



## The Annual Report: An Overlooked Opportunity to Tell the Library's Story

by Jean M. Holcomb

*The Professional Development Committee, which coordinates the "PDC Desktop Learning Opportunity Series," encourages members to explore professional development offerings and opportunities at the local, regional and national levels. We welcome your comments and article suggestions. Please contact Lori Hedstrom at 651/687-5891 or lori.hedstrom@thomson.com.*



At the height of the stock market boom and dot.com start-up frenzy, unveiling a company's annual report was a media event that would rival the excitement generated in simpler times by the arrival of the circus. While performing elephants and trapeze artists might be big-ticket methods to capture the imagination and hold the attention of viewers, any library can create an annual

report with sizzle by following a simple set of drafting considerations.

### Pack a Promotional Punch

A more difficult hurdle to overcome than the mechanics of writing the report might be assigning the report to a library staff member not required to produce such a document as part of his or her duties. Although a library's staff already finds its days filled with pressing tasks, persuading staff members that an annual report's benefits outweigh the added workload should not require the persuasive skills of a circus barker. Beyond the clear-cut public relations and marketing value, a law library annual report highlights a library's fiscal and professional accomplishments, reinforcing the value of law librarians — particularly in a weakened economy.

In this era of renewed focus on corporate accountability, heightened attention now focuses on the details of an organization's annual report. Publicly held corporations are obligated to describe their activities to their shareholders in annual reports. Nonprofit and governmental entities often face similar requirements to produce annual reports. Many law libraries, particularly those that are not a part of larger parent organizations, are also required to recount their annual performance. Other libraries choose to tell their stories through annual reports even when they don't have such a mandate. While not all law libraries face formal reporting responsibilities, the opportunity to create an annual report should not be overlooked by any law library.

An annual report helps a law library gain allies, educate supporters and lobby others whose support may be critical to the library's long-term stability as a stand-alone

institution or as a part of a larger organization. If the library is a division or branch of a larger parent organization, the annual report demonstrates the critical role a library plays as a member of the team carrying out the organization's overall mission. In libraries with a small staff, preparing an annual report may rest in the hands of a single individual. Being a solo librarian doesn't preclude the production of an annual report. Rather, a small library stands to benefit from the significant promotional punch an annual report can pack just as much as, if not more than, a large institution with other sophisticated public relations or marketing tools at its disposal. Telling a law library's story yearly helps a library put its own spin on the challenges and opportunities the library faces.

An annual report reminds library administrators — whether it be a board of trustees, a library partner, a presiding judge or the dean of a law school — and the library staff about how the library has met milestones and seized opportunities. Because many of the challenges a law library faces can't be solved in one year, the annual report provides a measuring stick to mark progress toward long-term goals.

For example, Rita Dermody, collection access services librarian at the King County Law Library in Seattle, has been leading her library's five-year effort to replace its antiquated card catalog and home-grown classification scheme with a state-of-the-art automated system. Since 1998, she has updated her team's progress every year in the library's annual report. "The annual report provided opportunities to tell a complex story in bite-sized pieces," Dermody says. "Telling a story in installments also offers opportunities to publicly acknowledge and celebrate success points."

Creating an annual report varies depending on the library's function and size. Yet regardless of the size of the library's staff, the content, tone and style of an annual report provides a fascinating glimpse into the heart of a library's operation. A powerful story can be told independently of the size of the library's staff if the author or editing team considers a short list of questions:

- Who will be the primary audience for the annual report?
- What will be the theme that ties all of the elements of the story together?
- Which of the library's activities from the prior year should be included?

- How will the drafting, editing and publishing tasks be accomplished?
- How will the project budget be determined?
- When will be the optimum time for publishing and distributing the annual report?

The answers to these questions will help a law library staff create an annual report that provides a clear picture of the state of the library.

## Define the Audience

A library should first identify the primary audience for its annual report. Although a library's mission statement may define its services, some who benefit from the library's services may not be part of the audience easily reached by the annual report. The "who" in the classic journalist's check list of "who, what, when, where, why and how" that forms the outline for a well-constructed story might be the management team of a large law firm already deluged with information. The readers of a public law library's annual report might be the general public who rely on the services of a public law library but as individuals remain mostly anonymous to the library staff. An academic library's annual report could target law school alumni whose ties to their alma mater have loosened over time. The exercise of choosing the report's primary audience helps the editing team select the appropriate frame of reference for the stories that will be included.

## Tie It Up With a Theme

The frame of reference or theme for the annual report binds all of the elements of the story into a unified whole. Although most libraries are operating in an environment of escalating prices and diminishing resources, the stories in an annual report should shine on the library's efforts to address these problems, such as curbing expenses or reaching out to a new audience. For example, describe how your library has campaigned for a local politician and legislation that will increase the library's revenue. Explain how the library has diversified its collection resources. Under-score opportunities the library has taken to use low- or no-cost electronic and Web-based resources to control collection spending. While the annual report should not avoid the library's problems, the report should explain how the library has overcome those obstacles. The ability to see something positive in a challenge delivers a message that will resonate with the reader.

## Basic Building Blocks

The theme can be carried out in a variety of ways. The graphics and art on the cover of the report set the tone for the story inside and may include the theme's tag line. Repeating the cover graphic throughout the report highlights activities that exemplify the theme. An introductory message from the director or other managerial or administrative party should state and explain the choice of the theme.

For example, to illustrate the King County Law Library's efforts to predict and respond to change, one of its annual reports had a yellow cover with a road sign graphic that stated, "Caution — Changing Times Ahead." The theme "Taking It to the Streets" emphasized the library's message of service to the community, with the road sign graphic used throughout the report to introduce profiles of various segments of the community served by the library.

### AALL Professional Development Program Competencies of Law Librarianship

- 1 Core Competencies
- Specialized Competencies
- 2 **Library Management**
- 3 Reference, Research and Client Services
- 4 Information Technology
- 5 Collection Care and Management
- 6 Teaching

This article addresses the AALL Specialized Competency on Library Management. The complete AALL statement of Competencies of Law Librarianship is online at <http://www.aallnet.org/prodev/competencies.asp>.

After choosing a theme, the library needs to decide what library activities of the prior year to include. Certain standard elements appear in annual reports regardless of the type of law library. Annual reports always include a cover page; a table of contents for longer reports; a welcome message from the library director or the library's governing body; features that discuss major areas of the library's operation, such as collection management and public service; and annual financial or budget reports. Other elements of the report examine the library's progress on achieving goals set in its strategic plan and outline the library's plans for the year ahead.

In addition to the requisite elements, an annual report can also include one-time features or regular columns that highlight a library's accomplishments. Provide details if

the library received an award, started a new service, won a grant, met a major milestone or faced a significant challenge. Call attention to the library staff's leadership role in activities within the organization, the law library profession and the broader community outside the library. Identify training opportunities provided by library staff. Mention publications the library produced. Successful fund-raising events deserve prominent placement. Spotlight the library's achievement of a legislative goal or other activity that involved collaboration with another group by including quotations from individuals outside the library staff, thus adding an objective tone to the report.

## The Editor's Role

Once the theme and coverage have been decided, appoint the editor for the report. Empowering one staff member to make decisions about the editing, format and production of the annual report in advance helps avoid bruising writers' egos if their stories require editing or trimming.

The editor should set editorial guidelines and word limits to the articles assigned. If there will be more than one author contributing to the report, create a brief style manual to foster uniformity in the final document. Write copy in the active voice rather than the passive. Resist the urge to employ library jargon. Solicit help with proofreading.

Keep in mind that the best person on staff to write an article for the annual report is not always a librarian. The annual report tells the story of the library as a whole, not as the sole preserve of the librarians. When preparing an annual report, involve the broadest range of staff possible to produce a comprehensive document that reminds readers of the work completed in the prior year by the library as a team. For example, a library technician who collects user statistics and has prior experience in graphic design may be just the right staff member to create a visually dynamic illustration of circulation statistics. A graduate student intern with editing skills can bring an experienced, neutral eye to correcting typos and run-on sentences.

The editor should also determine the general style for page layout and design. Choose a typeface and size for headlines, body text, pull quotations and sidebars. Plan to vary story format to include charts, graphs and art.

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Setting the publication schedule for an annual report often rests in the hands of the person responsible for producing the report, such as the editor. Some libraries tie the reporting period to the budget year or to the educational calendar for the institution. When looking for the best time to write the report, carefully weigh times that should be avoided. For example, a law firm library may not want to prepare its annual report when the firm's summer associates arrive. If there's no required date for publication, consider choosing a date that fits the annual "life cycle" of the parent institution or the library. An academic law library, for example, may want to prepare its annual report in the summer when many students are on vacation and distribute the report in the fall semester as students and faculty return to school.

### **Battle of the Budget**

The budget for the production and distribution of the annual report will depend on a variety of factors. For all libraries, the goal will be to achieve the highest quality within the constraints of the budget.

Small libraries can reduce costs by keeping most of the production and editorial development in-house. Print on demand may satisfy the requirements for a small library. Take advantage of the power and cost-effectiveness of the Web — display the library's annual report on the library Web site, thereby eliminating both printing and mailing costs. The report can be sent via e-mail as an attachment or a link to the location on the library Web site. Consider sending the annual report with a personalized cover letter to key members of the distribution chain to further emphasize the library's message in the annual report.

Some larger libraries can afford to use freelance editors and designers and printing companies to produce their annual reports. Because the annual reports of large libraries are sometimes part of their parent organizations' publications, the parent organizations may absorb the costs of the law libraries' annual reports.

### **What Worked ... What Didn't?**

After the annual report reaches its audience, the library staff should reflect on what worked

well and what could be improved with the next drafting process. To institutionalize the preparation of the annual report, create a file for the next report at the completion of the current report. Add notes to the file to jog memories about important events as they occur. Review other publications created by the library for articles that could be edited and recycled. Scan minutes of meetings for reminders. Search the Web for examples of other libraries' annual reports, such as the annual report of the Social Library at <http://www.sociallaw.com/annualreport/>, to get fresh ideas. Solicit comments and suggestions from readers of the annual report.

Finally, take a moment to bask in the praise that will surely come from readers as they peruse a carefully plotted and visually attractive annual report that highlights the value of their law library.

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