

REPORT

Measures that Matter Action Plan Step 2.1

A Review of State Public Library Survey Data Elements

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Executive Summary of Key Insights

The Measures that Matter Action Plan Step 2.1 aims to provide insight into the areas of similarity and divergence across state public library surveys (“PLS”).

To achieve these objectives, Ithaka S+R created an inventory of all state added data elements to the IMLS Public Libraries Survey (“IMLS PLS”) and conducted semi-structured interviews with nine state data coordinators and two vendors of survey management platforms. The following key insights include the most notable findings detailed in this report.

Key Insights

- On average, states add 180 additional data elements beyond the 102 provided by IMLS. The greatest number of additional data elements incorporated was 633, and the least amount of additional data elements incorporated was 7.
- There is substantial commonality across the items that states are adding to their surveys; the greatest share of data elements included by states concern operating expenditures, human resources, services, governance, and operating revenues.
- Many of the state-added items are components of data elements within the IMLS PLS. Approximately 21% of state-added elements contribute directly to calculations for data elements within the IMLS PLS.
- Of the state data coordinators interviewed, most have not made substantial changes to their state’s PLS instrument within the last five years, and currently have an informal process in place for making such changes to their survey.
- At a local level, state PLS data can be used for benchmarking, funding opportunities, assessment of staff training and library programming, as well as potentially fostering collaboration between libraries and/or schools; however, the interviewed state data coordinators mentioned that the degree to which libraries can make decisions for change depends on a library system’s staffing capacity and financial resources.

Introduction

Measures that Matter (MtM) is a cooperative project, jointly led by the Institute of Museum and Library Services (IMLS) and the Chief Officers of State Library Agencies (COSLA), “to address short- and long-term challenges to public library data collection and use. The initiative engage[s] a wide variety of stakeholders from within the public library field and outside of it. Collectively, stakeholders discussed the need for public library data collection tools to support library operations, programs, resources and services. There was also widespread recognition of the need for data to demonstrate the value of public libraries in the United States.”¹ Ithaka S+R implemented Action Step 2.1 of the MtM project.

Intentions behind Action Step 2.1 are to identify the added data elements within an individual state’s Public Library Survey (“PLS”), to provide insight into recurring content areas across state surveys, and to recommend the addition and/or amelioration of existing data elements within the IMLS PLS. Additionally, this report examines the data collection efforts of state data coordinators to identify behaviors and attitudes surrounding their data collection and analysis processes. Based on the identification of additional state data elements to the PLS and the testimonials of an array of state data coordinators and relevant vendors, recommendations are provided for the inclusion of frequently occurring data elements to the core IMLS PLS questionnaire. A categorized inventory of every state-added data element across the United States was also created as part of MtM Action Step 2.1.²

The PLS is an annual survey conducted by every state and territory in the United States, including the District of Columbia, and is completed by an administrative entity.³ Each State Library includes 102 data elements provided by IMLS, referred to henceforth in this report as the “IMLS PLS,” to which the administrative entities respond each year. These 102 data elements concern the physical location of the administrative entities and their outlets, finances, library collections, circulation, as well as services, technology, and programs. As data collection and reporting efforts of the IMLS PLS are already annually implemented by State Library Agencies, states take this national reporting opportunity to incorporate inquiries of their own into the IMLS PLS to reduce the participation burden for administrative entity respondents. The term “state-added data elements to

¹ Kendall Wiggin; Jennifer Nelson; Stacey Aldrich; Matt Birnbaum; Timothy Cherubini; Robin Dale; Kurt Kiefer; and Annie Norman, “Measures that Matter Action Plan,” IMLS and COSLA, April 2018, https://measuresthatmatter.net/wp-content/uploads/2018/05/MTM-Action_Plan-2018-Final.pdf.

² Hawaii and the District of Columbia were not included in the analysis due to the unique format of their PLS.

³ “Administrative entity” is defined according to the IMLS definition: “This is the agency that is legally established under local or state law to provide public library service to the population of a local jurisdiction. The administrative entity may have a single outlet, or it may have more than one outlet.”

the PLS” will refer to the data elements added by a State Library Agency to the IMLS PLS; the state’s complete survey containing both IMLS PLS and the state-added data elements to the PLS will henceforth in this report be referred to as a “state’s PLS”. An inventory of the IMLS PLS and corresponding state-added data elements has been compiled and the elements therein have been thematically analyzed.

Methodology

MtM Action Step 2.1 was designed to identify (1) data elements added by the states and administered concurrently with the IMLS PLS, (2) the frequently occurring content areas of these additional data elements, and (3) perspectives on why the additional data elements were included and how they are being used, organized, and implemented. To identify these additional data elements, an inventory was created containing every state-added data element to the IMLS PLS. This inventory was subsequently analyzed using an iterative, thematic coding process.

A total of 49 states make up the population for the Action Step 2.1 project.⁴ Each state submitted the 2017 version of their state’s PLS to Ithaca S+R for analysis. These surveys were then compared to the 2016 version of the IMLS PLS to identify state-added data elements.⁵ A total of 8,837 state-added data elements were identified across each of the 49 state surveys.

State-added data elements were then compiled into an inventory and subsequently thematically analyzed using an iterative, grounded theory approach in which items were categorized according to a coding scheme developed specifically for this project. Thematic coding of the additional data elements enabled us to quantify the most prevalent questions asked across states. State-added data elements were categorized thematically with an overarching high level category and with a corresponding subcategory to provide additional context.⁶ In total, 15 high level categories were identified, and 67 subcategories were identified and analyzed across the high level categories.

State-added data elements that did not fit into one of the named high level categories were categorized into an “Other” high level category. If a state-added data element could

⁴ Hawaii and the District of Columbia were not included in the analysis due to the unique format of their PLS. Hawaii uses their own method of data collection on a library’s collections, programs, and services, and uses their own accountant to report on financial data elements to IMLS. The District of Columbia does not include any additional data elements within their PLS. The U.S. territories of American Samoa, Guam, Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands were also not included in the analysis.

⁵ No changes were made between the 2016 and 2017 versions of the IMLS PLS.

⁶ See Appendix D: Codebook for definitions and examples of high level categories and subcategories.

be categorized into a high level category, but not into a specific subcategory, it was also categorized into an “Other” subcategory. Due to the broad nature of these “Other” high level categories and subcategories, their analysis has been excluded from this report. For more information on state-added data elements with an “Other” high level category or subcategory, see the Inventory for State-Added Data Elements to the IMLS PLS.

Semi-structured interviews were also conducted with nine State Data Coordinators (SDC) to better understand their perspectives on the IMLS PLS, their state-added data elements to the IMLS PLS, and their various survey administration and data collection methods. Separate conversations were conducted with representatives from two vendors of survey management platforms, Counting Opinions and Baker & Taylor, in order to gain a broader perspective on PLS administration, as well as attitudes surrounding the IMLS PLS and its use across states.

For additional information on the methodology associated with this project, see Appendix A: Methodology.

State-Added Elements and the IMLS PLS

Each State Library includes 102 data elements provided by IMLS within their state's annual PLS. These 102 data elements span a wide range of topics and are general in nature (i.e. "Print Materials" within a library's collections), yet some states are interested in more specific information on these topics (i.e. "Adult Fiction" within a library's collections). On average, states add 180 additional data elements to the IMLS PLS for their state's PLS. Across all states, 8,837 state-added data elements have been identified, and approximately 21% of these state-added elements contribute directly to calculations for data elements within the IMLS PLS.

For instance, while the IMLS PLS does not request information concerning the amount of adult programming a library offers, it does ask for the total number of library programs. Forty-one states added a data element requesting the amount of adult programs their administrative entities and associated outlets offer; library respondents may already have this information to answer the IMLS PLS data element querying the total amount of programs. Additionally, the majority of state libraries use vendors with survey management products that create automatic totals based on entered data. These automatic calculations may sum to a required data element by the IMLS PLS, such as the total number of library programs, reducing participation burden.

Thematic Analysis of State-Added Elements

Every state-added data element was coded at two levels: The high level category, which describes the overarching thematic area of focus of the question and a subcategory to provide another level of context and meaning to the high level category. To see an overview of the high level categories, see Table 1 below. For an overview of the high level categories and subcategories, see Appendix B: High Level Category and Subcategory Assignment. The following section discusses the high level categories identified and their most prevalent subcategories.

High Level Category	Number of Data Elements	Overall Percentage
Operating Expenditures	1,596	18.06%
Human Resources	1,007	11.40%
Services	997	11.28%
Governance	950	10.75%
Operating Revenues	892	10.09%
Programs	697	7.89%
Library Collections	665	7.53%
Associated Outlet Information	580	6.56%
Technological Resources and Devices	378	4.28%
Other	227	2.57%
Identification	231	2.61%
Capital	202	2.29%
Survey Feedback	201	2.27%
Bookmobiles	124	1.40%
State Characteristics	90	1.02%

Table 1. Frequency of high level categories. *N* = 8837.

Finances and Human Resources

State-added data elements concerning financial resources, revenues, and expenditures are highly prevalent in each state's PLS: about 18% of state-added data elements were associated with Operating Expenditures, followed by 10% with Operating Revenues, and 2% with Capital (including both capital expenditures and revenue). Additionally, state-added data elements relating to operating revenues and expenditures were most frequently identified as components of an IMLS PLS data element. Approximately 11% of state-added data elements align with Human Resources inquiries, and concern the library director's contact information, the amount of time staff work, an administrative entity staff's education level, as well as volunteer information.

High Level Category	Frequency	Definition	Most Frequent Subcategories
Operating Expenditures	18.06%	Items pertaining to the current and recurrent costs necessary to support the provision of library services. Expenses by the library in the fiscal year being measured from its regular budget and from all other sources, and supported by expenditure documents. Does not include capital expenditures; this is included under Capital. Includes all salary and benefit information.	Staff Salary Staff Benefits Total
Human Resources	11.40%	Items pertaining to staffing of the library system, including information on the library director. Does not include any salary or benefit information; these are included under Operating Expenditures.	Education Level Director Information Staff Hours Worked
Operating Revenues	10.09%	Items pertaining to money or money equivalents received in an accounting period and used for salaries and wages, the costs of library materials and services, and other operating expenditures. Does not include capital revenue; this is included under Capital.	Local State Federal
Capital	2.29%	Items pertaining to both capital revenue (to be used for capital expenditures) and capital expenditures (the acquisition of or additions to fixed assets).	--

Capital

Of the many finance-based state-added data elements, most concern operating expenditures and revenues; very few (approximately 2%) of overall state-added data

elements were associated with capital expenditures and revenues. Thirty states included one or more additional data elements on this topic. Within the data elements provided by IMLS, five data elements regard capital revenues, with only one data element on capital expenditures. As such, capital expenditures and capital revenues were collapsed into one category. No subcategories were assigned to this high level category due to the relatively small amount of state-added data elements and the high level of similarity across the content of these state-added data elements. Some examples of state-added capital-related data elements include “Furniture and Other Equipment,” “Building Expenditures,” and “Total Capital Revenue from Grants.”

Operating Expenditures

Approximately 18% of state-added data elements were associated with operating expenditures-related content, making it the most prevalent added data element across states.

These state-added data elements predominately concern salary and benefits: 28% correspond to staff salaries, and 12% to staff benefits. Staff salary data elements include various topics related to entry-level salaries (e.g. “Beginning salary for branch librarian”), hourly rates (e.g. “ALA-MLS hourly rate”), and current salaries of specific positions (e.g. “Head of Interlibrary Loan: Current Annual Salary”). State-added data elements regarding staff benefits include questions about specific funds devoted to benefits (e.g. “Federal funds used for salary benefits”), as well as information regarding what types of benefits staff receive (e.g. “Number of sick days”). Approximately 6% of operating expenditures state-added data elements correspond to director salaries (e.g. “Regional Director: Salary”), and 2% to director benefits (e.g. “Director: Health Insurance”).

About 12% of operating expenditure state-added data elements correspond to a specific total operating expenditure other than what is requested within data elements provided by IMLS (e.g. Total Program Costs, a state-added data element not explicitly requested by the IMLS PLS). If a data element contained the word “total” or represented a total calculation, it was considered a total operating expenditure state-added data element.

Approximately 24% of state-added, operating expenditure data elements are a component of an IMLS PLS data element. For instance, one state breaks down employee salaries and wages expenditures into four questions, requesting specifically a library’s local, state, federal, and other sources of funds for salary and wages expenditures.

Operating Revenues

Overall, about 10% of the total amount of state-added data elements align with operating revenues. Thirty-four percent of these concern local revenue related inquiries, 14% concern state revenue inquiries, and 12% relate to federal revenue inquiries.

Approximately 48% of these state-added, operating revenue-related data elements are a component of a data element within the IMLS PLS. For instance, one state breaks down the IMLS PLS data element of Local Government Revenue into three questions, asking specifically for a library's local city, county, and district funds. The remaining state-added, operating revenue data elements are unrelated to the totals requested in the IMLS PLS, such as one state asking for the "Amount of state aid grant received in the previous fiscal year," or the "Operating income from the summer youth employment program."

Human Resources

State-added data elements regarding human resources were the second most prevalent type of state-added query, with about 11% aligning with this topic. While the IMLS PLS asks for the number of full-time equivalent (FTE) paid staff, State Library Agencies are requesting more in-depth information regarding a staff member's education level, hours worked, and contact information, as well as similar information regarding volunteers.

Twenty-three percent of these questions concern the education level of staff members. States have added data elements including "Certification level," "Number of Senior Librarians holding a BLS," and "Highest education level achieved by Head Librarian" in addition to the IMLS PLS required information on the number of personnel they currently have in a specific position.

States are also particularly interested in information regarding the library director(s) at individual public libraries and administrative entities. About 18% of human resources-related state-added data elements are about the library director, including the director's name, email address, their physical address, among other important identifying information.

About 9% of state-added human resources data elements concern volunteers. States have added these data elements to account for the portion of their staff that are not working for a salary, which specific positions are filled by volunteers (e.g. "Is the Director a Volunteer?"), as well as variations on how much time volunteers have spent working in a particular role at their library (e.g. "Annual volunteer hours," and "Total number of volunteer hours"). Twenty-nine states added at least one data element to their PLS regarding volunteers.

Lastly, states are particularly interested in the amount of hours paid staff are working. Approximately 14% of human resources-related state-added data elements concern staff hours worked, with about 2% concerning a director’s hours. Some of these state-added data elements are part of a calculation that helps to determine the overall FTE for a particular subsection of personnel. For instance, one state asks for “Hours worked per week by paid staff with MLS from a non-ALA accredited program.” While the IMLS PLS does not ask for FTE personnel with an MLS from a non-accredited program, it does ask for the FTE of total librarians. This state-added data element contributes to that total, helping the library account for those particular individuals as part of the sum.

Services

The IMLS PLS as well as state-added data elements ask a large share of questions surrounding the service-based functions of an administrative entity, such as interlibrary loan, reference transactions, and programming, as well as technological resources and devices like computers and Wi-Fi. The following section discusses the most prevalent state-added data elements regarding the services and amenities provided by an administrative entity.

High Level Category	Frequency	Definition	Most Frequent Subcategories
Services	11.28%	Items pertaining to services offered by the library, excluding library programs, which are included under Programs.	Circulation
			Hours of Operation
			Registered Users
Programs	7.89%	Items pertaining to any planned events that introduce the group attending to any of the broad range of library services or activities, or which directly provide information to participants.	Summer Reading
			Attendance: Other
			Adult Programs
Technological Resources and Devices	4.28%	Items pertaining only to the number and/or use of electronic products, hardware, and software. Also includes items pertaining to the library’s internet usage, website information (excluding the web address), online catalogs, and integrated library systems. Does not include any expenditure or revenue information (see Operating Expenditures and Operating Revenues), nor information on patron borrowing (see Library Collections).	Wi-Fi/ Connectivity
			Integrated Library Systems (ILS)
			Public Computers

Services

Services state-added data elements were the third most prevalent topic overall, with about 11% of the total state-added data elements aligning with this subject.

Approximately 42% of these service-based inquiries were circulation-based.

Additionally, approximately 56% of these circulation-based state-added data elements are components of IMLS PLS data elements. For example, although the IMLS PLS asks for the circulation of children’s materials specifically, one state asks for this to be broken down between two data elements: circulation of “Children’s fiction books,” and circulation of “Children’s non-fiction books.”

About 30% of service-based state-added data elements concern the hours of operation of an administrative entity.⁷ Thirty-three states have added data elements around opening and closing times stratified by the days of the week and by season. For example, one state has one data element for the opening and closing times for each day of the week (e.g. “Sunday: Open” and “Sunday: Close”). Some ask for summer and winter hours (e.g. “Summer Hours: Thursday-Opening Time” and “Summer Hours: Thursday-Closing Time).” These data elements may add up to a total number of hours per week, per month, or per year.

State library Agencies are also particularly interested in the amount of and different kinds of registered users. Approximately 6% of state-added data elements on services concern registered users. While the IMLS PLS does ask for the amount of registered users an administrative entity has had over the past year, some State Library Agencies want more detailed information. Some ask about the amount of specific borrowers within the last year (e.g. “Registered Users-Nonresident” and “Number of registered users who have borrowed materials in the last year”), while others ask about when the registration files have last been purged (e.g. “Have the Registration Files Been Purged in the Last Three Years?”).

Programs

About 8% of the overall state-added data elements relate to programming, with a large share concerning summer reading programs (27%), adult programs (9%), and digital literacy programs (6%). State Library Agencies are also interested in the attendance at library program offerings: about 14% of state-added data elements on programs ask about attendance at different types of programs and about 7% specifically ask about adult attendance.

⁷ State-added data elements regarding hours of operation for a bookmobiles or associated outlets would be coded within the Bookmobile or Associated Outlet Information high level categories respectively.

The IMLS PLS only asks about programming for children, young adults, and the total amount offered at an administrative entity, but does not specifically ask about adult programming. A total of 41 states include at least one data element regarding adult programs within their state-added data elements, and about 9% of programming state-added data elements concern adult programs (not including questions about adult attendance at those programs). Thirty-seven states include at least one data element on adult attendance; approximately 7% of programming state-added data elements strictly concern adult attendance at programs.

Data elements within the IMLS PLS do not specify the type of content offered through programs (i.e. literacy-related programs, education-based programs, career-based programs, etc.). State Library Agencies correspondingly add data elements about specific programs. About 27% of state-added data elements on programs concern summer reading specifically, followed by 6% on digital literacy.

The data elements regarding summer reading include registration (e.g. “Number of children registered for the year’s Summer Library Program”), attendance (e.g. “Total attendees at events for birth to grade 5 programs”), and number of hours read (e.g. “Number of Hours Read (teens)”), among other questions. The data elements around digital literacy include whether these programs were offered at all (e.g. “Do you offer computer training?”), and how much time is spent providing these types of programs (e.g. “Approximately how many hours of computer training classes does your library district offer to the public each month?”).

In addition to asking whether or not, and to what extent, different types of programs are offered, State Library Agencies are also interested in how many people attended these programs. Approximately 14% of state-added data elements on programming concern attendance⁸, with 29 states adding data elements on this topic.

Technological Resources and Devices

About 4% of state-added data elements concern the technological resources and devices offered by a library. Approximately 18% of these data elements focused on Wi-Fi and connectivity. State-added data elements ask about Wi-Fi availability in general (e.g. “Does your library have internet access?” and “Type of internet connection”).

⁸ State-added data elements concerning the attendance at summer reading, STEM, digital literacy, GED programs, and career/employment-related programs, or any state-added data elements concerning adult attendance, are not included within this percentage, as state-added data elements concerning these topics are included within their own subcategories.

About 15% of state-added data elements on technological resources concern Integrated Library Systems (ILS), 13% relate to public computers, 10% to internet speed, 9% to website information, and 6% to internet filters and staff computers. Twenty-six states ask about the automation of the catalog (e.g. “Is your library’s catalog automated?”) and what vendor they use (e.g. “ILS Vendor”), among other relevant information regarding an ILS (e.g. “Do you offer a remote catalog?”).

While the IMLS PLS does ask about the number of computers used by the general public, 21 states include additional data elements regarding what *kinds* of computers are available to the public. For example, some states ask about stationary and mobile internet computers and devices (e.g. “Public Internet Stationary Computers,” “Public Internet Mobile Devices for On-Site Use”), while others ask about their typical use (e.g. “How many times per day can a patron use a public internet computer?”). Fewer states (15) include data elements regarding their staff computers, a content area not included within the IMLS PLS. State-added data elements concerning staff computers ask about the total number of computers available for use by the staff (e.g. “Total Staff Terminals”) and those that have or do not have internet access (e.g. “Staff Use Only with internet”).

Governance

About 11% of all state-added data elements align with governance topics,⁹ with a total of 44 states including at least one data element on this topic. The majority of state-added data elements involve Boards of Trustees (53%), followed by policies/planning (25%), partnerships (9%), and Friends Group (7%).

State-added data elements concerning Boards of Trustees and Friends Groups contain similar questions. Many states request the contact information of board and friends group members (e.g. “Board Member’s Name,” “Mailing Address”). Additionally, states request the length of a board or friends group member’s term, their term limits, as well as information on board meetings (e.g. “Number of regularly scheduled board meetings attended”).

The state-added data elements on policies and planning topics vary widely by state. Some ask about strategic planning (e.g. “Was your strategic plan reviewed internally within the past year?”), disaster plans (e.g. “Does the library have a disaster plan?”), and other plans and policies that are relevant to that state (e.g. “Meeting room policy,” “Technologies’ acceptable use policy,” “Board ethics policy,” etc.). Many of these questions do not require the administrative entity to create or submit their plans and/or

⁹ Defined as “Items pertaining to the administration or authority within the administrative entity. Does not include any salary or benefit information; these are included under Operating Expenditures.”

policies, but merely to designate whether they have them or not, or if they have been reviewed recently.

Administrative Entity and Outlets Information

About half of the data elements within the IMLS PLS request general information on the administrative entity and its outlets such as contact, population, district, and area information. About 46 states include at least one additional data element requesting more information on the state’s characteristics for the administrative entity’s district, as well as other identification information, while 35 states include additional data elements requesting additional information on an administrative entity’s outlets.¹⁰ The following section discusses the state-added data elements concerning additional important information regarding administrative entities and their associated outlets.

High Level Category	Frequency	Definition	Most Frequent Subcategories
Associated Outlet Information	6.56%	Items pertaining to the individual outlets within an administrative entity, specified by state-specific section headings. Includes individual addresses, state codes, collections, expenditures, programs, etc. Does not include any items regarding bookmobiles.	--
Identification	2.61%	Items pertaining to additional information on the administrative entity.	Web Address Fax Year Built/Renovation Hours of Operation
Bookmobiles	1.40%	All items pertaining to bookmobiles.	Vehicle Information Internet
State Characteristics	1.02%	Items pertaining to the population of the legal service area and/or characteristics that are area-specific (i.e. city specific items). Includes items regarding fiscal year.	--

¹⁰ An outlet, defined by IMLS, is a unit of an administrative entity that provides direct public library service, which refers to library branches, books-by-mail, and bookmobiles. Within this report, associated outlets include branches and books-by-mail programs, as bookmobiles are accounted for within its own high level category.

State Characteristics and Identification

Overall, approximately 3% of all state-added data elements regard identification information for an administrative entity, and about 1% regard a state's characteristics. Fifteen percent of these data elements request an administrative entity's web address, 14% ask for a fax number, and 10% ask for the year an administrative entity's headquarters was built or renovated.

Nineteen states request state-specific characteristic information such as "U.S. Congressional District," "Population 2010 census (taxes & served)," and "Government Unit under which library is legally established." It is important to note that some of these state-added data elements concerning state characteristics are pre-populated for the administrative entity by the State Library Agency to reduce participation burden.

Associated Outlet Information and Bookmobiles

About 7% of the overall state-added data elements were about associated outlets, while 1% were specifically regarding bookmobiles.

State-added data elements on associated outlets, including library branches, and books-by-mail programs, excluding bookmobiles, vary widely. For instance, multiple state-added data elements on outlets concern hours of operation (e.g. "Total Hours/Day-Monday"), internet access and connection (e.g. "Internet connection type for outlet's public access internet connection"), outlet identification (e.g. "Year built," "Fax Number," and "School District"), as well as programming (e.g. "Summer Teen Program Attendance") among other questions. While these types of state-added data elements do overlap with topics previously mentioned, any state-added data element that explicitly mentioned specific requests for outlet or bookmobile information was included within these categories.

There are only two data elements within the IMLS PLS regarding bookmobiles; both are on the number of bookmobiles within an administrative entity. However, 12 states added at least one data element regarding bookmobiles. Of the states that did request bookmobile information, 23% asked about hours of operation, 12% about vehicle information (e.g. "Vehicle Year, Make," Model"), 8% about internet (e.g. "Bookmobiles: with internet," "Bookmobiles: without internet"), and 4% about stops made by the bookmobile and the number of visits to the bookmobile itself.

Library Collections

Approximately 8% of all state-added data elements are on library collections.¹¹ Although the IMLS PLS does contain questions about library collections, all 49 states included within the inventory incorporated at least one additional data element around collections.

The most frequently occurring type of collection-based state-added data element regarded an administrative entity's total collections (12%), followed by materials added (10%), consortium (10%), databases/electronic serial collections (9%), e-books (6%), and materials removed (6%). These added data elements on total collections asked about specific types of materials in the library's entire collection that are not included within the IMLS PLS. For example, one state asks for "Total Audio," whereas the IMLS PLS asks for "Audio- Physical Units" and "Audio- Downloadable Units." There are also state-added data elements on totals of collections that are not explicitly asked in the IMLS PLS at all, such as "Total Children's Books," "Total Collection," and "Total Subscription."

The next most frequently occurring state-added data element on collections concerns the amount of materials added, such as "Books added during the calendar year" or "Juvenile Added." State libraries are less interested in how many materials were removed from a library's collections, as fewer state-added data elements concern the removal of materials.

The state-added data elements concerning consortia relate to the amount of materials acquired through a consortium (e.g. "Consortia Held E-Books," and "Total Consortia Electronic Materials"). No data elements regarding consortia are included within the IMLS PLS, and a total of 22 states ask at least one question regarding this topic. Regardless of its content, any state-added data elements specifically regarding consortia were grouped together.

The IMLS PLS does include data elements regarding electronic collections and asks for the "Local/Other, State, and Total Electronic Collections." However, 19 states add additional data elements regarding databases and electronic serial collections that are slightly different from and are more granular than what the IMLS PLS is currently requesting. For example, one state requests the "Downloadable Periodical Titles" and another requests the "Number of Library Materials in Electronic Format." Additionally,

¹¹ Defined as "Items pertaining to the physical and/or electronic collection of items that have been purchased, leased or licensed by the library, a consortium, the State Library, a donor, or other person or entity to be used for patron borrowing. Pertains primarily to items that are discoverable/managed within a library's online public catalog or Integrated Library System (ILS) that are available for patron borrowing. Does not include expenditures for library materials or subscriptions."

some states inquire regarding the usage of the databases or electronic collections (e.g. “State Database Usage Statistics”).

Survey Feedback

About 2% of the total state-added data elements relate to survey feedback.¹² Data elements on this topic are not included at all within the IMLS PLS. Forty states include at least one data element pertaining to survey feedback, including participant information (58%), collection method (14%), certification of data (11%), and comments (11%).

Participation information concerns the person completing the survey at the time of data entry. Examples include “Person completing this form,” “Respondent’s email address,” and “Telephone number of person completing the report.” Inquiries into collection methods request information regarding how a particular figure or metric was collected. For example, one state asked, “How did you collect this information?” following questions related to circulation. Another state asked “Method used to count library visits.”

State-added data elements related to the certification of data are comprised of statements certifying that the data provided are correct and accurate. These state-added data elements are typically found at the end of the state’s PLS as a conclusion to the survey before submission. State-added data elements requesting additional comments can also usually be found at the end of the survey, and are where respondents have the opportunity to answer questions such as “Are there any unique programs or services your library provided during the report period of which you would like to make us aware?” or “What successes have you had this year?” Some of the comments-based state-added data elements also give the administrative entity a chance to talk to the State Library directly, such as “Comments to Legislature on State Aid Value,” and “Are there programs, services, or ideas you would like the State Library to consider?”

¹² Defined as “Items pertaining to insights regarding the public library survey, any other comments on their fiscal year, and/or other state-specific qualitative/open-ended questions regarding the administrative entity’s data collection methods.”

Perspectives on State Public Library Surveys

Nine semi-structured interviews were conducted with State Data Coordinators (SDC)¹³ or equivalent positions from a wide array of states: Colorado, Georgia, Louisiana, Montana, New York, North Carolina, Ohio, Oregon, and Tennessee.¹⁴ Interviewees were selected by COSLA based on their previous experience with the IMLS PLS. COSLA provided Ithaka S+R with contact information for the interviewees and were subsequently interviewed by the authors. Each interviewee had various levels of experience in their current role with data collection, and working with their state's PLS.¹⁵ These SDCs were queried regarding their typical year of data collection for their annual state's PLS, how their state's PLS has changed over time, their processes for analysis and reporting, and their attitudes on the IMLS PLS.

Separately, conversations were conducted with representatives of Counting Opinions and Baker & Taylor's Bibliostat. Respondents were queried regarding their typical year of working with a SDC on their state's PLS, their services and products specifically for State Library agencies and for the PLS, their attitudes regarding the PLS data collection and reporting processes, and if they have observed any trends across the states' additional data elements. They were also asked how many State Library Agency customers currently use their platforms: Baker & Taylor currently serves 24 states, and Counting Opinions serves 25 states.¹⁶

State Data Coordinators

When asked to describe what a typical year of data collection and reporting looks like for their state, many interviewees provided similar responses. Individual administrative entities and outlets across their states collect data every month of the year. Depending on funding and size, their administrative entities may have someone on staff specifically dedicated to collecting and reporting these data for the IMLS PLS as well as for their own internal use, or have individuals in multiple departments collaborate to complete the survey. For smaller administrative entities, or for those with less funding, the library director, regardless of their experience with data collection or data entry, is typically the individual responsible for completing the survey.

¹³ Nine SDC representatives were interviewed out of approximately 56 SDCs in total.

¹⁴ For the complete interview scripts for both SDC and vendor, see Appendices E and F.

¹⁵ Interviewees had anywhere from one to ten years of experience in their current role. One respondent, while only in their role for two years, has been working with their state's PLS data for five years.

¹⁶ There is currently one state that does not use a vendor and whose SDC has developed their own system for their state's PLS administration, data collection, and reporting process.

The PLS process typically starts at the beginning of a state's fiscal year with the SDC preparing the survey for distribution to their administrative entities, making any changes required by IMLS along with updates from the preceding year. The content of a state's PLS does not change much from year to year; two SDCs indicated they have not made many significant additions, removals, or changes to the state-added data elements within their state's PLS. The remaining SDCs indicated only minor adjustments, particularly additions within the past five years on topics including bookmobiles, staff salaries, education level, and programming (e.g. summer reading programs). One SDC mentioned that they incorporated some of these additions to help them better understand the data currently being collected, while another mentioned they added more qualitative, open-ended data elements to collect interesting stories and create a narrative to share with their state's legislature. Salary information and staffing data elements appear to be increasing in importance as half of the interviewees indicated they have added questions regarding salary recently or are disseminating an entirely separate salary survey to their individual administrative entities.

The underlying process driving the addition, removal, and/or changes to data elements also varies from state to state. Two interviewees indicated their state has a committee to support data collection and analysis efforts and three indicated they receive support from their State Librarian or have others working in their office who assist with decision making. The remaining four SDCs indicated they work alone on their state's PLS. All interviewees describe the addition and removal process to their state's PLS as very informal, based on comments in the previous year's survey or feedback from library directors. The changes made to a state's PLS are often in service to the administrative entities and associated survey respondents to reduce confusion regarding the data elements, decrease time to complete the survey, and provide a standardized way to collect data on topics that are highly important to their needs.

Five SDCs indicated that a challenge to the data collection process is the potential for confusion or misinterpretation of the IMLS PLS and/or state-added data elements, as well as their corresponding definitions. High turnover, inexperience with data collection or entry, and lack of time and staffing were all cited as ways in which the definitions may be misconstrued or interpreted incorrectly, potentially leading to reporting inaccurate data. Although there are often checks for accuracy employed against a previous year's data, there are fewer ways to check to make sure the data reported were collected appropriately.

After distribution via email, administrative entities have between two to three months to enter the last fiscal year's data into their respective platforms (i.e. Counting Opinions, Baker & Taylor's Bibliostat, or via another method) and send them back to their State Library Agency. Once data are collected, checked for accuracy, and aggregated by the

SDC and vendor platforms, which may take a few months, the SDC submits their aggregated data to the American Institutes for Research (AIR).

Finally, depending on the state's resources and the SDC's role within their agency, the SDC may create and disseminate a report of findings, or a small figure or chart either within the report or separately, to their administrative entities to use for benchmarking, advertising, or pursuing funding opportunities. Seven interviewees said they release data from their PLS on their agency's website for the administrative entities to use independently. The remaining SDC has not been able to make their data available since 2016 due to understaffing and lack of time to prepare a finalized dataset or report. Additionally, two SDCs indicated they provide additional analysis and/or tables and infographics to their administrative entities on request. Once this process is completed, it is time to prepare for the next state PLS. According to the interviewees, this year-long process is relatively stable and does not change substantially from year to year.

When asked how results from their state's PLS inform decision making for their state's libraries, SDCs indicated that the use of the data depends on the system and their staffing and/or financial resources. For those that do use the data, SDCs indicated that most often the data are used for funding purposes, benchmarking against other libraries within their state, as well as assessments on trainings offered to staff and programs offered to the public. One SDC mentioned that the data could be used to foster collaboration between libraries, or between libraries and school systems.

The interviewees tend to have a favorable view of the IMLS PLS and find the federal data elements to be necessary and helpful. Most indicated that the data elements within the IMLS PLS would be included by the states regardless, as they are essential information that every library director should know about their administrative entity and outlet(s). As one SDC mentioned, the IMLS PLS is a "good jumping off point" for the states, as the states can then ask specific questions that speak to their unique needs, such as accreditation, continuing education credits, state aid, etc. Additionally, the interviewees believe that the IMLS PLS should be updated more frequently. For example, IMLS introduced a new data element in the 2018 version of their PLS -- website visits -- which is an item that some states have been requesting in their own PLS for a couple of years already. When considering who benefits the most from the results of their state's PLS, six SDCs said the results are in service directly to the individual libraries themselves, and three think it benefits the State Library Agency, therefore benefiting all libraries under their administration.

Survey Vendors

When asked to describe a typical year working with a state and their PLS, both vendors indicated that the process varies on a state-by-state basis. Once the survey is populated in the platform and is acceptable to the SDC, the survey is then distributed through the vendor's platform. Both vendors indicated that their company provides training via webinar to SDCs when needed. One respondent indicated they use a "train the trainer solution," in which they train the SDC to use their survey platform so the SDC can then train library directors and other respondents to use their product. Both vendors have regularly scheduled bug fixes and updates to their products overall. Specific customization is also available for each state's instance of their product.

Vendors are in a unique position of observing the development of the IMLS PLS as well as state-added data elements over time. When asked if they have noticed any trends regarding what data elements states have added to the IMLS PLS, one vendor mentioned they noticed that many states asked about website visits before it was incorporated into the IMLS PLS in 2018. They have also noticed a number of changes to state-added data elements regarding library programming, including changes to the definitions attached to them.

One vendor cautioned that the data being reported might not be accurate because data elements left in the IMLS PLS or data elements previously added by the state might not be calculated correctly based on differing collection methods (i.e. specific circulation-based data elements), reducing comparability of the data. As noted above, SDCs also reported some concern over data accuracy due to collection efforts or misinterpretation of definitions. They emphasized that having a process in place for discovering emerging topics of interest, and removing irrelevant data elements, both within the IMLS PLS and the state-added data elements, is crucial for data accuracy, comparability, and usefulness.

One of the vendors suggested that providing more clarity and specific, step-by-step instructions to data collection methods for particular data elements – in addition to existing step-by-step instructions for data entry – may be a suitable way to reduce this potential error in reporting. Increased training of library directors and respondents in data collection methods is another possible way to reduce this potential error.

Recommendations

The following recommendations outline data elements that may be beneficial to incorporate into the IMLS PLS or a state's PLS given their frequency in the inventory and comments made by SDCs and vendors via interview. There are a number of ways these recommendations may be implemented that could possibly lead to greater standardization for data elements frequently appearing in the inventory. These implementation plans might include the following organizations and steps:

- » **IMLS** to incorporate a new optional section of data elements to the IMLS PLS
- » **Groups of State Library Agencies** to collaborate in developing standardized elements and definitions
- » **Individual State Library Agencies** to add new areas of inquiry to their state's public library survey, or refine existing areas of inquiry based on a review of elements of other states' surveys

Incorporate a short salary survey. Elements regarding operating expenditures were the most frequently occurring topic across all state-added data elements. The most frequent type of element on this topic concerned staff salaries, and seven SDCs indicated via interview that they have recently incorporated additional data elements within their state's PLS regarding salary and education level. This suggests that State Library Agencies and administrative entities are interested in acquiring information regarding the salaries of specific positions throughout the library system.

Include additional data elements concerning a library's website. State-added data elements frequently involve website information. Approximately 30 states incorporated an additional data element to the IMLS PLS asking for an administrative entity's web address, and 9% of state-added data elements on technological resources and devices concerned an administrative entity's website information. Additionally, a couple of SDCs indicated they had already incorporated the newly added IMLS PLS data element on website visits for some time. Incorporating data element additions regarding social media and mobile access inquiries would also be particularly beneficial as they may be increasingly relevant over time.

Inquire into specific categories within the library collection. Approximately 12% of collections-based, state-added data elements concern total collections, 9% databases/electronic serial collections, 6% e-books, 3% adult collections, 3% children's collections, and 2% young adult collections. State Library Agencies are also particularly interested in collections attained through consortia, as about 10% of collections-based, state-added data elements concerned consortia.

Inquire into the maintenance of the library's collection. About 10% of state-added data elements on collections were concerned with the materials added to a collection, and 6% were concerned with the materials removed from a collection. This indicates that while State Library Agencies are interested in specific collections held by their administrative entities, they are also interested in the maintenance of their holdings as well.

Include additional data elements regarding the governance of the administrative entity. State-added data elements regarding the governance of an administrative entity were among the most frequently occurring topics (11%). State's added data elements could include queries on the contact information for Board of Trustees and/or Friends Group members, as well as information regarding their term limits and meeting times.

Incorporate standardized data elements regarding circulation that are more streamlined as components of existing federal elements. The most frequently occurring, services-related, state-added data elements regarded circulation (42%). Although the IMLS PLS does include data elements on circulation, State Library Agencies are including data elements for specific circulations, such as "Adult Fiction Books," "Analog Audio Circulation," and "Adult Physical Item Circulation." More than half of circulation-based, state-added data elements are a component of an IMLS PLS data element, indicating that these state-added data elements may be incorporated into the IMLS PLS to aid the respondent in calculating a total circulation-based data element, and with little change at the local level.

Include adult, and perhaps additional types of programming. Adult programs and attendance are not currently included as a data element within the IMLS PLS. To rectify this, 41 states include at least one data element within their PLS regarding adult programming, and 37 states include at least one data element regarding attendance at those programs. Additionally, 42 states include at least one data element regarding other types of programming that is not included within the IMLS PLS. Incorporating data elements concerning specific types of programs, such as summer reading and digital literacy, among other types of programs, may be useful to include within a state's-added data elements due to their notable frequency in the inventory.

Expand data elements regarding internet and computer usage. State Library Agencies are interested in collecting data on various aspects of technology that are not yet incorporated within the current IMLS PLS. About 36% of technological resources and devices-related, state-added data elements concerned internet usage and connectivity, and 19% concerned physical computers within an administrative entity and its outlet(s). A total of 38 states included at least one data element regarding the internet and/or computers. Adding data elements concerning the type of Wi-Fi offered, the speed of the Wi-Fi, particular internet filters used and their policies, as well as the amount currently

expended on internet and computer services would be useful to include within the IMLS PLS.

Include additional data elements regarding hours of operation. Approximately 30% of the services-related, state-added data elements concerned hours of operation, with 33 states incorporating at least one data element regarding this topic

Include data elements regarding associated outlets, including bookmobiles. Approximately, 7% of the data elements within the Inventory are associated with an administrative entity's branches and books-by-mail programs, with 35 states adding at least one data element to their survey regarding this topic. Although a relatively smaller share of states (12) included additional data elements regarding bookmobiles, it may be useful to include additional data elements to a state's PLS regarding hours of operation and vehicle information.

Appendix A: Methodology

Inventory Creation

The Inventory for State-Added Data Elements to the IMLS PLS was created for a multitude of reasons: to analyze and identify thematic areas of coverage, to serve as a place where any individual can easily locate actual questions that are being asked in the PLS of states across the country, and to help state libraries get ideas and actual questions to use for their own implementation. The 2017 version of the PLS for all states¹⁷ within the United States was submitted to Ithaka S+R and was compared to the 2016 IMLS survey questionnaire.¹⁸ State PLS questionnaires were reviewed to identify which data elements were not included in the 2016 IMLS survey questionnaire. Non-IMLS survey questionnaire items within each state’s PLS were then included within the inventory to be thematically analyzed. Indiana included the most state-added data elements (633), followed by Massachusetts (526), Virginia (482), Oklahoma (476), and Arizona (426). Utah and Wyoming had the least amount of state-added data elements with 7 and 21 respectively.

Within this initial analysis, IMLS PLS data elements were separated from state-added data elements for each state’s survey. A state-added data element was defined as any field within a state’s PLS that required data entry either by an administrative entity or pre-populated by the State Library Agency, and needed to measure a concept distinctly different from, or a component of, what is explicitly asked for in the 2016 IMLS PLS data elements. Additionally, state-added data elements that were listed under a state-specific heading relating to a high level category and/or subcategory were categorized within the corresponding category regarding that topic. For example, a state-added data element requesting “Local” under a state-designated operating revenues heading was categorized with the Operating Revenues high level category and Local subcategory.

State-added data elements that are repeated within a state’s PLS were included within the inventory and analysis only if those repeated state-added data elements corresponded to a different construct. For example, a state requesting “Entry-level salary” was included multiple times within the inventory and analysis if this data element was repeated within the state’s PLS for different positions. If a section within a state’s PLS was repeated, such as repeating outlet-related data elements for multiple

¹⁷ The state of Hawaii and the District of Columbia, as well as the U.S. Territories were not included within the analysis. There were 49 states that were analyzed within this report.

¹⁸ There were no changes made to the 2016 IMLS survey questionnaire in 2017, and was therefore comparable to the 2017 state version.

outlets under the purview of an administrative entity, duplications of these types of sections were not included within the inventory and analysis.

Codebook Creation and Thematic Analysis

The codebook was created using a grounded theory approach, during which one reviewer trained in qualitative analysis methods used an iterative approach to identify recurring data elements. Based on the identified recurring data elements, themes were generated to account for the emerging content-based trends within the additional data elements.

The themes that most prominently arose throughout the inventory and were the most relevant to the MtM project were then considered to be high level categories. High level category themes are overarching and provide context to an area of focus for an individual coded data element. Secondary level thematic areas, subcategories, were created in order to provide more context to the high level category within the coding scheme. Each additional state data element was coded with a high level category and corresponding subcategory (if subcategory is applicable). In total, 15 high level categories and 67 subcategories were identified and analyzed.

The codebook was reviewed in an iterative process by members of Ithaca S+R, COSLA, and IMLS until a final version of the codebook was decided upon. Minor updates pertaining to the names of the subcategories were included throughout the coding process. Coding of each data element and item within the inventory was conducted by one coder. After coding concluded, an interrater reliability check was implemented to test the reliability of the codes and the codebook itself. A second coder was given a small subsection of the entire inventory to code independently with no assistance given by the primary coder. Coders were in 79% agreement for the high level category codes.

Appendix B: High Level Category and Subcategory Assignment

Categories	Number of Data Elements	Overall Percentage	Percentage of Subcategory within High Level Category
Operating Expenditures	1,596	18.06%	
Director Benefits	38		2.38%
Director Salary	93		5.83%
One-Time Material Expenditures	88		5.51%
Ongoing Material Subscription Expenditures	59		3.70%
Other	337		21.12%
Programming Expenditures	23		1.44%
Staff Benefits	195		12.22%
Staff Salary	444		27.82%
Taxes	2		0.13%
Technological Expenditures	64		4.01%
Total	184		11.53%
Utilities	69		4.32%
Human Resources	1,007	11.40%	
Director Hours Worked	16		1.59%
Director Information	182		18.07%
Education Level	233		23.14%
Other	349		34.66%
Staff Hours Worked	139		13.80%
Volunteers	88		8.47%
Services	997	11.28%	
Circulation	419		42.03%
Facilities Accessibility	25		2.51%
Holidays/Days Closed	5		0.50%
Hours of Operation	297		29.79%
Interlibrary Loan	92		9.23%
Library Card(s)	9		0.90%
Library Visits	7		0.70%
Loan Period	5		0.50%
Loan Period	3		0.30%
Makerspace	29		2.91%
Other	25		2.51%
Reference Transactions	21		2.11%
Registered Users	60		6.02%

Governance	950	10.75%	
Board of Trustees	501		52.74%
Friends Group	65		6.84%
Other	66		6.95%
Partnerships	83		8.74%
Policies/Planning	235		24.74%
Operating Revenues	892	10.09%	
Donations/Gifts	25		2.80%
E-Rates	13		1.46%
Federal	108		12.11%
Fees/Fines	60		6.73%
Local	300		33.63%
Other	184		20.63%
State	128		14.35%
Total	74		8.30%
Programs	697	7.89%	
Adult Programs	64		9.18%
After School	5		0.72%
Attendance: Adult	51		7.32%
Attendance: Other	100		14.35%
Career/Employment	9		1.29%
Digital Literacy	43		6.17%
English Language	9		1.29%
GED Program	3		0.43%
Other	217		31.13%
STEM	10		1.43%
Summer Reading	186		26.69%
Library Collections	665	7.53%	
Adult	22		3.31%
Children	23		3.46%
Consortium	64		9.62%
Databases/Electronic Serial Collections	61		9.17%
E-Books	41		6.17%
Materials Added	65		9.77%
Materials Removed	39		5.86%
Microforms	10		1.50%
Museum Passes	4		0.60%
Non-Traditional Items	10		1.50%
Other	216		32.48%
Portable Devices	11		1.65%

Renewals	6		0.90%
Total Collections	78		11.73%
Young Adult	15		2.26%
Associated Outlet Information	580	6.56%	--
Technological Resources and Devices	378	4.28%	
Integrated Library Systems (ILS)	58		15.34%
Internet Filters	25		6.61%
Internet Speed	37		9.79%
Internet Usage	7		1.85%
Other	78		20.63%
Public Computers	48		12.70%
Staff Computers	24		6.35%
Website Information	34		8.99%
Wi-Fi/Connectivity	67		17.72%
Other	227	2.57%	--
Identification	231	2.61%	
Email	13		5.63%
Fax	32		13.85%
Other	99		42.86%
Square Footage	15		6.49%
State Identification Codes	14		6.06%
Web Address	34		14.72%
Year Built/Renovation	24		10.39%
Capital	202	2.29%	--
Survey Feedback	201	2.27%	
Certification of Data	22		10.95%
Collection Method	28		13.93%
Comments	22		10.95%
Other	12		5.97%
Participant Information	117		58.21%
Bookmobiles	124	1.40%	
Collections	2		1.61%
Hours of Operation	28		22.58%
Internet	10		8.06%

Other	57		45.97%
Registered Users	2		1.61%
Stops Made	5		4.03%
Vehicle Information	15		12.10%
Visits	5		4.03%
State Characteristics	90	1.02%	--

Table 2. Frequency of high level categories and subcategories. *N* = 8837

Appendix C: Total State-added Data Elements to the PLS

This table contains the total number of state-added data elements to each individual state's public library survey (PLS). A state-added data element was defined as any field within a state's PLS that required data entry either by an administrative entity or was pre-populated by the State Library Agency, and used to measure a construct distinctly different from, or a component of, what is explicitly asked for in the 2016 IMLS PLS data elements. Ithaka S+R received the 2017 edition of each state's annual public library survey, which were then compared to the IMLS 2016 survey questionnaire to extract state-added data elements. There were no changes made to the 2016 IMLS survey questionnaire in 2017.

State	State-added data elements to the PLS
Alabama	116
Alaska	124
Arizona	65
Arkansas	426
California	103
Colorado	112
Connecticut	212
Delaware	162
Florida	45
Georgia	218
Idaho	110
Illinois	226
Indiana	633
Iowa	118
Kansas	118
Kentucky	295
Louisiana	168
Maine	77
Maryland	43
Massachusetts	526
Michigan	280

Minnesota	201
Mississippi	73
Missouri	194
Montana	57
Nebraska	137
Nevada	130
New Hampshire	39
New Jersey	169
New Mexico	100
New York	421
North Carolina	144
North Dakota	99
Ohio	148
Oklahoma	476
Oregon	126
Pennsylvania	274
Rhode Island	223
South Carolina	121
South Dakota	140
Tennessee	180
Texas	71
Utah	7
Vermont	106
Virginia	482
Washington	294
West Virginia	78
Wisconsin	149
Wyoming	21

Appendix D: Codebook

Item	Definition	Example Code
State	The state corresponding to the public library survey question.	WA
State ID	The state-specific identification number and/or letter associated with the item. If there is no identification associated with the item, then the cell will be left blank.	3.3
Data Element/Performance Indicator	The item/question from the state's annual survey of public libraries.	Local (other, leasehold excise tax, etc.)
State Heading	The category that the state itself has assigned this item/question within their survey.	Library Revenue
High Level Category	The high-level thematic area of focus, which may pertain to the headings within the PLS, or other identified areas. See "High Level Category" codebook for specific categories.	Operating Revenue
Subcategory	The secondary thematic area, which may pertain to the subcategories within the PLS, or other identified subcategories. See codebook for specific subcategories.	Local
Component of IMLS-PLS Specific Data Element/Performance Indicator	Whether or not the additional state-added question is an element of a total sum for a PLS question.	Y
Corresponding IMLS-PLS Specific Data Element/Performance Indicator	The specific Data Element from the PLS of which the additional question is a component. If the question is not a component of an IMLS-PLS Data Element/Performance Indicator, the item will be coded as "Not Applicable" (NA).	Total Local Government Revenue

High Level Category	Definition	Subcategory	Examples
State Characteristics	Items pertaining to the population of the legal service area and/or characteristics that are area-specific (i.e. city specific items). Includes items regarding fiscal year.		ME: 1.28 Library District
Identification	Items pertaining to additional information on the administrative entity.	<ul style="list-style-type: none"> -Email -Fax -State Identification Codes -Square Footage -Web Address -Year Built/Renovation -Other 	LA 2.2a: Year Built
Governance	Items pertaining to the administration or authority within the administrative entity. Does not include any salary or benefit information; these are included under Operating Expenditures.	<ul style="list-style-type: none"> -Board of Trustees -Friends Group -Partnerships -Policies/Planning -Other 	<p>OH 12.6: Year Term Expires</p> <p>WA: 6.31 Is the library in cooperation with other organizations?</p>
Human Resources	Items pertaining to staffing of the library system, including information on the library director. Does not include any salary or benefit information; these are included under Operating Expenditures.	<ul style="list-style-type: none"> -Director Information: Includes assistant director information, education level, etc. -Director Hours Worked: Includes time off, etc. -Education Level -Staff Hours Worked: Includes time off, etc. 	<p>OH 5.15: Total Non MLS FTE</p> <p>WA: 2.6 Total Volunteer Hours</p>

		-Volunteers: Includes number of individuals who work at the library with no salary, including hours worked, and any other information relating to volunteers. -Other	
Operating Revenues	Items pertaining to money or money equivalents received in an accounting period and used for salaries and wages, the costs of library materials and services, and other operating expenditures. Does not include capital revenues; this is included under Capital.	-Donations/Gifts -E-Rates -Federal -Fees/Fines -Local -State -Total -Other	WA: 3.2 Local (from contracting entities) KY B1: Library Tax WA: 7.31 Does the library file for e-rate discounts?
Operating Expenditures	Items pertaining to the current and recurrent costs necessary to support the provision of library services. Expenses by the library in the fiscal year being measured from its regular budget and from all other sources, and supported by expenditure documents. Does not include capital expenditures; this is included under Capital. Includes all salary and benefit information.	-Director Benefits -Director Salary -One-Time Material Expenditures -Ongoing Material Subscription Expenditures -Programming Expenditures -Staff Benefits -Staff Salary -Taxes -Technological Expenditures -Total -Utilities -Other	LA 13.1 Director's Salary LA 13.14c: Total Utilities OH 11.11: A/V Library Materials
Capital	Items pertaining to both capital revenue (to be used for capital expenditures) and capital		OK H6: Other Capital Expenditures

	expenditures (the acquisition of or additions to fixed assets).		
Library Collections	Items pertaining to the physical and/or electronic collection of items that have been purchased, leased or licensed by the library, a consortium, the State Library, a donor, or other person or entity to be used for patron borrowing. Pertains primarily to items that are discoverable/managed within a library's online public catalog or Integrated Library System (ILS) that are available for patron borrowing. Does not include expenditures for library materials or subscriptions; this is included under Operating Expenditures.	<ul style="list-style-type: none"> -Adult -Children -Consortium -Databases/Electronic Serial Collections -E-Books -Materials Added -Materials Removed -Microforms -Museum Passes -Non-Traditional Items -Portable Devices (i.e. Laptops, iPads, Tablets, etc.) -Pre-School -Renewals -Young Adult -Total Collections -Other 	<p>WA: 6.13 Number of renewals</p> <p>KY K1: Adult Fiction</p> <p>LA 10.2d: Total electronic devices for loan to the public</p>
Technological Resources and Devices	Items pertaining only to the number and/or use of electronic products, hardware, and software. Also includes items pertaining to the library's internet usage, website information (excluding the web address), online catalogs, and integrated library systems. Does not include any expenditure or revenue information (see Operating Expenditures and	<ul style="list-style-type: none"> -Integrated Library Systems (ILS) -Internet Filters -Internet Speed -Internet Usage -Public Computers -Staff Computers -Website Information: Includes virtual visits to the library's website, and any other information relating to the website other than the website address (see Identification). 	<p>NY 5.1: Automated circulation system?</p> <p>NE 6.5: Internet Service Provider</p> <p>VA 11.2: Total number of searches of library's online catalog</p>

	Operating Revenues), nor information on patron borrowing (see Library Collections).	-Wi-Fi/Connectivity -Other	
Services	Items pertaining to services offered by the library, excluding library programs, which are included under Programs.	-Circulation -Facilities Accessibility -Holidays/Days Closed -Hours of Operation -Interlibrary Loan -Library Card(s) -Library Visits -Loan Period -Makerspace -Meeting Rooms -Reference Transactions -Registered Users -Other	WA: 1.19 Number of Non-Resident Users WA: 6.4 Virtual Reference Transactions ME: 6.14 Lending period (in weeks) ME: 4.11 Do you have a dedicated Makerspace?
Programs	Items pertaining to any planned events that introduce the group attending to any of the broad range of library services or activities, or which directly provide information to participants.	-Adult Programs -After School -Attendance: Adult -Attendance: Other -Career/Employment -Digital Literacy -English Language -GED Program -STEM -Summer Reading -Other	WA: 6.24 Adult Programs RI: Elderly Program Attendance
Survey Feedback	Items pertaining to insights regarding the public library survey, any other comments on their fiscal year, and/or other state-specific	-Certification of Data: Includes authentication of data (i.e. making sure that the data are accurate	ME 13.1: Name of person completing report

	qualitative/open-ended questions. Includes information regarding the person completing the survey, as well as questions regarding the administrative entity's data collection methods.	before sent to the SDC and/or vendor). -Collection Method -Comments -Participant Information: Who is completing the survey (e.g. the names/addresses of the participant) -Other	LA 4.2d: Are library visits an actual count?
Associated Outlet Information	Items pertaining to the individual outlets within an administrative entity, specified by state-specific section headings. Includes individual addresses, state codes, collections, expenditures, programs, etc. Does not include any items regarding bookmobiles.		LA 2.5t: Do you offer wireless access for the public at this branch? OH 2.24: Wireless Sessions Per Year
Bookmobiles	All items pertaining to bookmobiles.	-Collections -Hours of Operation -Internet -Registered Users -Stops Made -Vehicle Information -Visits -Other	LA 4.2b: Total Number of Bookmobile visits in the past year KY G4: License Number KY G9: Hours on the Road Per Week
Other	All other questions that are not associated with any of the categories listed above.		KY P1: Title of Challenged Work SD I03: Local government ordinance or minutes are on file with SDSL?

Appendix E: State Data Coordinator Interview Script

The Role of the SDC

- 1) Can you describe what a typical year of data collection and reporting looks like for your state's annual survey of public libraries?
- 2) How have the questions within your state's annual survey of public libraries, aside from the IMLS PLS questions, changed over the course of your tenure as the SDC?
- 3) Do you work alone on your state's annual survey of public libraries, or do you collaborate with others (e.g. consultants, assistant data coordinators, data analysts, etc.)?

Decision-Making in Planning for the State Annual Survey

- 4) What is the process for deciding to add new questions to your state's annual survey of public libraries, aside from the addition of the IMLS PLS questions?
- 5) What is the process for the removal of questions from your state's annual survey of public libraries, aside from the removal of IMLS PLS questions?
- 6) Are there any particular individuals that provide feedback to make such changes (e.g. State Librarian, vendors, etc.)?
- 7) Aside from the changes to the IMLS PLS questions, can you provide an example of a change/addition/removal that was made to your state's annual survey of public libraries over your tenure, and the rationale for that change?
- 8) Do you know if there were any changes within your state's annual survey of public libraries, aside from the changes to the IMLS PLS questions, within the past five years?
- 9) To what extent are you aware of how other states coordinate their state's annual survey of public libraries, and decide to add, change, or remove questions, aside from the IMLS PLS questions?
- 10) What is your state's current method for state-wide data collection (i.e. Counting Opinions, Bibliostat, or another method)?
- 11) Approximately how much time does it take to get all of the libraries to submit their completed annual survey of public libraries?

Administering the Annual State Survey/Data Collection

- 12) Who completes your state's annual survey of public libraries within the individual public library?
- 13) What is considered a successful response rate for your state's annual survey of public libraries each year, and what is the average response rate for your state's annual survey of public libraries each year?
- 14) What specific challenges are typically faced during the data collection phase for your state's annual survey of public libraries?

Analyzing Results

- 15) Do you analyze the data, and/or does an outside vendor/other person help to analyze the data?
- 16) What are your biggest challenges in analyzing the results?
- 17) What is your state's method for reviewing these data for accuracy?
- 18) Once the data have been reviewed for accuracy, how are the data aggregated for reporting?
- 19) Do you disseminate the findings to your state's individual libraries?
- 20) Does previous years' data from your state's annual survey of public libraries, aside from the data from the IMLS PLS questions, inform future changes to your annual survey (i.e. determining what to add/remove/change)?
- 21) How have the results from your state's annual survey of public libraries, aside from the results from the IMLS PLS questions, informed decision making (i.e. programming, funding, etc.) for your state's libraries?

Appendix F: Vendor Interview Script

The Role of the Vendor

- 1) Approximately how many State Library Agency customers currently use your platform to collect data for their state's public library survey?
- 2) Can you describe a typical year of working with SDCs and their public library survey?
- 3) Does a representative provide any training(s) to SDCs or to individual libraries regarding the use of your services/products?
- 4) Generally, what is your opinion of your current SDC customers' expertise level regarding creation and ongoing management of questions for their public library survey?

Vendor Platform Services & Products

- 5) Are there specific services and/or products that the SDCs can choose from, or is there a standardized format specifically designed for state public library surveys?
- 6) Can you describe what your process is for developing and updating services and/or products for your State Library Agency customers?
- 7) Can you describe your development roadmaps of Application Program Interfaces (APIs), specifically for your State Library Agency customers?
- 8) What features of your services/products do you find the most useful for a state's public library survey? Why?

Collected Data

- 9) To what extent are you aware of which questions within a state's public library survey is nationally asked/provided by the IMLS PLS?
- 10) Have you noticed any trends and/or patterns regarding what states are asking in addition to the nationally provided, IMLS PLS questions?
- 11) From your experience with your State Library Agency customers, what, if any, potential uses do you envision for the data beyond national reporting?