

# THE PUBLIC LIBRARIES SURVEY

## Welcome!

Please introduce yourself in the chat:

- Name
- Library
- Years involved with survey

# Hello!



## Amanda Johnson

Data Analysis & Communication Consultant

[amanda.johnson@dncr.nc.gov](mailto:amanda.johnson@dncr.nc.gov)



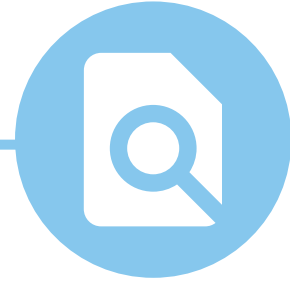
[SLNC Data Webpage](#)

# How can I help you?



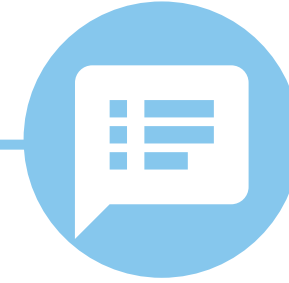
## Public Libraries Survey

- 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.



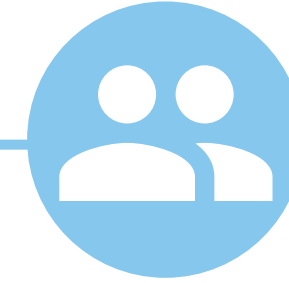
## Evaluation Plans

- 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 (coming soon)
- Gale Analytics (sunsetting Oct. 2024)

# Hello!

Lauren Clossey

Continuing Education Consultant



# 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

INSTITUTE of Museum and Library SERVICES | Public Libraries Survey Web Portal Fiscal Year 2022 | OMB No. 3137-0074 Expires 11/30/2024

Input Data: State Char page | Home | Survey Status | Tools | Reports | Help

SUB MENU | USER OPTIONS | DATA ELEMENT DEFINITIONS: STATE CHAR

State Characteristics			
ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
100	Reporting Period Start Date (MM/YYYY)	07/2021	07/2020
101	Reporting Period End Date (MM/YYYY)	06/2022	06/2021
102	State Total Population Estimate	10,487,088	10,487,088
103	Total Unduplicated Population of Legal Service Areas	10,487,088	10,487,088

PRINT PAGE | SAVE



Welcome State Library of North Carolina

Public Library Survey | Standards Survey (OPTIONAL) | Non-recurring SFRF State Aid

**Public Library Statistics** (click here to view past submissions)

FY 22 Public Library Survey Documentation

Instructions

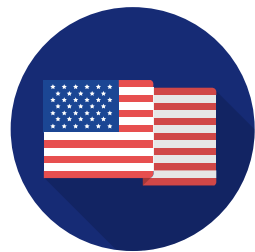
- FY22 Instructions
- FY22 Excel file
- Determining how to count virtual programs guide
- Platform specific guide for virtual programming

The background features a light blue gradient. On the right side, there are several overlapping geometric shapes: a dark blue triangle pointing down, a purple triangle pointing up, a white hexagon, and another dark blue triangle pointing up. The text is positioned on the left side of the image.

**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

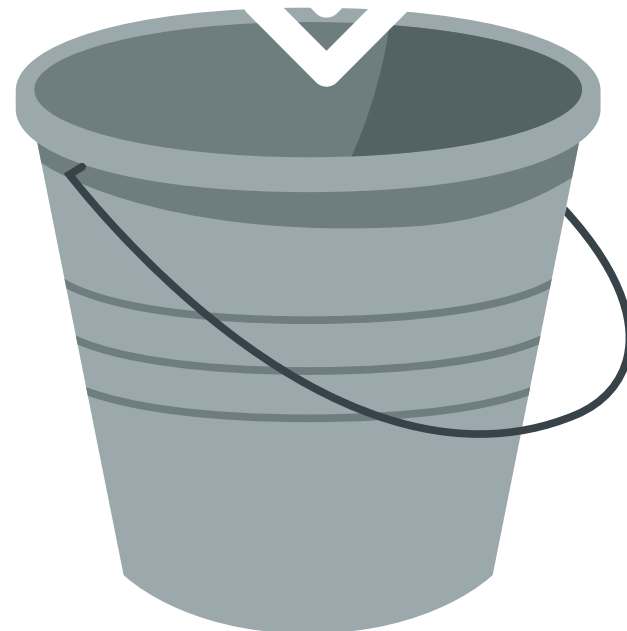
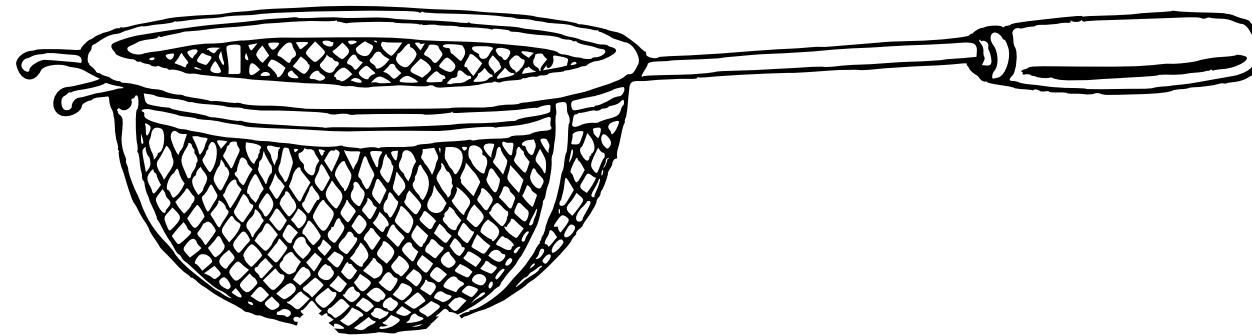
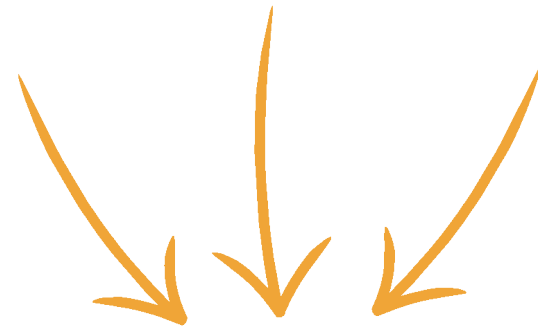


State Level



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?**

# **Part 2:** **The Public Libraries Survey in North Carolina**

**a.k.a. Annual Statistical Report**



# Yearly Cycle



## July 2024

- FY24 survey opens on July 15 for the reporting for July 1, 2023-June 30, 2024
- LibPAS input training will be on July 18 at 2pm

Register:



## August 2024

- FY24 survey remains open

## September 2024

- FY24 Survey closes on September 16, 2024
- Review of FY24 data begins

## October 2024

- IMLS releases FY25 data elements that passed state vote.
- Review of FY25 data continues

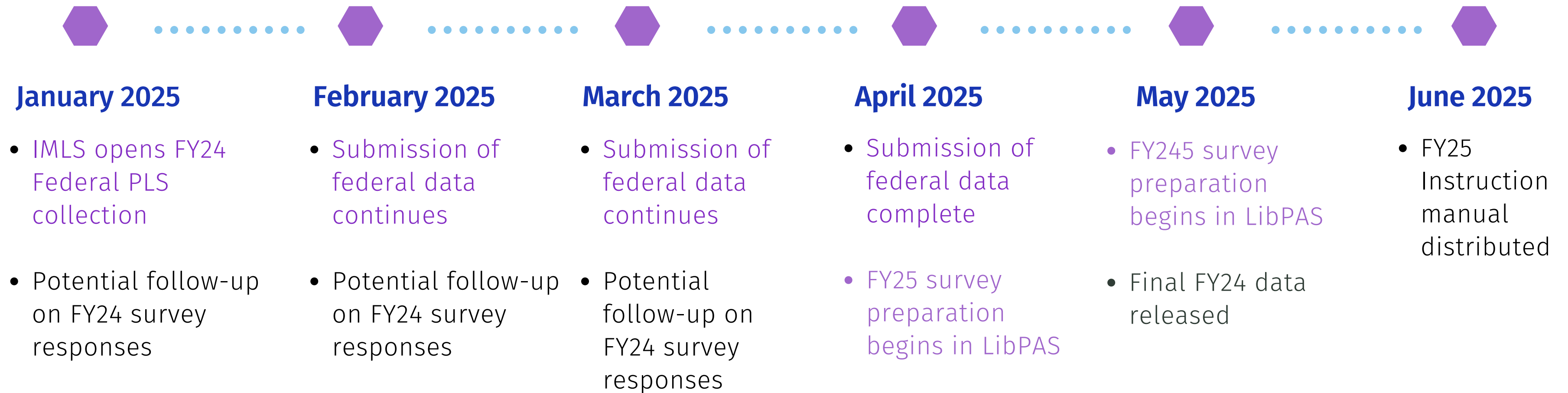
## November 2024

- Review of FY24 data wraps up
- Development of draft FY24 tables begins

## December 2024

- FY24 preliminary data released.

# Yearly Cycle



# 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 18 at 2pm. Register:**



Welcome State Library of North Carolina

[Public Library Survey](#) [Standards Survey \(OPTIONAL\)](#) [Non-recurring SFRF State Aid](#)

**Public Library Statistics** (click here to view past submissions)

FY23 Public Library Survey Documentation

- [FY23 Draft Instructions](#)
- [FY23 Excel file \(coming soon\)](#)
- [Determining how to count virtual programs guide](#)
- [Platform specific guide for virtual programming](#)

Prefill Data Status:

State Income (State Aid, SFRF, GEER):

LSTA Grant Income:

NC Cardinal:

NC Live:

NC Kids:

e-iNC:

NCDL:

Training and Resources:

[LibPAS data Input Instructions](#)

[Recorded webinar: LibPAS Reports \(FY21\)](#)

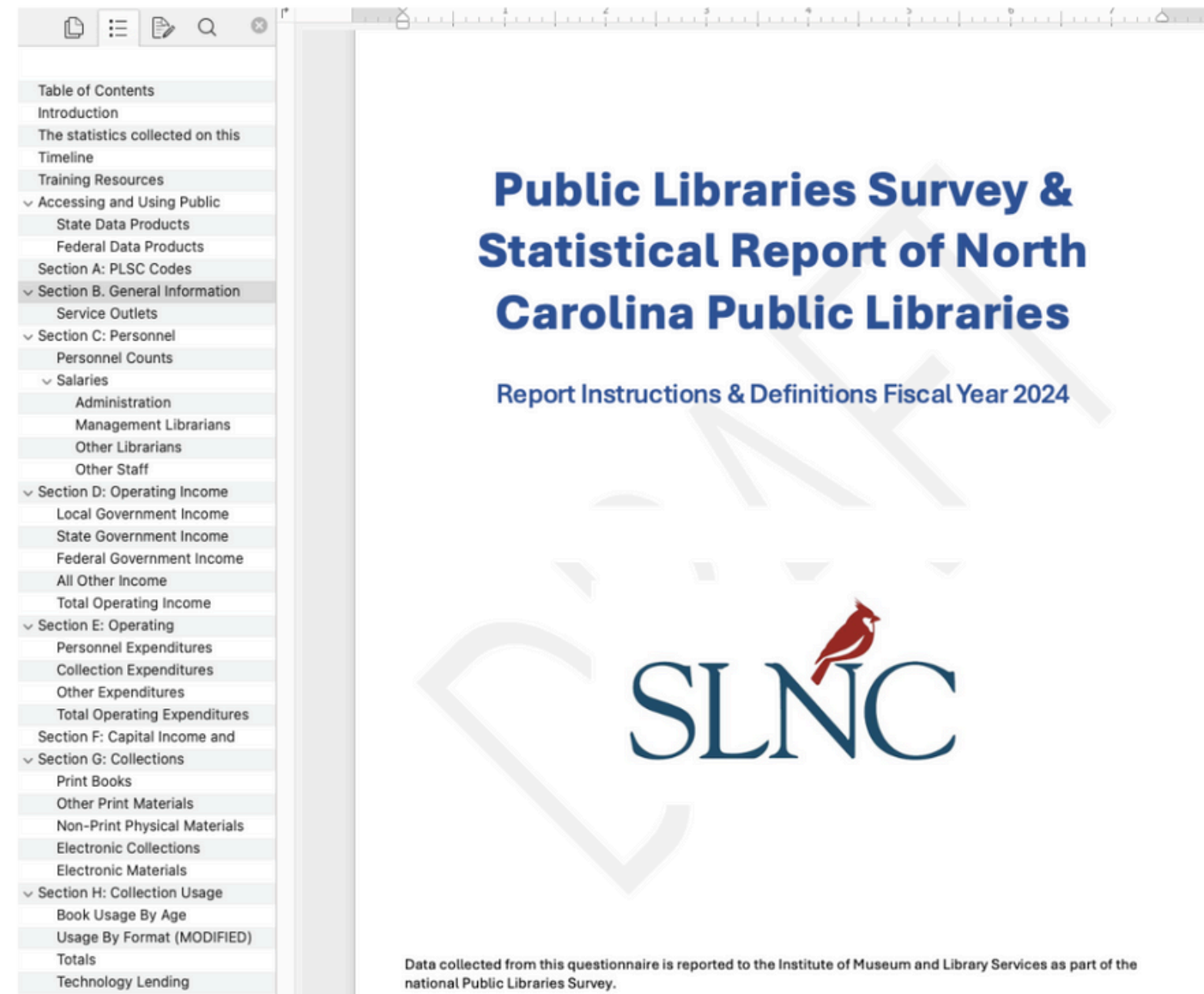
[LibPAS Reports Instructions](#)

# Instruction Guide

Draft instructions are available now on our website. A final version will be available when the survey opens on July 15, 2024.



**Note:** Select View in top ribbon - > Navigation pane



# Instruction Guide

## 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
- Appendix with all modifications
- Internal notes section
- Formatted to be printed and shared - sections separated by page breaks

### Section C: Personnel

#### How to determine which positions to include:

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

#### Determining how to categorize staff:

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.

#### Calculating the number of positions:

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. ( $2 \times 38/40 = 1.9$ )

#### Personnel Counts

Number	Indicator	Definition	Internal Notes
C.1.	FTE Librarians with MLS accredited by ALA	Paid librarians with a master's degree from programs of library and information studies accredited by ALA. Graduates whose library schools received accreditation within five years after their graduation should be included in this count ("grandfathered in").	
C.2.	FTE Librarians with MLS not accredited by ALA	Paid librarians with a master's degree from programs of library and information studies not accredited by ALA but having North Carolina Public Librarian Certification.	
C.3.	Total Librarians	This is calculated for you by the State Library. FTE Librarians with MLS accredited by ALA + FTE Librarians with MLS not accredited by ALA.	
C.4.	FTE all Other Paid Staff	Report all other employees paid from the reporting unit budget including plant operations, security, and maintenance staff.	
C.5.	Total Paid Employees	This is calculated for you by the State Library. Total Librarians + FTE all Other Paid Staff.	
C.6.	Volunteer hours	Report the number of hours worked by library volunteers this year.	



# 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 FY24

# Summary of Modifications

- IMLS pilot project to transition specific system level data elements to the location level.
- Clarification to Electronic Expenditures, Asynchronous Events, and Patron Assistance definitions
- Simplification of electronic item definitions (e-book, e-audio, e-video) and broadened scope of access
- Narrowing of Children's Circulation definition
- Addition of facilities, friends, and foundation elements
- Addition of certifications\*
- Addition of ratio and auto-calculated check values\*

# 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.	
<input type="checkbox"/> A.1. FSCS KEY (WebPLUS Identification Number)	NC0103
<input type="checkbox"/> A.2. LIB ID (State Assigned Identification Number)	C-ALAMANCE
<input type="checkbox"/> A.3. Interlibrary Relationship Code	Not a Member of a System, Federation or Cooperative Service. ▾
<input type="checkbox"/> A.4. Legal Basis Code	County/Parish ▾
<input type="checkbox"/> A.5. Administrative Structure Code	Administrative entity with Multiple Direct Service Outlets where ▾
<input type="checkbox"/> A.6. FSCS Public Library Definition	Yes ▾
<input type="checkbox"/> A.7. Geographic Code	County (exactly) ▾
<input type="checkbox"/> A.8. Legal Service Area Boundary Change	No ▾
<input type="checkbox"/> 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

## B. GENERAL INFORMATION

### Mailing Address

If the mailing address has changed since last year, contact Amanda Johnson, Amanda.johnson@dnc.nc.gov.

B.1. Mailing Address	B.2. Mailing City	B.3. Mailing ZIP Code	B.4. Mailing ZIP+4 Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> N/A

### Street Address

If the physical street address has changed since last year, contact Amanda Johnson, amanda.johnson@dnc.nc.gov.

B.5. Physical Street Address	B.6. City	B.7. ZIP Code	B.8. ZIP+4 Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> N/A

### Contact

B.9. Legal Name	<input type="text"/>
B.10. Economic tier	<input type="text"/> 2
B.11. Library type	<input type="text"/>
B.12. County	<input type="text"/>
B.13. Library Director	<input type="text"/>
B.14. Phone	<input type="text"/>
B.15. Email Address	<input type="text"/>
B.16. Data Coordinator (staff completing the form)	<input type="text"/>
B.17. Title	<input type="text"/>
B.18. Phone Number	<input type="text"/>
B.19. Email Address	<input type="text"/>
B.20. Web Address	<input type="text"/>
B.21. Does the library have a Foundation that supports systemwide operations?	<input type="radio"/> Yes, a 501c3 registered Foundation <input type="radio"/> Yes, a Foundation that is not a registered 501c3 <input type="radio"/> No, the library system does not have a Foundation
B.22. Does the library have a friends group that supports systemwide operations?	<input type="radio"/> Yes, a 501c3 registered Friends Group <input type="radio"/> Yes, a Friends Group that is not a registered 501c3 <input type="radio"/> No, the library system does not have a systemwide Friends Group

### Service Outlets

B.23. Number of Central Libraries	B.24. Number of Branch Libraries	B.25. Number of Bookmobiles	B.26. Number of Other Mobile Units	B.27. Number of Kiosks	Total # of Service Outlets
<input type="text"/> 73	<input type="text"/> 321	<input type="text"/> 26	<input type="text"/> 59	<input type="text"/> 20	<input type="text"/> 420 499

### Service Hours

Public Service hours are calculated automatically from the hours entered for each outlet in Section M.

B.28. Public Service Hours Per Year	<input type="text"/> 0 985,303
-------------------------------------	--------------------------------

## 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. ( $2 \times 38/40 = 1.9$ )

<input type="checkbox"/>	C.1. FTE Librarians with MLS accredited by ALA	<input type="text"/>	839.23
<input type="checkbox"/>	C.2. FTE Librarians with MLS not accredited by ALA	<input type="text"/>	46.11
<input type="checkbox"/>	C.3. Total Librarians	<input type="text"/>	0.00 885.34
<input type="checkbox"/>	C.4. FTE all other paid staff	<input type="text"/>	2,424.18
<input type="checkbox"/>	C.5. Total Paid Employees	<input type="text"/>	0.00 3,309.52
<input type="checkbox"/>	C.6. Volunteer hours	<input type="text"/>	153,235 <input type="checkbox"/> 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
<input type="text"/> \$89,346	<input type="text"/> <input type="checkbox"/> N/A	<input type="text"/> <input type="checkbox"/> N/A	<input type="text"/> 2,515,365 <input type="checkbox"/> Not applicable	<input type="text"/> \$1,525,286

## Notes:

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

# 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	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MAY MEMORIAL LIBRARY	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
GRAHAM PUBLIC LIBRARY	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MEBANE PUBLIC LIBRARY	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>

### Non-Fiction

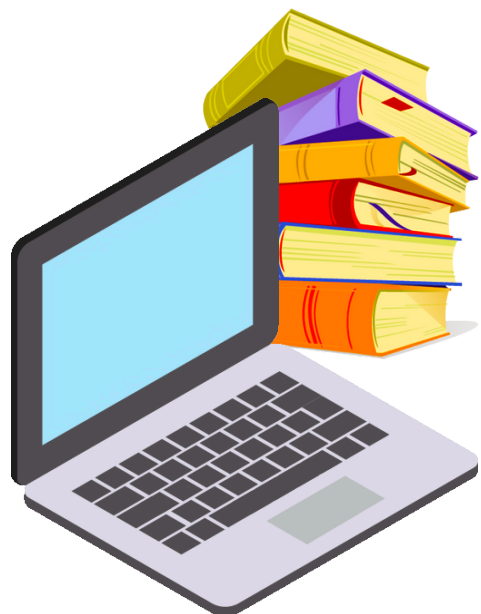
Location		G.4. Cataloged Adult Non-fiction Books	G.5. Cataloged Young Adult Non-fiction Books	G.6. Cataloged Juvenile Non-fiction Books
MOBILE LIBRARY	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MAY MEMORIAL LIBRARY	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
GRAHAM PUBLIC LIBRARY	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MEBANE PUBLIC LIBRARY	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>

### 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	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MAY MEMORIAL LIBRARY	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
GRAHAM PUBLIC LIBRARY	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MEBANE PUBLIC LIBRARY	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### 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	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MAY MEMORIAL LIBRARY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
GRAHAM PUBLIC LIBRARY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MEBANE PUBLIC LIBRARY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>





# G. Collections

## Electronic Collections

### What's changing?

- Modified definitions for:
  - **E-book:** E-books are the digital equivalent of printed books that may be accessed online from an electronic device. E-books also include e-comics.
  - **E-audio:** E-audio are digital files of sound only (e.g., audiobooks, music) that may be accessed online from an electronic device.
  - **E-video:** E-videos are digital files of moving visual images (e.g., movies, television shows) with or without sound that may be accessed online from an electronic device.
  - **E-serial:** E-serials are periodic digital publications equivalent to printed newspapers, magazines, and similar media that are viewed as entire issues rather than as single articles returned from a research query.
- Addition of **G.19 Research databases:** Did the administrative entity provide access to research databases purchased solely by the administrative entity?"
- Addition of **G. 20. Learning Platforms:** "Did the administrative entity provide access to online learning platforms purchased solely by the administrative entity?"

# 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	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MAY MEMORIAL LIBRARY	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
GRAHAM PUBLIC LIBRARY	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MEBANE PUBLIC LIBRARY	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>

#### 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	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MAY MEMORIAL LIBRARY	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
GRAHAM PUBLIC LIBRARY	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
MEBANE PUBLIC LIBRARY	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	Non-Fiction	<input type="text"/>	<input type="text"/> <input type="checkbox"/> ILS cannot provide this data	<input type="text"/>

#### Total

Location		H.7. Total Adult Book Circulation	H.8. Total Young Adult Book Circulation	H.9. Total Juvenile Book Circulation
MOBILE LIBRARY	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
MAY MEMORIAL LIBRARY	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
GRAHAM PUBLIC LIBRARY	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
MEBANE PUBLIC LIBRARY	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	Total	<input type="text"/>	<input type="text"/>	<input type="text"/>



# H. Circulation

## Electronic Circulation

### What's Changing?

- Same modified definitions as in Collection Counts for: E-book, E-audio, E-video, E-serial
- **H.41-43. Retrieval of Electronic Information:** modified to remove language about downloading
- **H. 50. Children's Circulation:** modified to exclude children's materials



### Circulation:

- Pre-filled NCDL & eINC usage includes ALL usage including unshared Advantage titles



# 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.

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

### Library Visits

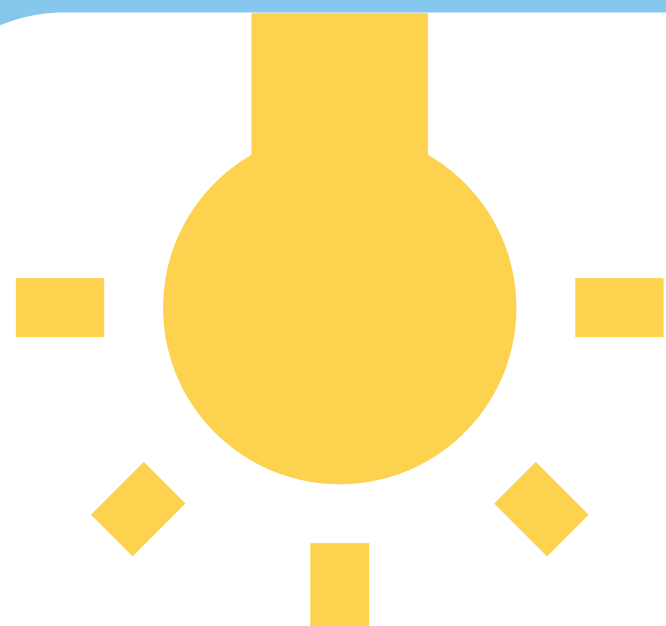
Location	I.5. Library Visits	I.6. Method of data collection: visits	Visits per open hour
MOBILE LIBRARY	<input type="text"/>	<input type="text"/>	<input type="text"/>
MAY MEMORIAL LIBRARY	<input type="text"/>	<input type="text"/>	<input type="text"/>
GRAHAM PUBLIC LIBRARY	<input type="text"/>	<input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

## General Notes:

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

## What's changing:

- I.5 Library Visits** will be asked for by location



# J. Programming

## What is a program?

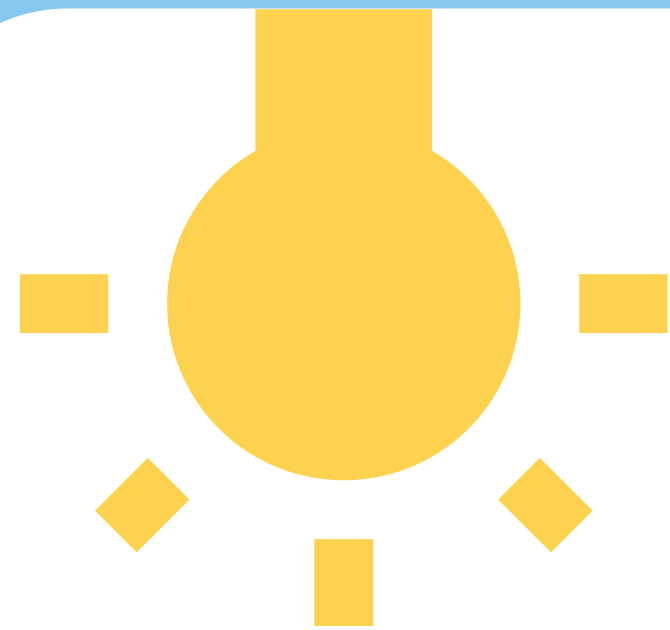
- Planned event
- Intended for group participation
- Sponsored or led by the library
- Program sessions may cover use of the library, library services, or library tours. Program sessions may also provide cultural, recreational, or educational information. Examples of these types of program sessions include, 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/XiFfD7CpuAL5M47R9>

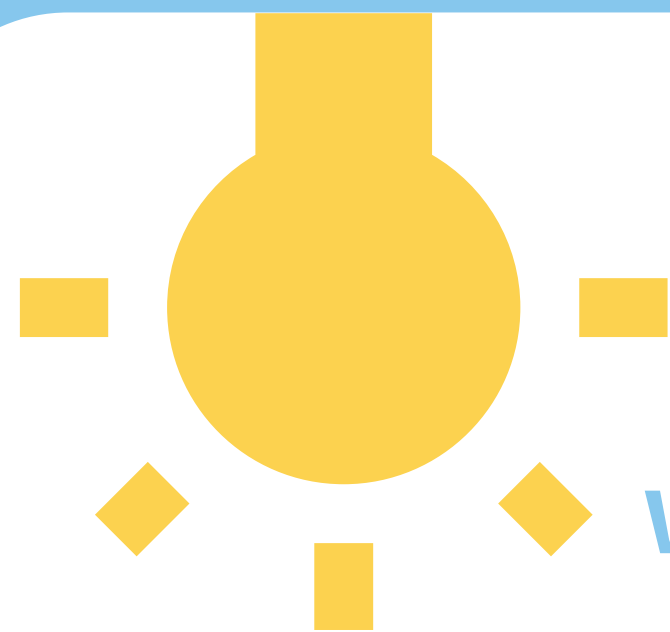




# J. Programming

## What's changing?

- Expanded definition of Asynchronous events to explicitly include audio only recordings such as podcasts
  - **J.43. Total number of asynchronous Program Presentations**
  - **J.44. Program Presentation views within 30 days**



# 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



## What's changing:

- **K.1. Patron Assistance** modified for clarity: Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs. Reference transactions do not include formal instruction or exchanges that provide assistance with library locations, schedules, equipment, supplies, or policy statements.
  - NOTES:
    - (1) A reference transaction includes information and referral service, scheduled and unscheduled individual instruction and assistance in using information sources (including websites and computer-assisted instruction).
    - (2) Do not include transactions that include only a directional service.

# 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	<input type="text"/>	<input type="text"/>
MAY MEMORIAL LIBRARY	<input type="text"/>	<input type="text"/>
GRAHAM PUBLIC LIBRARY	<input type="text"/>	<input type="text"/>
MEBANE PUBLIC LIBRARY	<input type="text"/>	<input type="text"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	<input type="text"/>	<input type="text"/>

### 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	<input type="text"/>	<input type="text" value="--Select--"/>
MAY MEMORIAL LIBRARY	<input type="text"/>	<input type="text" value="--Select--"/>
GRAHAM PUBLIC LIBRARY	<input type="text"/>	<input type="text" value="--Select--"/>
MEBANE PUBLIC LIBRARY	<input type="text"/>	<input type="text" value="--Select--"/>
NORTH PARK LIBRARY/COMMUNITY CENTER	<input type="text"/>	<input type="text" value="--Select--"/>

### Users

<input type="checkbox"/>	L.5. Website Visits	<input type="text" value="181,911"/> <input type="text" value="--Select--"/>
<input type="checkbox"/>	L.6. Wireless Internet Sessions	<input type="text" value="24,382"/> <input type="checkbox"/> Unable to track
<input type="checkbox"/>	L.7. Reporting Method for Wireless Sessions	<input type="text" value="--Select--"/> Annual Count



# M. Outlets



## Notes:

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

# M. Outlets

Facilities							
Location	M.2. Owned or Leased	Year built	Year of last remodel	Condition of the facility	Facility Upgrade Needs	Number of reservable meeting spaces available for public use	Number of reservable small group spaces available for public use
MOBILE LIBRARY	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> n/a	<input type="text"/> <input type="checkbox"/> n/a
MAY MEMORIAL LIBRARY	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> n/a	<input type="text"/> <input type="checkbox"/> n/a
GRAHAM PUBLIC LIBRARY	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> n/a	<input type="text"/> <input type="checkbox"/> n/a
MEBANE PUBLIC LIBRARY	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> n/a	<input type="text"/> <input type="checkbox"/> n/a
NORTH PARK LIBRARY/COMMUNITY CENTER	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> n/a	<input type="text"/> <input type="checkbox"/> n/a

## What's Changing:


- Addition of Foundations & Friends groups that support specific locations
- Addition of Facilities
  - Status/condition of the facility
  - Meeting spaces

# 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



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

## 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 have participated in 2022, 2023 PLA survey or commit to participating in 2024 Staff Survey
- Access expected to be available in late summer/early fall 2024



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.

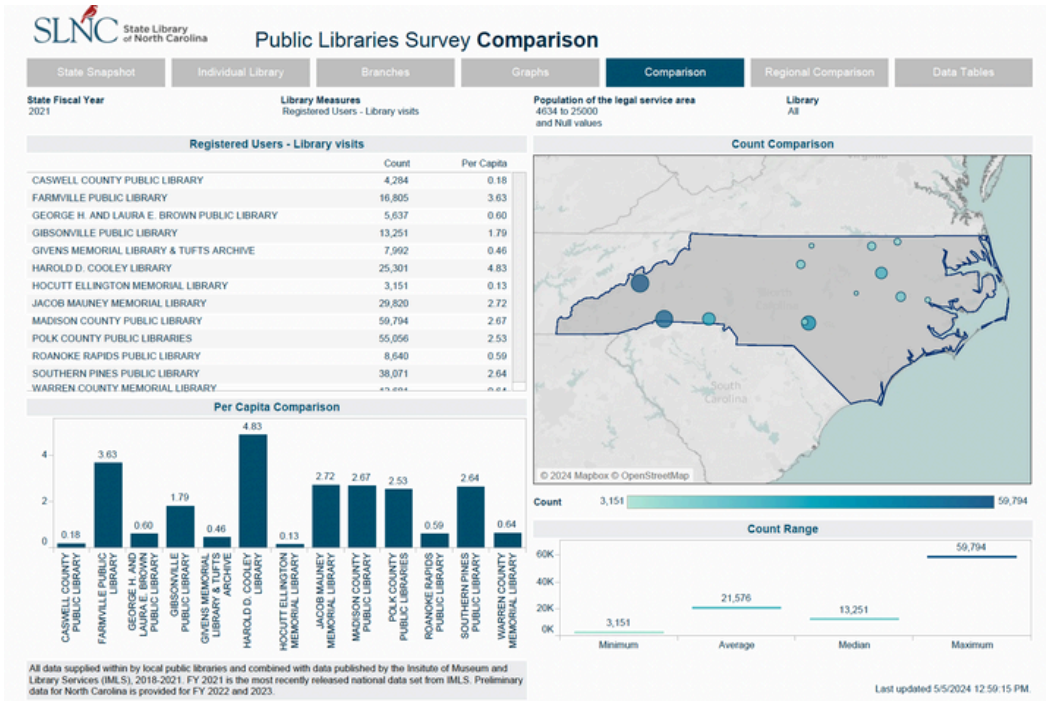
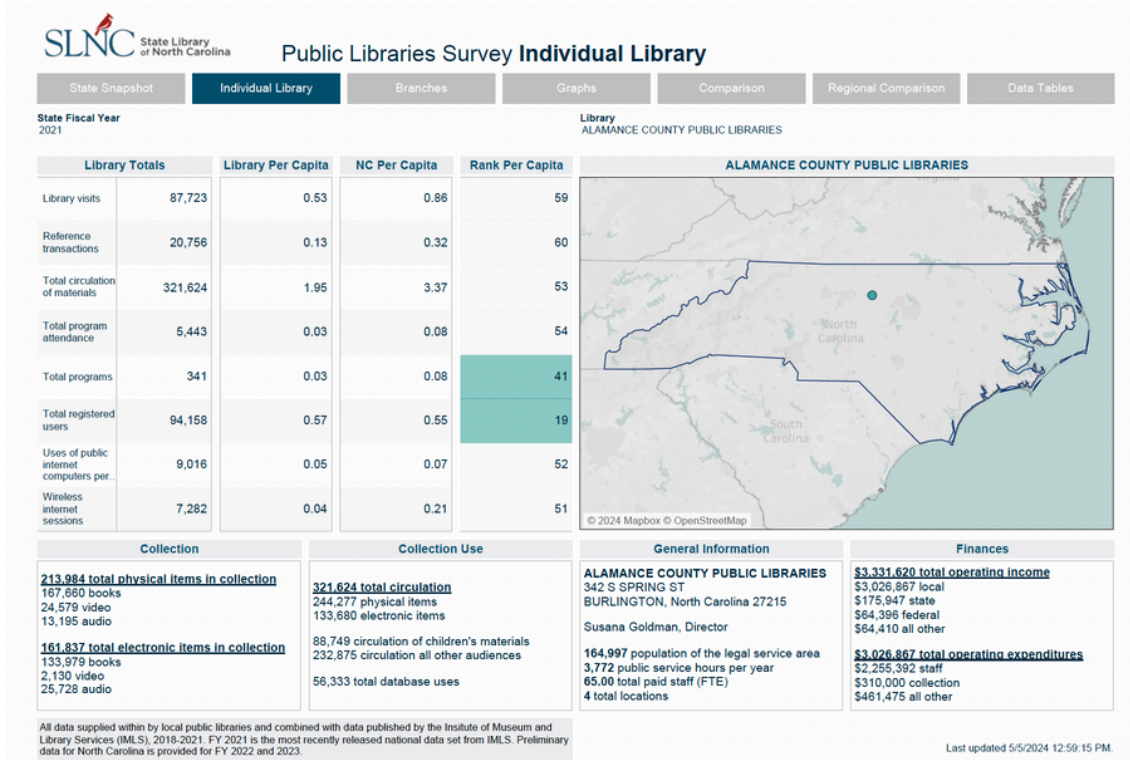
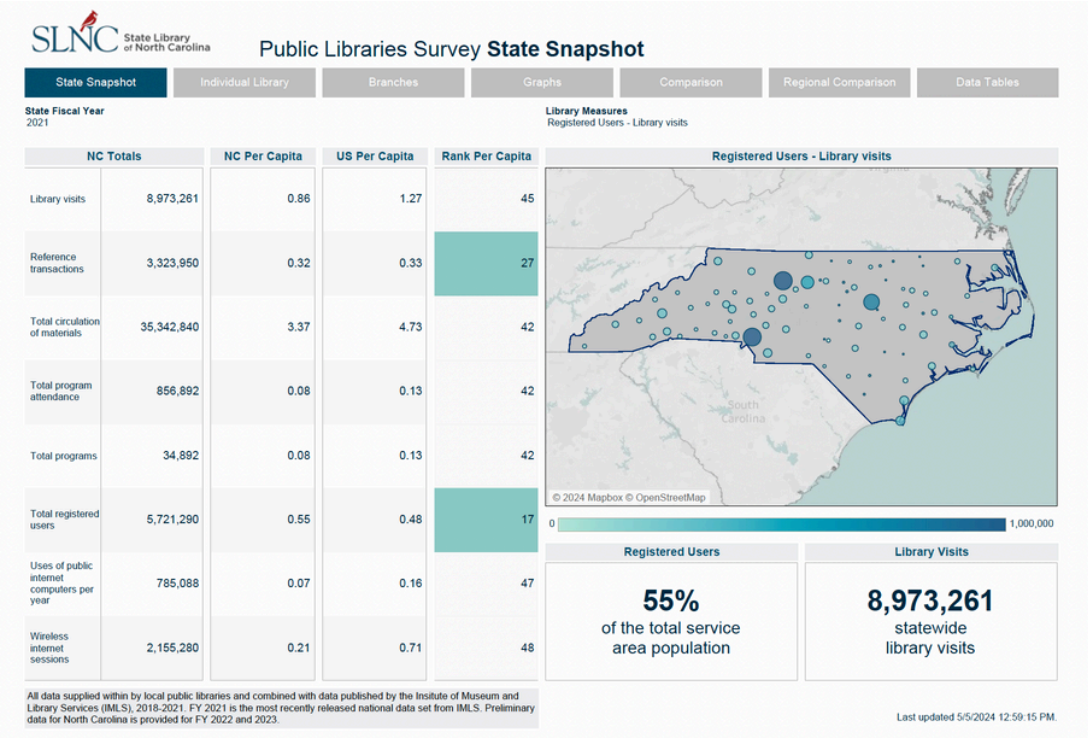


Contribute your library's data to national surveys to further research and advocacy.

# Announcements

## Dashboards

Coming fall 2024



# QUESTIONS

Contact me:

[amanda.johnson@dncr.nc.gov](mailto:amanda.johnson@dncr.nc.gov)

**Book a meeting during PLS office hours:**

July 15 - Sept.13

Tuesdays 9-11am

Thursdays 1-3pm



<https://outlook.office365.com/bookwithme/user/5be89cc679da4cb5b41ae3bafeebd6cb@dncr.nc.gov?anonymous&ep=plink>

