staff and full-time equivalent part-time professional staff, full-time support and full-time equivalent part-time support staff).)

Staff Size	# of Schools
Less than 10	7
10–19	41
20–29	18
30 or more	9

3. Do you publish an annual report? (N = 75)

Seventy-five of the responding libraries (58% of the respondents) indicated that they do not currently publish an annual report.

13. Do you plan to produce an annual report in the future? (N = 65)

21 Yes
44 No

14a. Have you previously produced an annual report, but at some point have discontinued publication? (N = 64)

22 Yes
42 No

b. If so, why? (N = 19)

The majority of respondents indicated that the amount of time and effort involved in production was not justifiable as the report was not valued by the institution and/or not read by the target audience(s). Other comments included: "no longer required by the Dean or University," "[e]-mail and other less formal forms of communication have eliminated need for annual report," and "current staff level/turnover temporarily precludes production."