

The Annual Report: A Culmination of the Year-long

Guidelines for Annual Reports at a Library Staff Meeting

- Speak for no longer than five minutes about the accomplishments of the department or unit.
- Make sure an introduction is included. It may involve introducing the staff, defining the unit major responsibilities or goals, or outlining your presentation.
- Handouts are okay. Keep them short, simple, clear, and concise. Statistics and lists are fine, but don't overwhelm the audience.
- Try to use humor or examples in the presentation. It holds audience's attention and can relax you.
- Take the positive approach, but include things that have not been accomplished or those that did not work out as planned. If something negative has occurred (e.g., falling statistics), identify a positive outcome or new direction developed in response to the negative.
- Briefly highlight the major events in the department. Include changes in day-to-day operations if there was a benefit to another program or project. List enhancements to continuing tasks. Spotlight new things that have occurred. Use comparisons from previous years if they help illustrate a point.
- Don't use names unless there truly is only one person or specific group that worked on a project. Use "we" to give the presentation a team approach.
- Conclusions should be brief. Encourage questions. Thank people for their attention. Close on a polite note.

The annual report in today's frantic paced world is often a summary of the institution's document, a hurriedly written page or two, or not even produced. It should be the culmination of a year-long annual planning process. Although annual reports may have a bad reputation, this should be ignored as they are great tools for a number of developmental purposes. With all the encouragement that AALL has given to strategic planning, and the support it has given to planning in the affiliated organizations, individual members should be much more in tune with the concept of planning. "The [AALL] Strategic Plan is a tool to provide structure and focus to all Association activities. It is the framework for Association Committees, SISs, and Chapters for developing activities and programs." (Preamble, AALL 2000–2005 Strategic Plan: "Leadership for the 21st Century: New Realities, Changing Roles")

Ultimately, documents and time lines drive the planning process. Annual reports are important as "... an opportunity to consolidate information about library activities, to synthesize it and draw conclusions, and to use it in looking ahead to the next year." (p. 232, *Improving Written Communication in Libraries*, Bradley, 1988) Annual reports wrap up planning from one year and begin the process for the next, promote staff development in areas including time management and presentation skills, and serve as a showcase of emphasizing the value of library staff and resources.

The Planning Process

Instituting a successful planning process can be a daunting task. There are volumes written on the topic. The goal of this article is to show that the process can be fairly easy and painless, or excruciating and time-consuming, depending on the approach. In a straightforward process, January is spent working with staff to create lists of projects, major system changes, staffing issues, and other issues in each unit or department. Staff should prioritize. A complete list of departmental and library-wide priorities is developed from the information listed and presented to the staff in February. Let people know the rationale for including or excluding items. Staff should be reminded that a wrench could be thrown into the mix at any

moment, preventing completion of all items on the list. They should be assured that something will get done during the course of the year! Even in AALL, an organization with a strong planning process, it must be remembered that a plan "is the tool for choosing among competing priorities for Association resources—such as member and staff time, and fiscal resources. All activities must be evaluated against the Strategic Plan to assure that they help move the Association toward the Vision." (Preamble, AALL 2000–2005 Strategic Plan: "Leadership for the 21st Century: New Realities, Changing Roles") Emphasize the importance of the plan and encourage reliance on it by keeping the list in the forefront, and referring to it in meetings with key supervisors. Updates should be provided at meetings, a midyear status report prepared, and meetings held with supervisors to check progress and realign priorities as needed.

In November, summarize the progress and begin thinking about priorities for the next year. This is the beginning of the annual report process. The routine for developing the report is simple and can be used over and over. This is our second year of the full process. We have discovered that it is important to build into the system time for analyzing and fine-tuning the process itself. The Report timeline should be flexible. Ours looks like this:

- November 1–15: Functional area supervisors meet with staff to compile a list of accomplishments;
- November 15–25: Supervisors electronically exchange lists for comment, feedback, and inclusion of missed items;
- Last week of November: Working lunch with supervisors to review lists, discuss the planning process, and review the guidelines and format of the December staff meeting.

This time frame is based on an institution with a calendar year budget. It is just as easy to transfer the timeframe into the more traditional year that academics use (August through July). The most important step to take is the initial meeting with a few staff members to talk about the future. This helps people get into a planning mode.

Planning Process

by Duane A. Strojny

Staff Development

The “showcase” portion of the annual report is the fun part. The end product is a document, a tangible product to give to the dean, the supervising attorney, or the board of directors, and maybe most important, your patrons. Document development begins when functional area reports are created by combining monthly reports compiled during the course of the year with staff input.

Our goal is to include verbal reports from functional area supervisors based on written documents the last staff meeting of the year (see box for guidelines for the December meeting). It can be exhilarating and daunting to create handouts, write a presentation, and deliver it to a group of 25 peers. These presentations create an opportunity for someone to shine—especially for individuals who are not regularly involved in any type of teaching, or those who deal with a small staff. For those whose regular audience comprises law students or junior associates, the different audience makeup fosters new presentation techniques. Since there are predetermined deadlines, the process of pulling information together for the annual report does not overtake daily tasks.

The Annual Report

Portions of the documents created in each functional area in preparation for the verbal report are included in the library annual report. It’s not yet a glossy document, but it is quite spiffy looking. Use a watermark of the library building created with a digital camera. Superimpose the library mission statement. Make the content informative and interesting. An introductory statement by the director and a reprint of the library goals set the tone for a multi-page listing of accomplishments. Include statistics where appropriate, but do not overwhelm the reader. A sprinkle of “pats on the back” and a heavy dose of “why we are indispensable” makes the library a public relations dream. The conclusion describes plans for the coming year and lets the reader know that we are serious about our planning process. Although there are not many materials describing how to write annual reports, many libraries and businesses write them. Look at other reports for examples and ideas. The format for the AALL report is colorful and informative. It keeps everything in short snippets, creating a clear and easy-to-read document that is not overwhelming. Remember, it is always nice not to reinvent the wheel and there are many current models to review.

Conclusion

Annual reports can be very satisfying. Many people might think of the annual report as a mechanism to justify the existence of the library or fight for resources, but it is much more than that. “No single publication can do more to enhance its reputation and increase its budget than its annual report.” (*Law Librarianship; A Handbook*, Chapter 2, “Administration of Academic Libraries,” p. 33, Roy M. Mersky) The cumulative document serves as a capstone of accomplishments both for historical and prospective purposes. The staff development opportunities, planning aspects, and overall positive benefits of compiling an annual report make the time put into the project well worth the effort. Use the annual report as an item that can be widely distributed and be a source of pride for the staff. Mark the report progress on the calendar, make it part of the planning process, and take a little extra time to show your patrons what you do. Report it!

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