THE PUBLIC LIBRARIES SURVEY

Welcome!

Please introduce yourself in the chat:
- Name
- Library
- Years invovled with survey

Overview fiscal year 2024-2025

Hello!

Amanda Johnson

Data Analysis & Communication Consultant
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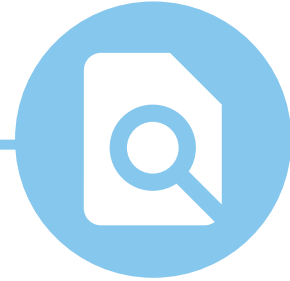
SLNC Data Webpage

How can I help you?

Public Libraries `Survey

- Manage Public LIbrary Survey collection in North Carolina
- Aggregate, analyze and disseminate data to IMLS, local libraries, and other stakeholders.
- Create tools and resources to help libraries use survey data to plan, advocate and support local services.

Evaluation Plans

- Developing evaluation plans for specific services or projects including grant applications
- Advise on methodologies, design of collection tools (surveys, focus groups, interviews, etc), and analysis

Communicating Data

- Trainings on communicating data
- Statewide publications on the impact of libraries
- Templates for local use:
  - General Infographics
  - Day in the District handouts
  - Library Week Social Media templates
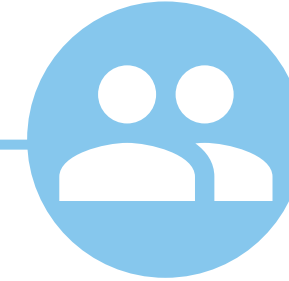
Data tools:

PLA Benchmark (Opt-in)

Public Libraries Survey
aka: Annual Statistical Report

Part 1: Structure and People

    Federal Cooperative System

    Authorization and management

Part 2: The PLS in North Carolina

    FY24 Timeline

    LibPAS & Instructions

    The PLS section by section

        Modifications

        Common Mistakes

PART 1:
STRUCTURE & PEOPLE

The PLS is a federal-state cooperative data collection

Agencies and organizations "with similar strong interests in producing accurate, reliable, annual state and national public library statistics"*
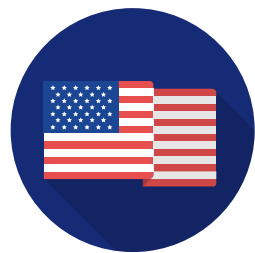
National Level
Institute of Museum and Library Services

State Level
State Library Agencies in all 50 states, D.C., and territories

Local Level
~9,300 Public Libraries

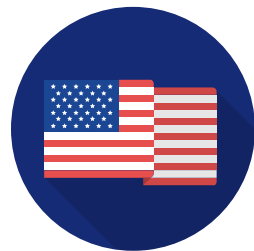*An Action Plan for a Federal State Cooperative System for Public Library Data: FSCS. United States, Task Force, 1989.

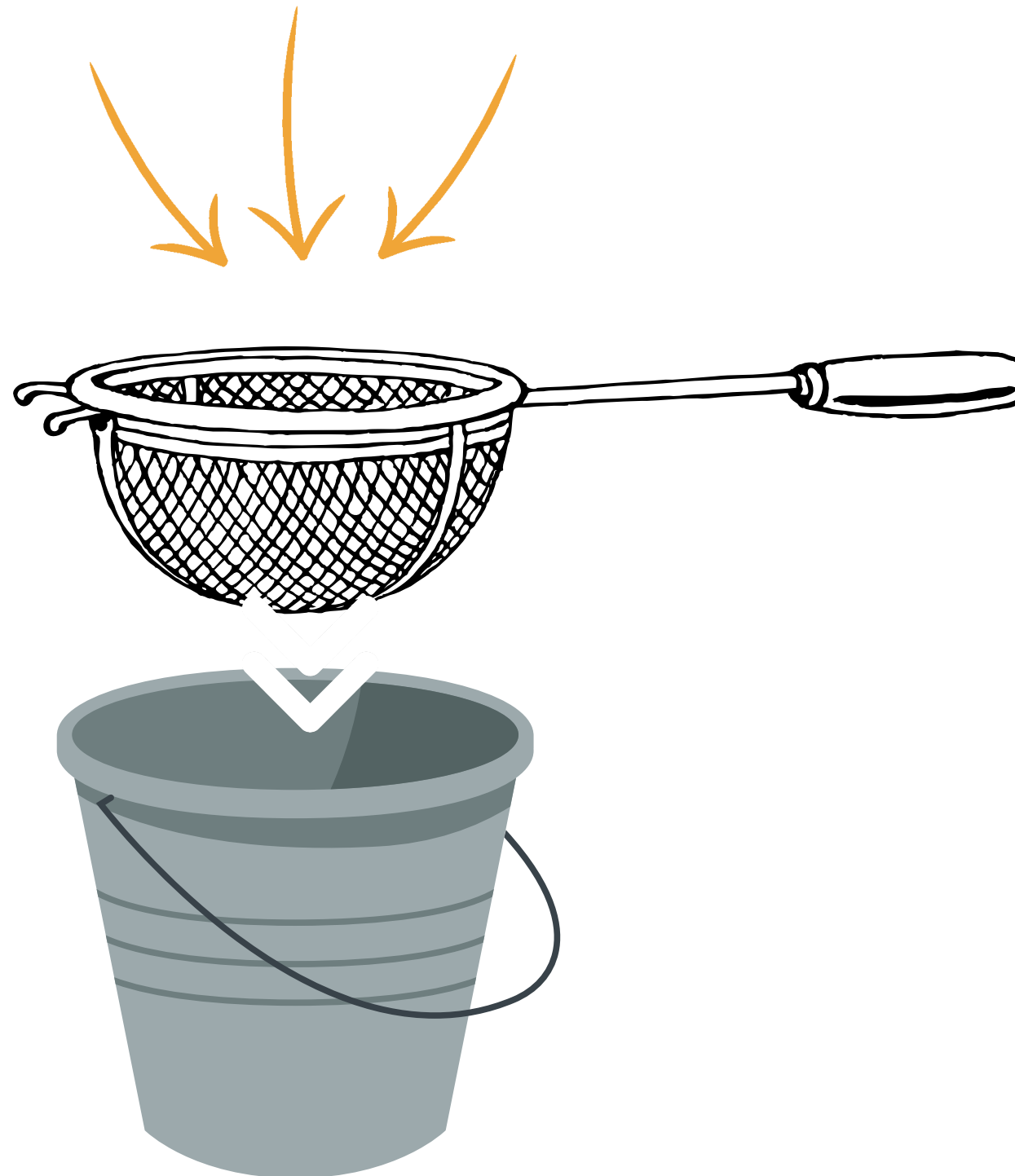# Federal-State Cooperative System

Local Level

State Level

Federal Level

DATA

It takes many people to pull off the PLS...

National Level

- Institute of Museum & Library Services (IMLS)
- Technical Contractors
- Library Statistics Working Group (advise IMLS)

State Level

- State Data Coordinators
- State Data Coordinator Mentors (Advise other SDCs)
- Chief Officers of State Library Agencies
- Software Vendors

Local Level

- Staff from ~9,300 local libraries collecting & submitting data

Why is this important?

How is PLS data used?

General

- IMLS research briefs
- IMLS search & compare tools
- PLA, ALA, 3rd party tools
- Gregory Gilpin - Return on investment research
- NYPL - Diversity initiative
- AARP Livability Index

North Carolina

- Strategic Planning
- Grant writing
- NC PL Standards Development
- NC DIT Digital Resource Finder
- Local government benchmarking
  - Catawba outcome based budgeting
  - Burke KPI development

Part 2:
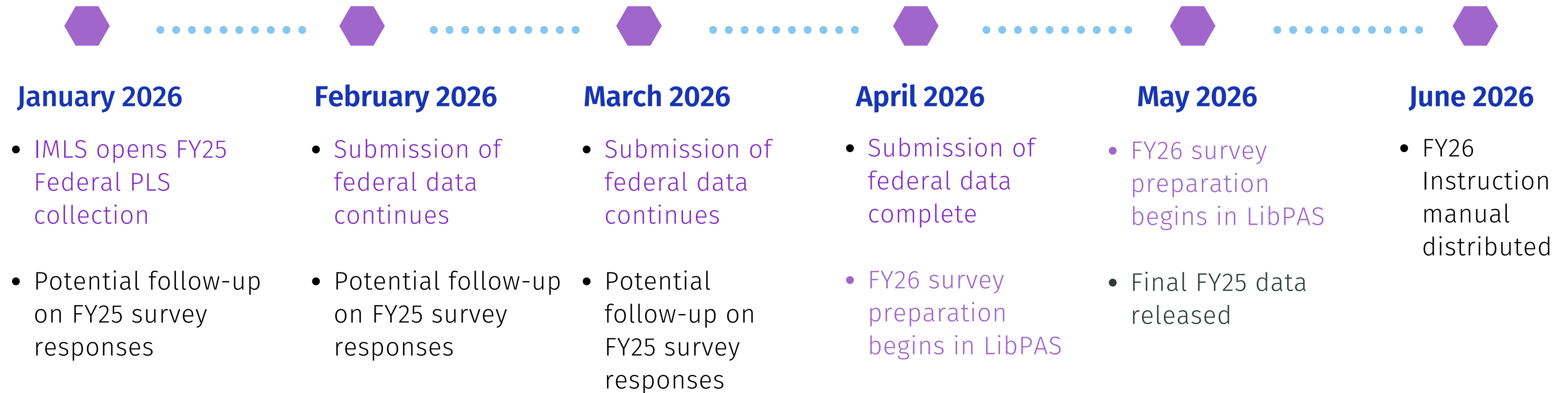# The Public Libraries Survey in North Carolina

a.k.a. Annual Statistical Report

Yearly Cycle

July 2025

- FY25 survey opens on July 15 for the reporting for July 1, 2025- June 30, 2026*

- LibPAS input training will be on July 22, at 11am
 Register:

August 2025

- FY25 survey remains open

September 2025

- FY245 Survey closes on September 16, 2025

- Review of FY25 data begins

October 2025

- IMLS releases FY25 data elements that passed state vote.

- Review of FY25 data continues

November 2025

- Review of FY25 data wraps up

- Development of draft FY25 tables begins

December 2025

- FY25 preliminary data released

Yearly Cycle

January 2026

- IMLS opens FY25 Federal PLS collection
- Potential follow-up on FY25 survey responses

February 2026

- Submission of federal data continues
- Potential follow-up on FY25 survey responses

March 2026

- Submission of federal data continues
- Potential follow-up on FY25 survey responses

April 2026

- Submission of federal data complete
- FY26 survey preparation begins in LibPAS

May 2026

- FY26 survey preparation begins in LibPAS
- Final FY25 data released

June 2026

- FY26 Instruction manual distributed

LibPAS

- Username and password is specific to library
- Find resources and status updates on the homepage
- All data must be submitted through LibPAS
  - Some verification throughout input process and you must resolve errors before you can submit
    - Lock = submit

LibPAS input training will be on July 22 at 11am. Register:

Welcome State Library of North Carolina

Public Libraries Survey	Standards Self-Assessment (OPTIONAL)
Non-recurring SFRF State Aid	

Public Libraries Statistics
(click above to enter and submit data)

FY25 Public Libraries Survey Documentation

New! Check out the PLS Report Data webpage. These materials are publicly available and include the updated instruction guide and information on training sessions.

Pre-fill/After-fill Data Status:
State Income (State Aid, SFRF):
LSTA Grant Income:
NC Live:
e-iNC:
NC Kids:
NC Cardinal:
NCDL:

Additional Resources:
FY23 Primary Peer Groups

Instruction Guide

Draft instructions are available. A final version will be available when the survey opens on July 15, 2025.

The instruction guide includes:

- Survey overview + dates
- Section overview and guidance
- Full data element definitions
- What to include or exclude for specific elements
- Auto-calculated field formulas
- Notes on pre-filled data
- Formatted to be printed and shared - sections separated by page breaks

Excel Worbook

Download the draft workbook:

Survey Sections

A. PLSC Code
B. General Information
C. Library Staff
D. Operating Income
E. Operating Expenditures
F. Capital Revenue & Expenditures

G. Collection
H. Circulation*
I. Registered Users & Visits*
J. Programming
K. Other Service Metrics
L. Technology
M. Outlet Information

* Denotes the section has modifications for FY25

Summary of Modifications

- Auto-renewals
- Student card program reporting
- Certifications

Update! Outlet (Location) Specific Data

Background:

- IMLS pilot for eventual national roll-out
- Applies to limited data elements that are likely to vary by location
- Anticipated benefits:
  - Better integration with other data sets (American Community Survey, National Center for Education Statistics, etc)
  - Increased understanding of service availability and level
  - Quicker identification of possible errors

Sections affected:

G. Collection

H. Circulation

I. Registered Users & Visits

L. Technology

If data is not available for a particular location enter a -1.

A. PLSC Code

A. PLSC CODE

These data elements are reported to PLSC and are used to identify characteristics of the library system for comparative analysis. These values are prefill change from year to year. If changes are needed, please contact Amanda Johnson, amanda.johnson@ncdcr.gov.

☐	A.1. FSCS KEY (WebPLUS Identification Number)		NC0103
☐	A.2. LIB ID (State Assigned Identification Number)		C-ALAMANCE
☐	A.3. Interlibrary Relationship Code		Not a Member of a System, Federation or Cooperative Service. ⌄
☐	A.4. Legal Basis Code		County/Parish ⌄
☐	A.5. Administrative Structure Code		Administrative entity with Multiple Direct Service Outlets where ⌄
☐	A.6. FSCS Public Library Definition		Yes ⌄
☐	A.7. Geographic Code		County (exactly) ⌄
☐	A.8. Legal Service Area Boundary Change		No ⌄
☐	A.9. Population of the Legal Service Area		169,813

Notes:

- This section is prefilled and locked.
- When the survey opens, the population (A.9.) displayed is the prior year data. The population is updated in the fall when the certified estimates are released by OSMB. The population on the PLS matches the population used for the State Aid formula.

B. General Information

General Notes:
- Addresses and service outlets are prefilled and locked.
- Director contact information is prefilled but not locked
- B.28 Hours is auto-calculated using the hours input for branch in section M. Outlets

What's changing:
- **B.16 Local data coordinator**
- **B.21-22** add regarding Foundations & Friends Groups
- Deleted Fax numbers

C. Library Staff

Personnel Counts

Include all positions budgeted for as of the last fiscal day (June 30). This includes filled, vacant and temporary positions.

Count only positions requiring a master's degree from library and information sciences programs as librarians. DO NOT include individuals employed in positions that do not require a master's degree in the librarian count. Non-librarian positions should be reported as All Other Staff.

To compute full-time equivalents of employees in any category, take the number of hours worked per week by all employees in that category and divide it by 40.
Example: Two employees working 38 hours per week would be considered 1.9 FTE. (2 x 38/40 = 1.9)

☐	C.1. FTE Librarians with MLS accredited by ALA		839.23
☐	C.2. FTE Librarians with MLS not accredited by ALA		46.11
☐	C.3. Total Librarians	0.00	885.34
☐	C.4. FTE all other paid staff		2,424.18
☐	C.5. Total Paid Employees	0.00	3,309.52
☐	C.6. Volunteer hours		153,235 ☐ Unknown

Salaries

C.7. Director's Salary	C.8. Director's Salary Range	C.9. Year of Appointment of Library Director	C.10. Assistant Director Salary	C.11 Finance Officer Salary
$89,346	☐ N/A	☐ N/A	2,515,365 ☐ Not applicable	$1,525,286

Notes:

- Report all budgeted positions, even if the position is vacant
- FTE- full-time equivalent staff determined as 40hrs per week
  - Formula:
    - 2 staff members who work 35hrs
    - (2x35)/40= 1.75 FTE

Pop Quiz!

Example:

- 1 staff member works 10 hrs
- 2 staff members work 20hrs
- 1 staff member 2 works 40hrs

How many FTEs work at this library location?

Pop Quiz!

Correct Answer is 2.25 FTEs

Formula: (1x10) + (2x20) + (1x40) = 2.25 FTEs

Money (sections D-F)

General Notes:

- **The actual income and expenditures should be reported, only include funds received and expended during the reporting period.**
- Pay special attention when reporting income to ensure the correct year's data is input.
- LSTA, State Aid and other state grants are pre-filled
- Capital funds are short term or one-time allocations for major expenses i.e. renovations, buildings, ILS migration, etc.
  - If funds are allocated for a capital project and then reallocated to operational expenses, do not report them as capital.

What's changing:

- **E.5 Electronic Materials Expenditures:** modified to remove references to physical media and add references to additional types of information services and clarify that all expenditures related to electronic/digital/services should be included.
- **E. 6. Other Physical materials expenditures:** modified to add Physical to indicator name and clarify that circulating electronic devices (hardware) would be included.

G. Collections

Physical Collections

Fiction

Location		G.1. Cataloged Adult Fiction Books	G.2. Cataloged Young Adult Fiction Books		G.3. Cataloged Juvenile Fiction Books
MOBILE LIBRARY	Fiction			☐ ILS cannot provide this data	
MAY MEMORIAL LIBRARY	Fiction			☐ ILS cannot provide this data	
GRAHAM PUBLIC LIBRARY	Fiction			☐ ILS cannot provide this data	
MEBANE PUBLIC LIBRARY	Fiction			☐ ILS cannot provide this data	
NORTH PARK LIBRARY/COMMUNITY CENTER	Fiction			☐ ILS cannot provide this data	

Non-Fiction

Location		G.4. Cataloged Adult Non-fiction Books	G.5. Cataloged Young Adult Non-fiction Books		G.6. Cataloged Juvenile Non-fiction Books
MOBILE LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
MAY MEMORIAL LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
GRAHAM PUBLIC LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
MEBANE PUBLIC LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
NORTH PARK LIBRARY/COMMUNITY CENTER	Non-Fiction			☐ ILS cannot provide this data	

Total Cataloged

Location		G.7. Total Cataloged Adult Books	G.8. Total Cataloged Young Adult Books	G.9. Total Cataloged Juvenile Books	G.10. Total Book Volumes
MOBILE LIBRARY	Total				
MAY MEMORIAL LIBRARY	Total				
GRAHAM PUBLIC LIBRARY	Total				
MEBANE PUBLIC LIBRARY	Total				
NORTH PARK LIBRARY/COMMUNITY CENTER	Total				

Non-print analog materials

Location	G.11. Other Print Materials	G.12. Current Print Serial Subscriptions	G.13. Audio - Physical Units	G.14. Video - Physical Units	G.15. Other non-print analog materials
MOBILE LIBRARY					
MAY MEMORIAL LIBRARY					
GRAHAM PUBLIC LIBRARY					
MEBANE PUBLIC LIBRARY					
NORTH PARK LIBRARY/COMMUNITY CENTER					

G. Collections

Electronic Collections

General Notes:

- NCDL & eINC:
  - Consortial titles will be pre-filled
  - Add unshared advantage titles to collection counts
- For resources that use a patron driven purchasing model (i.e. Hoopla, RB Digital) as the primary subscription model, the collection count should match the usage count.
  - Assists with consistency and accuracy between electronic materials expenditures and collection counts
  - Accounts for budget limits

H. Circulation
Physical Circulation

H. CIRCULATION

For questions related to circulation count annual circulation of all library materials, including renewals. Count all materials in all formats that are charged out for use outside the library. Interlibrary loans checked out to users should be counted. Do not count intra-library loans (i.e. materials borrowed between branches) or items checked out to another library. Include NC CARDINAL ILLs.

Fiction

Location		H.1. Adult Fiction Book Circulation	H.2. Young Adult Fiction Book Circulation		H.3. Juvenile Fiction Book Circulation
MOBILE LIBRARY	Fiction			☐ ILS cannot provide this data	
MAY MEMORIAL LIBRARY	Fiction			☐ ILS cannot provide this data	
GRAHAM PUBLIC LIBRARY	Fiction			☐ ILS cannot provide this data	
MEBANE PUBLIC LIBRARY	Fiction			☐ ILS cannot provide this data	
NORTH PARK LIBRARY/COMMUNITY CENTER	Fiction			☐ ILS cannot provide this data	

Non-Fiction

Location		H.4. Adult Non-fiction Book Circulation	H.5. Young Adult Non-fiction Book Circulation		H.6. Juvenile Non-fiction Book Circulation
MOBILE LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
MAY MEMORIAL LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
GRAHAM PUBLIC LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
MEBANE PUBLIC LIBRARY	Non-Fiction			☐ ILS cannot provide this data	
NORTH PARK LIBRARY/COMMUNITY CENTER	Non-Fiction			☐ ILS cannot provide this data	

Total

Location		H.7. Total Adult Book Circulation	H.8. Total Young Adult Book Circulation	H.9. Total Juvenile Book Circulation
MOBILE LIBRARY	Total			
MAY MEMORIAL LIBRARY	Total			
GRAHAM PUBLIC LIBRARY	Total			
MEBANE PUBLIC LIBRARY	Total			
NORTH PARK LIBRARY/COMMUNITY CENTER	Total			

H. Circulation
Electronic Circulation

Consortial Circulation:

- Pre-filled NCDL & eINC usage includes ALL usage including unshared Advantage titles
- Usage of NC Live homegrown materials will appear in both NC Live and local Overdrive reports. I will subtract the duplication after the report closes.

I. Registered Users & Visits

I. REGISTERED USERS & VISITS

Registered Users

A registered user is a library user who has applied for and received an identification number or card from the public library that has established conditions under which the user may borrow library materials or gain access to other library resources. If you cannot distinguish between adults and juveniles in your catalog, count all registered users in the Adults field and enter "N/A" in the Juveniles fields. Note: Reported data must be based off files from which inactive users have been purged within the past three (3) years.

|		
I.1. Adults		52,129
I.2. Juveniles		36,094 ☐ ILS cannot provide this data
Total Registered Users		88,223
I.3. Does your library offer student cards to one or more k-12 schools in your area?		Yes, authentication based on student ID
1.4. Student Cards		36,781 ☐ ILS cannot provide this data

Library Visits

Location	I.5. Library Visits	I.6. Method of data collection: visits	Visits per open hour
MOBILE LIBRARY			
MAY MEMORIAL LIBRARY			
GRAHAM PUBLIC LIBRARY			
MEBANE PUBLIC LIBRARY			
NORTH PARK LIBRARY/COMMUNITY CENTER			

General Notes:

- Registered users have to be cardholders who have used their cards within the past three years.

What's changing:

- **Juvenile:** Do not include student program cards
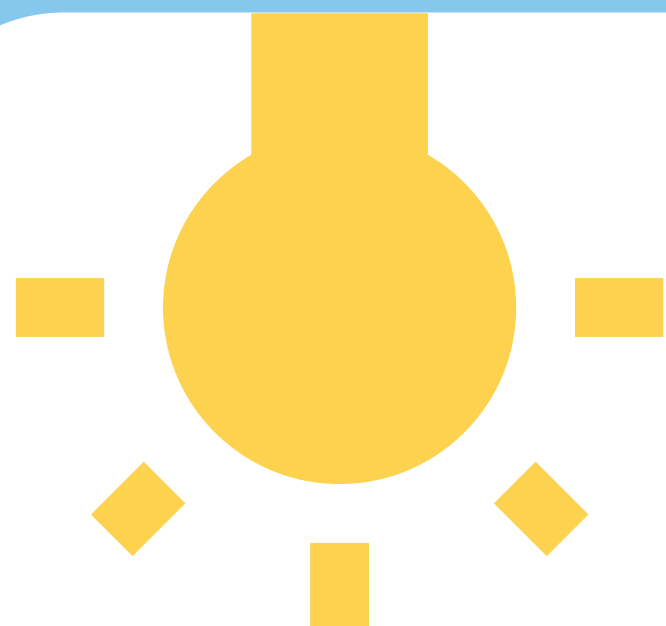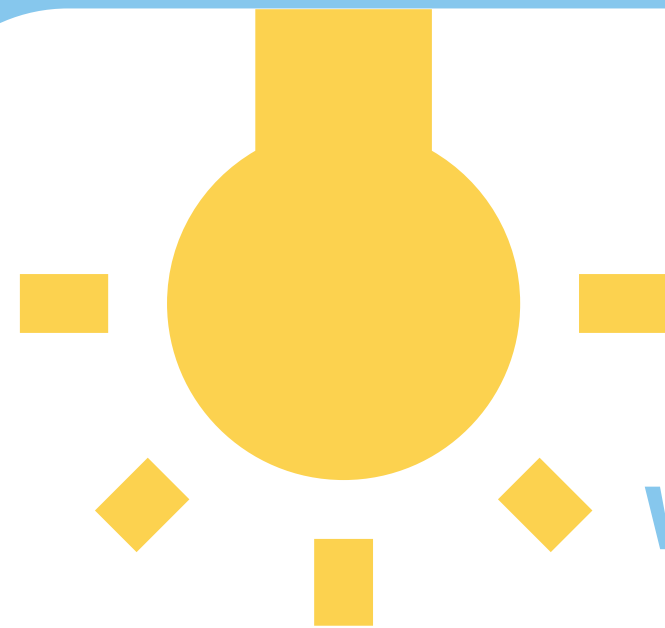
J. Programming

What is a program?

- Planned event
- Intended for group participation
- Sponsored or led by the library
- Program sessions may cover use of the library, library services, or library tours. Program sessions may also provide cultural, recreational, or educational information. Examples of these types of program sessions include, but are not limited to, film showings, lectures, story hours, literacy programs, citizenship classes, and book discussions.

What is NOT a program?

- A booth at a festival
- A library card sign-up table
- *Self-directed activities
- An event hosted and planned by another organization using a library meeting room
- One-on-one consultations
- Recorded presentations

Sample form:
https://forms.gle/Xi
FfD7CpuAL5M47R9

Self-directed Activities

What is a self-directed activity?

- An activity that library staff provide for patrons, typically for a limited time. Unlike traditional programming, it does not require direct staff interaction while the activity is being completed.
- Examples include take–home crafts, social media challenges or trivia, outdoor story walks, and other activities that the library provides resources for, but that the patron does independently.
- The activity reported on is that which requires a moderate amount of staff work to prepare and facilitate, beyond just leaving out photocopied coloring pages, puzzles or board games.

What is NOT a self-directed activity?

- Puzzles or coloring sheets on a table
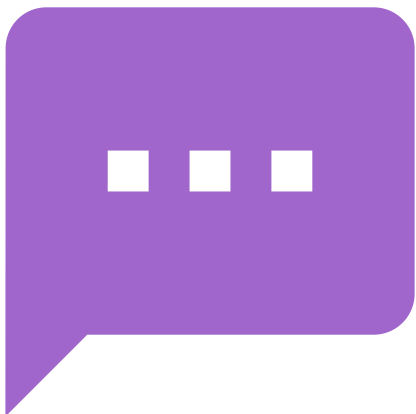- Handouts at a festival

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What is NOT a self-directed activity?

- Puzzles or coloring sheets on a table
- Handouts at a festival

K. Other Service Metrics

☐	K.1. All transactions (reference transactions)	📋	[____] 29,362 ☐N/A
☐	K.2. Method of data collection	📋	[_____ ▼]

Meeting room use

☐	K.3. Meeting Room Use	📋	[____] 172 ☐N/A
☐	K.4. Meeting Room Attendance	📋	[____] 1,860 ☐Unable to track

Interlibrary loans

Library materials, or copies of the materials, provided by one library to another upon request. The libraries involved in interlibrary loans are not under the same library administration; do not count "branch to branch" loans as interlibrary loans. You should count NC CARDINAL transactions.

☐	K.5. Interlibrary Loans Provided To	📋	[____] 170
☐	K.6. Interlibrary Loans Received From	📋	[____] 552

Partnerships

Please designate which type of partnership you have with each of the following types of organizations.

Communicative: Library and partners communicate information about each other's programs, services, and/or resources by distributing promotional materials, giving referrals, setting up displays, making presentations, etc.

Cooperative: Library and partners provide mutual assistance in working toward a common goal by sponsoring activities, donating incentives, recruiting volunteers, etc.

Collaborative: Library and partners work together by sharing staff, resources, and/or costs.

K.7. K-12 Schools	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.8. Higher Education Organization(s)	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.9. Local Employment Office	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.10. Local Health & Human Services Department	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.11. Local Parks & Recreation Department	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.12. Other Local Government Department(s)	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.13. Economic Department Organization(s) (i.e. Chamber of Commerce)	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.14. Local Business(es)	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.15. Local Health Organization(s)	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.16. Local Faith Organization(s)	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.17. Local Agricultural or Environmental Organization(s)	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.18. Other local organization(s) focused on youth	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A
K.19. Other local organization(s) focused on adults	📋 ○ Communicative ○ Cooperative ○ Collaborative ○ N/A

L. Technology

L. ELECTRONIC TECHNOLOGY

Computers

Location	L.1. Internet terminals used by staff only	L.2. Internet Computers Used by General Public
MOBILE LIBRARY		
MAY MEMORIAL LIBRARY		
GRAHAM PUBLIC LIBRARY		
MEBANE PUBLIC LIBRARY		
NORTH PARK LIBRARY/COMMUNITY CENTER		

Users

Location	L.3. Uses of Public Internet Computers Per Year	L.4. Reporting Method for Number of Uses of Public Internet Computers Per Year
MOBILE LIBRARY		
MAY MEMORIAL LIBRARY		
GRAHAM PUBLIC LIBRARY		
MEBANE PUBLIC LIBRARY		
NORTH PARK LIBRARY/COMMUNITY CENTER		

Users

☐	L.5. Website Visits	181,911	--Select--
☐	L.6. Wireless Internet Sessions	24,382 ☐ Unable to track	
☐	L.7. Reporting Method for Wireless Sessions		Annual Count

M. Outlets

Notes:

- Information in the outlet section is used for the North Carolina Public Library Directory
- More pre-filled data
- Bookmobiles need a square footage of -3
- M.32. Unexpected closures should be used for natural disasters, emergency repairs, etc.

Examples of Certifications & Check values

Check Values:

Key ratios that help identify outlier data. Examples:

- Circulation per cardholder
- Attendance per program
- Computer use per open hour

Library Visits

Location	I.5. Library Visits	I.6. Method of data collection: visits	Visits per open hour
MOBILE LIBRARY			
MAY MEMORIAL LIBRARY			
GRAHAM PUBLIC LIBRARY			
MEBANE PUBLIC LIBRARY			
NORTH PARK LIBRARY/COMMUNITY CENTER			

Certifications:

Check boxes certifying data has been accurately report. For example:

- I certify that the income reported reflects funds received by the library during the time period of July 1, 2023- June 30, 2024.
- I certify that personnel have been reported using the full-time equivalency formula and includes all budgeted positions that are filled, vacant or temporary.

Tracking PLS Metrics

Sampling:

Aim for a quarterly sample, choosing a typical week*. Sum the total of the four weeks and multiple by 13 to get the 52 week total.

*A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or in the library. Choose a week in which the library is open its regular hours.

Sampling is appropriate for:
- Reference Transactions
- Library Visits
- Computer usage

General Reminders

-1 or 0: -1 denotes that data exists but is unknown; 0 means the service wasn't offered or there were no users

June 30: All point in time data should be as of June 30. Examples include collection counts, personnel counts, cardholders.

Leave annotations: If anything unusual happened (i.e. receiving a large donation, having multiple staff on leave, natural disaster) leave notes about the impact. If an edit is flagged do not write "Correct".

Ask Questions and be curious!

Announcements

PLA Benchmark

- Includes PLS, NCES, PLA and community data
- Must commit to participating in 2025 PLA Topical Survey
- Access expected to be available in late summer/early fall 2025

Analyze trends in expenditures, staffing, collections, services, and other data.

Illustrate ongoing activities and usage in a compelling fashion for different audiences.

Generate key metrics for strategic planning, budget justifications, annual reports, fundraising, and more.
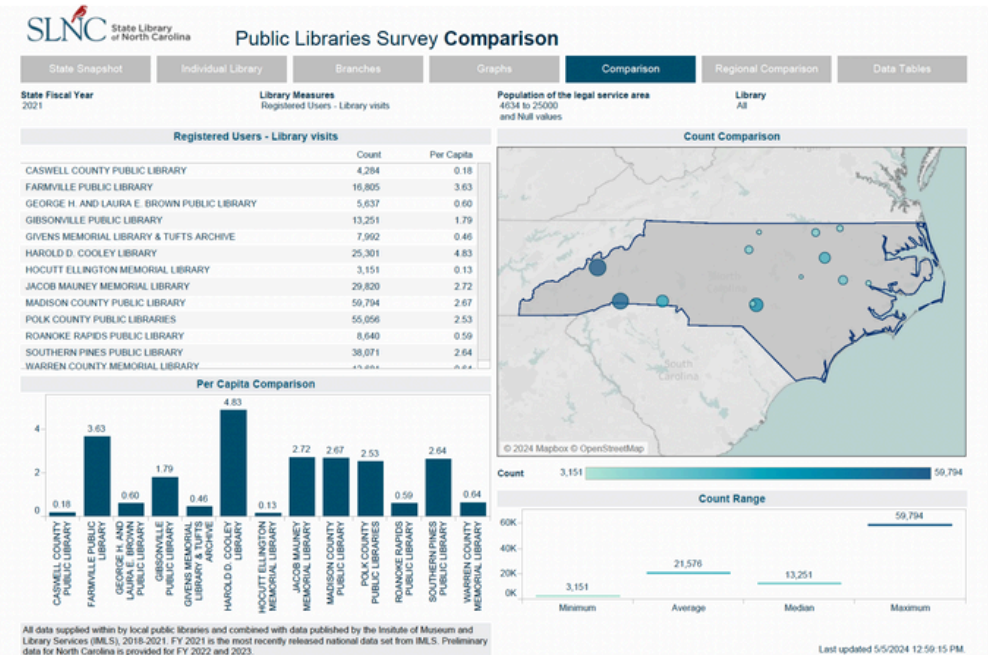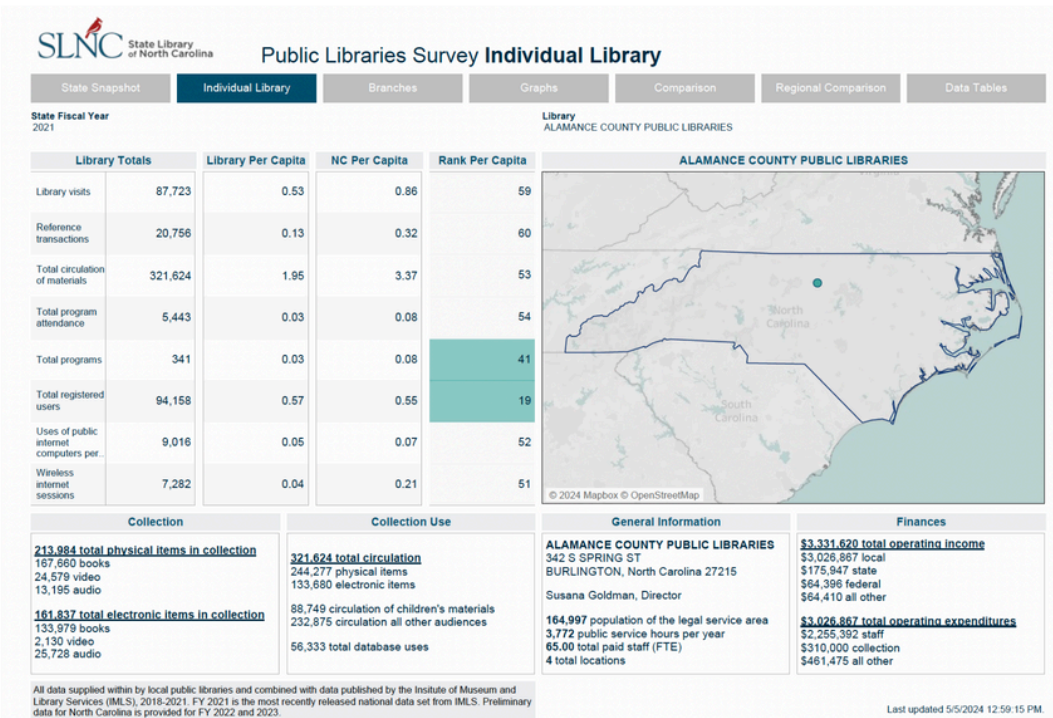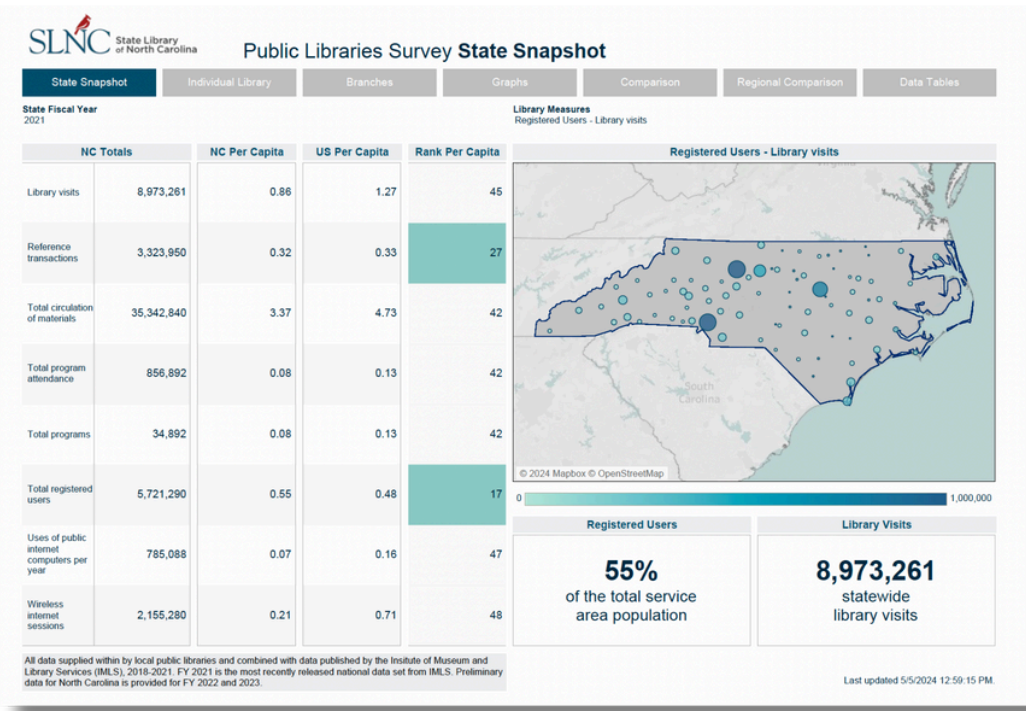
Contribute your library's data to national surveys to further research and advocacy.

Announcements

Dashboards
Coming fall 2025

QUESTIONS

Contact me:

amanda.johnson@dncr.nc.gov

Book a virtual meeting: