

Public Libraries Survey & Statistical Report of North Carolina Public Libraries

Report Instructions & Definitions Fiscal Year 2025



Data collected from this questionnaire is reported to the Institute of Museum and Library Services as part of the national Public Libraries Survey.

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Introduction

The statistics collected on this form are used to compile the Annual Statistical Tables and Directory of North Carolina Public Libraries. Selected data are also reported to the Public Library Statistics Cooperative (PLSC) to be used in the creation of a composite report on public libraries in the United States by the Institute of Museum and Library Services. Definitions ensure comparability of data from different libraries and different states.

Survey items that are highlighted gray are pre-filled or auto-calculated by the survey software. Depending on the type of data, some pre-filled items are locked and can only be changed by contacting the survey administrator. Items highlighted yellow are new modifications and a response is not required, though it is encouraged to report if possible.

Unless otherwise indicated, report data for the year beginning July 1, 2024 and ending June 30, 2025.

Survey Contact

For more information or questions, contact the survey administrator: Amanda Johnson, Amanda.johnson@dncr.nc.gov or [book a virtual meeting](#).

Timeline

July 15, 2025: The survey opens in LibPAS. Each survey contact will receive an email with login credentials.

September 15, 2025: The survey must be locked (submitted) in LibPAS by end of day.

September – November 2025: Review and verification by the State Library. Libraries may be asked to provide further information or verify submissions.

December 2025: Draft data tables are released on the State Library's website and data is available in the reporting module of LibPAS.

January-April 2026: Data is submitted to IMLS. Libraries may again be asked to provide further information or verify submissions.

May/June 2026: Final certified data is released.

Training Resources

All data is to be reported through [LibPAS](#). An overview of how to input data into LibPAS is available on the home page after logging in.

Additional training materials and resource documents are provided on the homepage of LibPAS as well as linked in this document.

Accessing and Using Public Library Data

State Data Products

The State Library of North Carolina makes available several resources to facilitate accessing and using the annual report data. Resources available include:

Data Tables: The State Library publishes on its [website](#) 14 data tables annually that display selected data from the annual report. The tables download in Microsoft Excel and feature sortable and filterable columns. A raw .csv export of the data is also available.

Quick Reports: Quick reports are available on the homepage of LibPAS including a 5-year trend report, state raking for key metrics, comparison table, as well as collections, technology, programming and services, and finance and staffing reports.

Infographics: The State Library of North Carolina has created an [Infographics](#) and [template](#) library that features statewide infographics and downloadable templates.

NC public library staff also have access to current and prior year of data in the LibPAS Reporting module. Several types of reports are available including trend and comparison reports. The report module also includes access to downloadable template pamphlets and infographics. All downloads open in Microsoft Excel or Word and are fully customizable.

Data is published in Excel files on the State Library along with the instruction manual. are also available.

Federal Data Products

The Institute of Museum and Library Services (IMLS) aggregates and disseminates data from the Annual Public Libraries Survey. The Office of Research at IMLS makes available several tools to encourage use of the PLS data in their [PLS Data Catalog](#) including:

- Raw data files
- Supplementary tables with key ratios and percentages
- State profiles
- Research briefs
- Annual reports

IMLS also makes available the [Library Search and Compare](#) tool which allows libraries to find similar libraries for benchmarking.

Section A: PLSC Codes

These data elements are reported to PLSC and are used to identify characteristics of the library system for comparative analysis. These values are prefilled for you and do not usually change from year to year. If changes are needed, contact Amanda Johnson, Amanda.johnson@dncr.nc.gov.

Number	Indicator	Definition	Internal Notes
A.1.	PLSC ID	<u>This is prefilled by the State Library.</u> This is the identification code assigned by PLSC. Outlets are assigned the same ID as the administrative entity to which they belong, with a unique suffix added to distinguish each outlet.	
A.2.	Lib ID	<u>This is prefilled by the State Library.</u> This is the state-assigned identification code for the administrative entity or outlet.	
A.3.	Interlibrary relationship code	<u>This is prefilled by the State Library.</u> Select one of the following: HQ = Headquarters of a System, Federation, or Cooperative Service; ME = Member of a System, Federation, or Cooperative Service, but not the headquarters; NO = Not a Member of a System, Federation, or Cooperative Service. NOTE: North Carolina libraries are all “NO”.	
A.4.	Legal basis code	<u>This is prefilled by the State Library.</u> The legal basis is the type of local government structure within which the entity functions. It reflects the state or local law which authorizes the library. Select one of the following: CI = Municipal Government (city, town or village); CO = County; CC = City/County; MJ = Multi-jurisdictional; NL = Native American Tribal Government; NP = Non-profit Association or Agency; SC = School District; SD = Special Library District (authority, board, commission); OT = Other. Note: Put city/county combinations under ‘CC’, rather than under Multi-jurisdictional.	
A.5.	Administrative structure code	<u>This is prefilled by the State Library.</u> This code identifies an autonomous library entity that has its own governance and funding. Select one of the following: MA = Administrative entity with multiple direct service outlets where administrative offices are separate; MO = Administrative entity with multiple direct service outlets where administrative offices are not separate; SO = Administrative entity with a single direct service outlet.	
A.6.	FSCS public library definition	<u>This is prefilled by the State Library.</u> Answer yes or no to the following question: Does this public library meet all the criteria of the FSCS (Federal State Cooperative System) public library definition?	

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		A public library is an entity that is established under state enabling laws or regulations to serve a community, district, or region, and that provides at least the following: 1. An organized collection of printed or other library materials, or a combination thereof; 2. Paid staff; 3. An established schedule in which services of the staff are available to the public; 4. The facilities necessary to support such a collection, staff, and schedule; and 5. Is supported in whole or in part with public funds.	
A.7.	Geographic code	This is prefilled by the State Library. The Geographic Code should represent the basis for the Population of Legal Service Area (data element #208), including areas served under contract, and as such should be determined by the state library agency. Each geography type has at least two subtypes: “entirety” and “overlap.” If the LSA is not coterminous with one of the geography types, select the “overlap” option for the geography type that most overlaps the LSA. For “County or Equivalent” and “Multi-County” geographies, a third subtype, “remainder excluding AEs of contained geographies,” exists specifically for AEs that serve the areas of counties outside of municipalities with separate AEs. PL1—Place (e.g., incorporated city or village, census designated), entirety PL2—Place (e.g., incorporated city or village, census designated), overlap MP1—Multi-Place, entirety MP2—Multi-Place, overlap CD1—Minor Civil Division [MCD] (e.g., town, township), entirety CD2—Minor Civil Division [MCD] (e.g., town, township), overlap MD1—Multi-MCD, entirety MD2—Multi-MCD, overlap CO1—County or Equivalent, entirety CO2—County or Equivalent, overlap CO3—County or Equivalent, remainder excluding AEs of contained geographies MC1—Multi-County, entirety MC2—Multi-County, overlap MC3—Multi-County, remainder excluding AEs of contained geographies SU1—School District - Unified, entirety SU2—School District - Unified, overlap	

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		SE1—School District - Elementary, entirety SE2—School District - Elementary, overlap SS1—School District - Secondary, entirety SS2—School District - Secondary, overlap OTH—Other	
A.8.	Legal service area boundary change	<u>This is prefilled by the State Library.</u> Answer yes or no to the following question: Did the administrative entity’s legal service area boundaries change since last year? Note: Changes are likely to result, for example, when a municipality annexes land or when an administrative entity contracts to provide public library service for some additional geographic area other than the geographic area for which it was established (e.g., a municipal library contracts to serve county residents).	
A.9.	Population of the legal service area	<u>This is prefilled by the State Library.</u> The number of people in the geographic area for which a public library has been established to offer services and from which (or on behalf of which) the library derives revenue, plus any areas served under contract for which the library is the primary service provider. Note: The determination of this population figure shall be the responsibility of the state library agency. This population figure should be based on the most recent state population figures for jurisdictions in your state available from the State Data Center. The State Data Coordinator should obtain these figures annually from the State Data Center or other state sources. Note: The pre-filled number reflects the prior year’s certified population from the NC Office of Budget and Management. The population is updated by State Library staff prior to PLSC submission once the current year’s data is released.	

Section B. General Information

Number	Indicator	Definition	Internal Notes
B.1-4.	Mailing Address	Administrative entity's mailing address. If your mailing address has changed since last year, please contact Amanda Johnson, Amanda.johnson@dncr.nc.gov .	
B.5-8.	Street Address	The complete street address of the administrative entity or outlet. If your street address has changed since last year, please contact Amanda Johnson. Note: Do not report a post office box or general delivery.	
B.9.	Legal Name	The legal name of the administrative entity or outlet. Note: Do not use acronyms. Do not abbreviate the name unless it exceeds the field length of 60 characters. Avoid abbreviations at the beginning of the name and do not punctuate abbreviations.	
B.10.	Economic Tier	The 2021 Economic Tier designated by the NC Department of Commerce. Regional Libraries have been assigned a tier based on where the majority of their population lives.	
B.11.	Library type	Municipal, county, or regional library	
B.12.	County	The county in which the library is situated. For Regional Libraries, this is the county in which the Regional headquarters is located.	
B.13.	Library Director	Name of the library director.	
B.14.	Phone	The telephone number of the administrative entity, including area code. Note: Report telephone number without spacing or punctuation.	
B.15.	Email Address	Director's email address.	
B.16.	Local Data Coordinator	Name of the person completing the form.	
B.17.	Title	Title of the person completing the form.	
B.18.	Phone Number	Phone number for the person completing the form.	
B.19.	Email Address	Email address for the person completing the form.	

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B.20.	Web Address	The Web Address of the administrative entity starting with http://	
B.21.	Does the library have a Foundation that supports systemwide operations? (NEW)	Response options: Yes, a 501c3 registered Foundation; Yes, a Foundation that is not a registered 501c3; No, the library system does not have a Foundation	
B.22	Does the library have a friends group that supports systemwide operations? (NEW)	Response options: Yes, a 501c3 registered Friends Group Yes, a Friends Group that is not a registered 501c3; No, the library system does not have a Friends Group	

Service Outlets

Number	Indicator	Definition	Internal Notes
B.23.	Number of Central Libraries	A single outlet library, or the service outlet which is the operational center of a multiple-outlet library. Usually all processing is centralized here and the principal collections are housed here. Synonymous with the main library. Note: Administrative centers are not counted as central libraries, i.e., offices that are separate from the direct service outlets and do not provide direct library services, but may provide staff, materials, and services to other libraries. Count these as branches.	
B.24.	Number of Branch Libraries	An auxiliary unit which has all of the following: (1) separate quarters; (2) an organized collection of library materials; (3) paid staff; and (4) regularly scheduled hours for being open to the public. County libraries of a regional system are listed here. Report all branches including those housed in the same building as the regional library.	
B.25.	Number of Bookmobiles	A traveling branch library which has all of the following: 1) a truck or van that carries an organized collection of library materials; 2) paid staff; and 3) regularly scheduled hours (bookmobile stops) for being open to the public. Count the number of vehicles in use, not the number of stops the vehicle makes.	
B.26.	Number of Other Mobile Units	Other vehicles or vans used for library programming (e. g., service to daycare centers, senior centers, etc.) that do not meet the definition of "bookmobile" above.	
B.27.	Number of Kiosks	Report the total number of kiosk locations. Kiosks are unstaffed, off-site locations where patrons can access physical or electronic library items.	

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		Note: Do not include free little libraries. Include only locations where items are checked-in and out	
	Total Service Outlets	This field is auto-calculated. Formula: <i>central libraries + branch libraries + bookmobiles + other mobile units + kiosks</i> .	
B.28.	Public Service Hours Per Year	This is the sum of annual public service hours for all outlets. It is automatically calculated based on the hours reported individually for the central library, branches, bookmobiles and books by mail service under Branch Information - Section M.	

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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.	

Salaries

Administration

Number	Indicator	Definition	Internal Notes
C.7.	Director's salary	Salary as of June 30 of the fiscal year in question.	
C.8.	Salary range of Library Director position	The minimum salary and maximum salary of this position as of June 30 of the fiscal year in question.	
C.9.	Year of appointment of Library Director	Calendar year in which the library director was employed in that position. Ex. "2014."	
C.10.	Assistant Director salary	Salary as of June 30 of the fiscal year in question.	
C.11.	Finance Officer salary	Salary as of June 30 of the fiscal year in question. Leave blank if the finance officer reports to a department outside the library.	

Management Librarians

How to determine which positions to include:

Only include professional librarians who hold a master's degree from a library and information science program. Management staff should include staff responsible for high-level decision making and may or may not have direct reports. If the position doesn't exist, leave blank.

How to report salaries:

Report the FTE minimum and maximum actual annual salaries for the following management positions as the last day of the fiscal year in question. To report average salary, average the salaries for all FTEs holding the position as of June 30.

Branch Manager				
C.12. Minimum	C.13. Maximum	C.14. Average	C.15. Education Requirement	Internal Notes
Youth Services Manager: Report salaries for managers whose primary responsibilities include youth services and youth programs. Include teen services managers.				
C.16. Minimum	C.17. Maximum	C.18. Average	C.19. Education Requirement	Internal Notes
Adult Services Manager: Report salaries for managers whose primary responsibilities include adult services and adult programs. Include reference managers.				
C.20. Minimum	C.21. Maximum	C.22. Average	C.23. Education Requirement	Internal Notes

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Technical Services Managers: Report salaries for positions whose primary responsibilities include cataloging and acquisitions.				
C.24. Minimum	C.25. Maximum	C.26. Average	C.27. Education Requirement	Internal Notes
Circulation Manager: Report salaries for positions whose primary responsibilities include circulation and access services.				
C.28. Minimum	C.29. Maximum	C.30. Average	C.31. Education Requirement	Internal Notes
Other Managers: Report all other management positions not included above.				
C.32. Minimum	C.33. Maximum	C.34. Average		Internal Notes

Other Librarians

Youth Services Librarians: Report salaries for staff whose primary responsibilities include youth services and youth programs. Include teen services staff.				
C.35. Minimum	C.36. Maximum	C.37. Average	C.38. Education Requirement	Internal Notes
Adult Services Librarians: Report salaries for staff whose primary responsibilities include adult services and adult programs. Include reference staff.				
C.39. Minimum	C.40. Maximum	C.41. Average	C.42. Education Requirement	Internal Notes
Technical Services Librarians: Report salaries for positions whose primary responsibilities include cataloging and acquisitions.				
C.43. Minimum	C.44. Maximum	C.45. Average	C.46. Education Requirement	Internal Notes
Circulation Librarians: Report salaries for positions whose primary responsibilities include circulation and access services.				
C.47. Minimum	C.48. Maximum	C.49. Average	C.50. Education Requirement	Internal Notes
Other Librarian: Report all other librarian positions not included above.				
C.51. Minimum	C.52. Maximum	C.53. Average		Internal Notes

Other Staff

Library Assistant (Supervisory): Report salaries for library assistant positions that have management or supervisory responsibilities.				
C.54. Minimum	C.55. Maximum	C.56. Average	C.57. Education Requirement	Internal Notes
Library Assistant: Report salaries for library assistants.				
C.58. Minimum	C.59. Maximum	C.60. Average	C.61. Education Requirement	Internal Notes
IT Personnel: Report salaries for IT personnel.				
C.62. Minimum	C.63. Maximum	C.64. Average		Internal Notes

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Section D: Operating Income

What types of income to include:

Report income received from government sources and used for current and recurrent expenses for operating the library including wages and benefits, collections, technology, and facility maintenance. In-kind contributions can be included if a monetary value is assigned by the local government. It is recommended that reporting be consistent with what is reported on the library's State Aid application.

Grants and monetary gifts used for operating expenses should be reported. If the grant spans reporting periods, include only income received within the fiscal year.

Exclude:

Do not include income for capital expenditures, contributions to endowments, income passed through to another agency (e.g. fines), or any carryover funds.

Local Government Income

Number	Indicator	Definition	Internal Notes
D.1.	Municipal Income	Includes all tax and non-tax receipts designated by municipalities and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, fines, or fees. Do not include state, federal, and other funds passed through local government for libraries. Report these funds with state or federal government revenue, as appropriate.	
D.2.	County Income	Include all tax and non-tax receipts designated by counties and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, fines, or fees. Do not include state, federal, and other funds passed through local government for libraries. Report these funds with state or federal government revenue, as appropriate.	
D.3.	Total Local Government Income	This is automatically calculated for you. County funds + Municipal funds	

State Government Income

Number	Indicator	Definition	Internal Notes
D.4.	Aid to Public Libraries Income	<u>This field is pre-filled by the State Library.</u> If you believe there is an error, please contact Amanda Johnson .	

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D.5.	Non-recurring SFRF Funds	SFRF Funds distributed from the state during the reporting period.	
D.6.	Other State Income	Includes all other funds distributed by State government except for federal money distributed by the State and income from the Aid to Public Libraries Fund.	
D.7.	Total State Government Income	This is automatically calculated for you. Other state funds + Aid to Public Libraries grant	

Federal Government Income

Number	Indicator	Definition	Internal Notes
D.8.	LSTA income	<u>This field is pre-filled by the State Library.</u> If you believe there is an error, please contact Amanda Johnson . Note: A grant award may be split between fiscal years depending on when reimbursement is processed.	
D.9.	Other federal income	Enter federal grants distributed directly to the public library, such as National Endowment for the Humanities (NEH) grants, Higher Education Act (HEA) grants, etc.	
D.10.	Total federal Government Income	<u>This is automatically calculated for you.</u> Other federal funds + LSTA income	

All Other Income

Number	Indicator	Definition	Internal Notes
D.11.	All other funds	All operating income not previously reported. Include only those items that were added to the library's operating budget. Include, for example: - Grants from non-governmental organizations - monetary gifts and donations - interest - library fines, and fees for library services Do not include the value of any contributed or in-kind services or the value of any non-monetary gifts and donations.	

Total Operating Income

Number	Indicator	Definition	Internal Notes
D.12.	Total operating income	<u>This is automatically calculated for you.</u> Total local income + Total state funds + Total federal funds + All other funds.	

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Section E: Operating Expenditures

What types of expenditures to include:

Operating expenditures are the current and recurrent costs necessary to support the provision of library services. Significant costs especially benefits and salaries, that are paid by other taxing agencies (government agencies with the authority to levy taxes) "on behalf of" the library may be included if the information is available to the reporting agency.

Report actual expenditures, not budgeted amounts. Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included.

Exclude:

Do not report the value of free items as expenditures.

Do not report estimated costs as expenditures.

Do not report capital expenditures under this category.

Personnel Expenditures

When reporting personnel expenditures include all staff including plant operations, security, and maintenance staff.

Number	Indicator	Definition	Internal Notes
E.1.	Salaries and wages expenditures	The salary and wages for all library staff. Include salaries and wages before deductions but exclude employee benefits.	
E.2.	Employee benefits expenditures	Benefits outside of salary and wages paid and accruing to employees, regardless of whether the benefits or equivalent cash options are available to all employees. Include amounts spent by the library for direct, paid employee benefits including: • Social Security • Retirement • Insurance • Guaranteed disability income protection • Unemployment compensation • Workmen's compensation • Tuition • Housing benefits	
E.3.	Total staff expenditures	<u>This field is auto-calculated for you.</u> Employee benefits expenditures + Salaries and wages expenditures	

Collection Expenditures

This includes all operating expenditures from the library budget for materials in print, microform, electronic and other formats considered part of the collection, whether purchased, leased, or licensed. Exclude charges or fees for interlibrary loans and expenditures for document delivery.

Number	Indicator	Definition	Internal Notes
E.4.	Print materials expenditures	Report all operating expenditures for the following print materials: books, serial back files, current serial subscriptions, government documents, and any other print acquisitions.	
E.5.	Electronic materials expenditures	Report all operating expenditures for electronic (digital) content. Include expenditures for electronic content for which the library has acquired permanent or temporary access rights. Include fees paid to platforms that provide licensed content. Electronic content can be accessed online from an electronic device. Types of electronic content include electronic materials (e-books, e-serials, e-audio, e-video), research databases, online learning platforms, reference tools, scores, maps, and pictures in electronic or digital format. Note: Expenditures for computer software used to support library operations or to link to external networks, including the Internet, are reported under Other Operating Expenditures (data element E.8.).	
E.6.	Other Physical material expenditures	Report all operating expenditures for other materials, such as microform, audio and video physical units, DVD, circulating portable electronic devices, and materials in new formats.	
E.7.	Total collection expenditures	<u>This field is auto-calculated for you.</u> Other materials expenditures + Electronic materials expenditures + Print materials expenditures.	

Other Expenditures

Number	Indicator	Definition	Internal Notes
E.8.	Other operating expenditures	Include all expenditures not covered in the sections for personnel and collections. Include expenses such as binding, supplies, repair or replacement of existing furnishings and equipment; and costs of computer hardware and software used to support library operations or to link to external networks, including the Internet. Report contracts for services, such as costs of operating and maintaining physical facilities, and fees paid to a consultant, auditor, architect, attorney, etc.	

Total Operating Expenditures

Number	Indicator	Definition	Internal Notes
E.9.	Total operating expenditures	<u>This field is auto-calculated for you.</u> <i>Salaries + Benefits + Other Material expenditures + Print Material Expenditures + Electronic Material Expenditures + Other expenditures</i>	
E.10.	Total unencumbered operational balance	<u>This field is auto-calculated for you.</u> <i>Total Operating Income – Total Operating Expenditures</i>	

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Section F: Capital Income and Expenditures

What types of income and expenditures to include:

Report all revenue to be used for major capital expenditures. Examples include funds received for:

- site acquisition and new buildings
- additions to or renovation of library buildings
- furnishings, equipment, and initial book stock for new buildings, building additions, or building renovations
- library automation systems
- new vehicles
- other one-time major projects

Exclude:

Exclude revenue to be used for:

- regular or ongoing replacement and repair of existing furnishings and equipment including computers
- regular purchase of library materials
- investments for capital appreciation
- contributions to endowments, income passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover)

Any funds that there were designated for capital expenses and are re-allocated to pay for operating costs, should be reported in sections D and E.

Number	Indicator	Definition	Internal Notes
F.1.	Local capital revenue	Report all governmental funds designated by the community, district, or region and available to the library for the purpose of major capital expenditures, except for state and/or federal money distributed by the local government.	
F.2.	State capital revenue	Report all funds distributed by state government for expenditure by the library for the purpose of major capital expenditures, except for federal money distributed by the state.	
F.3.	Federal capital revenue	Report federal governmental funds, including federal funds distributed by the state or locality, and grants and aid received by the library for the purpose of major capital expenditures.	
F.4.	Other capital revenue	Report private (non-governmental) funds, including grants received by the library for the purpose of major capital expenditures	
F.5.	Total capital revenue	<u>This is auto-calculated for you.</u> <i>Government Capital Revenue + Federal Gov't Capital Revenue + Other Capital Revenue</i>	

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Section G: Collections

What to include in collections:

This section of the survey collects data on selected types of materials. It does not cover all materials (i.e., microform, loose sheet music, maps, and pictures) for which expenditures are reported under Print Materials Expenditures, Electronic Materials Expenditures, and Other Material Expenditures.

Under this category report only items that have been purchased, leased or licensed by the library, a consortium, the state library, a donor or other person or entity.

Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required.

Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.

Exclude:

Do not include items freely available without monetary exchange.

Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use.

Print Books

Books are non-serial printed publications (including bound music scores and maps) that are bound in hard or soft covers, or in loose-leaf format. Include non-serial government documents. Report the number of physical units, including duplicates, in each category requested in these questions.

Notes: This section is pre-filled for NC Cardinal members.

Floating collections can be reported by either the material's physical location as of June 30 or its home location if one is designated. All materials must be reported in a consistent manner for all locations within a library system.

Adult	Young Adult	Juvenile	Internal Notes
G. 1. Fiction	G. 2. Fiction	G. 3. Fiction	
G. 4. Non-Fiction	G. 5. Non-Fiction	G. 6. Non-Fiction	
G. 7. Total Adult Books	G. 8. Total YA Books	G. 9. Total Juvenile Books	

Number	Indicator	Definition	Internal Notes
G.10.	Total book volumes	<u>This field is auto-calculated for you.</u> <i>Adult fiction + Adult non-fiction + Juvenile fiction + Juvenile non-fiction + YA fiction + YA non-fiction</i>	

Other Print Materials

Note: Floating collections can be reported by either the material's physical location as of June 30 or its home location if one is designated. All materials must be reported in a consistent manner for all locations within a library system. This section is pre-filled for NC Cardinal members.

Number	Indicator	Definition	Internal Notes
G.11.	Other print materials	Use this field only if necessary. Report the number of physical units for all other print materials. DO NOT track toys, puzzles, games, computer games, or other non-print materials here. These items can be tracked in "Other non-print materials." Note: This is pre-filled for NC Cardinal members.	
G.12.	Current print serial subscriptions	Count subscriptions purchased from the library's budget and those donated to the library as gifts. Examples of serials are periodicals (magazines), newspapers, annuals, some government documents, some reference tools, and numbered monographic series. <u>Count titles, including duplicates, DO NOT COUNT INDIVIDUAL ISSUES.</u> Include the total number of subscriptions for all outlets. For example, if the library has four subscriptions to <i>Time</i> , then count four. Current serial subscriptions are arrangements by which, in return for a sum paid in advance, serials are provided for a specified number of issues. Note: This is pre-filled for NC Cardinal members.	

Non-Print Physical Materials

Note: Floating collections can be reported by either the material's physical location as of June 30 or its home location if one is designated. All materials must be reported in a consistent manner for all locations within a library system. This section is pre-filled for NC Cardinal members.

Number	Indicator	Definition	Internal Notes
G.13.	Audio – Physical units	Materials circulated in a fixed, physical format on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically, electronically, or both. Include records, audio cassettes, audio cartridges, audio discs (including audio CD ROMs), audio reels, talking books, and other sound recordings stored in a fixed, physical format. Report the number of units, including duplicates. Items packaged together as a unit (e.g. two compact discs for one recorded book) and checked out as a unit are counted as one physical unit.	

		<u>Do not</u> include downloadable electronic audio files. Note: This is pre-filled for NC Cardinal members.	
G.14.	Video – Physical units	Materials circulated in a fixed, physical format on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver or computer monitor. Video formats may include tape, DVD and CD ROM. Report the number of units, including duplicate titles. Items packaged together as a unit (e.g. two compact discs for one recorded book) and checked out as a unit are counted as one physical unit. <u>Do not</u> include downloadable electronic video files. Note: This is pre-filled for NC Cardinal members.	
G.15.	Other non-print analog materials	Use this field only if necessary. Report the number of physical units for all other non-print materials. Microfiche, microfilms, and other microforms, puzzles, games, video games, tools, etc. can be included. Note: This is pre-filled for NC Cardinal members.	

Electronic Collections (Databases)

An electronic collection is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts, photographs, music, video, etc.) with a common user interface and software for the retrieval and use of the data. An electronic collection may be organized, curated and electronically shared by the library, or rights may be provided by a third-party vendor. Other characteristics:

- Items retrieved from electronic collections do not have a circulation period and may be retained by the patron.
- Remote access to the collection may or may not require authentication.
- Unit records may or may not be included in the library's catalog; the library may or may not select individual titles. Include electronic collections that are available online or are locally hosted in the library.
- An electronic collection may be funded by the library, or provided through cooperative agreement with other libraries, or through the State Library.
- Do not include electronic collections that are provided by third parties and freely linked to on the web.

Report the number of electronic collections acquired through curation, payment or formal agreement, by source of access.

Number	Indicator	Definition	Internal Notes
G.16.	Local/other cooperative agreements	Report the number of databases acquired by the library directly or through a regional or state-wide	

		cooperative agreement. Do not count NC LIVE databases.	
G.17.	NC LIVE databases	The number of NC LIVE databases will be pre-filled by State Library staff and should not be included elsewhere.	
G.18.	Total licensed database	<i>This field is auto-calculated for you. Local/other cooperative agreements + NC LIVE</i>	

Electronic Materials

What to include in collections:

Electronic (digital) materials can be accessed online from an electronic device. Types of electronic materials include e-books, e-serials, e-audio, and e-video. Only count items that require user authentication and have a limited period of use. Count all checkouts, including renewals.

Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.

For collections, where items are purchased as they are requested by users, only report the number of items actually acquired for patrons, not the entirety of the collection.

Note: For purposes of this survey, units are defined as “units of acquisition or purchase.” The “unit” is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users.

Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units.”

Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 “units.”

Exclude:

Report the number of units, not titles. Include only units that have been purchased, leased or donated. Do not include items freely available without monetary exchange.

Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use.

Consortia Materials:

Data is pre-filled for NC Live, NC Kids, e-INC, and NCDL.

E-book Definition

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 Definition

E-audio are digital files of sound only (e.g., audiobooks, music) that may be accessed online from an electronic device.

E-video Definition

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-periodicals Definition

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.

	E-books	E-Audio	E-Video	E-Periodicals	Internal Notes
NC Live	G. 19. Pre-filled	G. 20. Pre-filled	G. 21. Pre-filled	G. 22. Pre-filled	
NC Kids	G. 23. Pre-filled	G. 24. Pre-filled	G. 25. Pre-filled	G. 26. Pre-filled	
e-iNC	G. 27. Pre-filled	G. 28. Pre-filled	G. 29. Pre-filled	G. 30. Pre-filled	
NCDL	G. 31. Pre-filled	G. 32. Pre-filled	G. 33. Pre-filled	G. 34. Pre-filled	
Local	G. 35.	G. 36.	G. 37.	G. 38.	
Total	G. 39. Auto-calculated	G. 40. Auto-calculated	G. 41. Auto-calculated	G. 42. Auto-calculated	

Electronic Materials – Access and Purchasing

Number	Indicator	Definition	Internal Notes
G.43.	Does the library system utilize the Overdrive platform independent of NC Live resources?	Yes/no Due to the integration of NC Live's Homegrown collection into local Overdrive collections, Homegrown titles and usage are reported in both NC Live and local library vendor reports. Please report e-material data using vendor reports as usual. After submission, SLNC staff will work with NC Live to adjust collection and usage counts to prevent duplication. Libraries will be notified via email once this adjustment made and provided details on any adjustment made for their library.	

E-books

Number	Indicator	Definition	Internal Notes
G.44.	Did the library system provide access to e-books purchased solely by the library system?	Response options: yes/no	
G.45.	Did the library system provide access to e-books purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?	Response options: yes/no Consortia include large consortia such as NCDL, e-iNC, NC Kids, as well as any smaller regional or local agreements for electronic materials.	
G. 46.	Did the library system provide access to e-books provided by the state library agency or another state agency at no or minimal cost to the library system?	Response options: yes/no This includes NC Live resources.	

E-audio

Number	Indicator	Definition	Internal Notes
G.47.	Did the library system provide access to e-audio purchased solely by the library system?	Response options: yes/no	
G.48.	Did the library system provide access to e-audio purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?	Response options: yes/no Consortia include large consortia such as NCDL, e-iNC, NC Kids, as well as any smaller regional or local agreements for electronic materials.	
G. 49.	Did the library system provide access to e-audio provided by the state library agency or another state agency at no or minimal cost to the library system?	Response options: yes/no This includes NC Live resources.	

E-video

Number	Indicator	Definition	Internal Notes
G.50.	Did the library system provide access to e-video purchased solely by the library system?	Response options: yes/no	
G.51.	Did the library system provide access to e-video purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?	Response options: yes/no Consortia include large consortia such as NCDL, e-iNC, NC Kids, as well as any smaller regional or local agreements for electronic materials.	
G. 52.	Did the library system provide access to e-video provided by the state library agency or another state agency at no or minimal cost to the library system?	Response options: yes/no This includes NC Live resources.	

E-serials

Number	Indicator	Definition	Internal Notes
G.53.	Did the library system provide access to e-serials purchased solely by the library system?	Response options: yes/no	
G.54.	Did the library system provide access to e-serials purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?	Response options: yes/no Consortia include large consortia such as NCDL, e-iNC, NC Kids, as well as any smaller regional or local agreements for electronic materials.	
G. 55.	Did the library system provide access to e-serials provided by the state library agency or another state agency at no or minimal cost to the library system?	Response options: yes/no This includes NC Live resources.	

Research Databases

Research databases are organized collections of electronic data or records (e.g., facts, abstracts, articles, bibliographic data, texts, photographs) that can be searched to retrieve information. Do not consider resources available for free when answering the following questions.

Number	Indicator	Definition	Internal Notes
G.56.	Did the library system provide access to research databases purchased solely by the library system?	Response options: yes/no	
G.57.	Did the library system provide access to research databases purchased via a consortium, cooperative, or other similar group at the local, regional, or state level?	Response options: yes/no Consortia include large consortia such as NCDL, e-INC, NC Kids, as well as any smaller regional or local agreements for electronic materials.	
G. 58.	Did the library system provide access to research databases provided by the state library agency or another state agency at no or minimal cost to the library system?	Response options: yes/no This includes NC Live resources.	

Online Learning Platforms

Online learning platforms primarily provide instruction, tools, and resources to enhance education, lifelong learning, and skill building. Platforms may offer homework assistance, language learning, test preparation, professional development, resume assistance, hobby instruction, etc. Do not consider resources available for free when answering the following questions.

Number	Indicator	Definition	Internal Notes
G.59.	Did the library system provide access to e-books purchased solely by the library system?	Response options: yes/no	
G.60.	Did the library system provide access to e-books purchased via a consortium, cooperative, or other similar group at the	Response options: yes/no Consortia include large consortia such as NCDL, e-INC, NC Kids, as well as any smaller regional or local agreements for electronic materials.	

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	local, regional, or state level?		
G. 61.	Did the library system provide access to e-books provided by the state library agency or another state agency at no or minimal cost to the library system?	Response options: yes/no This includes NC Live resources.	

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Section H: Collection Usage

What to include in collection usage:

Count annual circulation of all library materials, including renewals **and auto-renewals**. Interlibrary loans checked out to users should be included.

For questions related to young adult books, if you do not identify young adult books separately in cataloging, leave this blank, select "ILS cannot provide this data," and report circulation numbers in the category in which young adult books are cataloged.

Exclude:

Do not count intra-library loans (i.e. materials borrowed between branches) or items checked out to another library.

Book Usage By Age

Note: Pre-filled for NC Cardinal libraries.

Adult Books	Young Adult Books	Juvenile Books	Internal Notes
H. 1. Fiction	H. 2. Fiction	H. 3. Fiction	
H. 4. Non-Fiction	H. 5. Non-Fiction	H.6. Non-Fiction	
H. 7. Total Adult Books (Auto-calculated)	H. 8. Total YA Books (Auto-calculated)	H. 9. Total Juvenile Books (Auto-calculated)	

Usage By Format

Note: Pre-filled for NC Cardinal libraries.

Number	Indicator	Definition	Internal Notes
H.10.	Total book circulation	<u>This value is auto-calculated for you.</u> <i>Adult fiction + Adult non-fiction + Juvenile fiction + Juvenile non-fiction + YA fiction + YA non-fiction.</i>	
H.11.	Print periodicals circulation	If known, report the circulation of print periodicals. Note: This is pre-filled for NC Cardinal members.	
H.12.	Total print circulation	<u>This value is auto-calculated for you.</u> <i>Adult fiction + Adult non-fiction + Juvenile fiction + Juvenile non-fiction + YA fiction + YA non-fiction + Periodicals + Other print</i>	
H.13.	Analog audio circulation	Circulation of audio on cassettes, CDs, or other physical media. Note: This is pre-filled for NC Cardinal members.	
H.14.	Analog video circulation	Circulation of video on DVDs or other media. Note: This is pre-filled for NC Cardinal members.	
H.15.	Other print material circulation	Use this field only if necessary. Report the circulation for all other print materials. DO NOT track toys, puzzles, games, computer games, or	

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		other non-print materials here. These items can be tracked in “Other non-print materials.” Note: This is pre-filled for NC Cardinal members.	
H.16.	Other non-print analog circulation	Use this field only if necessary. Report the circulation of physical units for all other non-print materials. You can include microfiche, microfilms, and other microforms, puzzles, games, video games, tools, etc. Note: This is pre-filled for NC Cardinal members.	
H.17.	Total non-print circulation	<u>This field is auto-calculated for you.</u> <i>Analog Audio + Analog Video + Non-print materials</i>	
H.18.	Total physical item circulation	<u>This value is auto-calculated for you.</u> <i>Print circulation + Analog Audio + Analog Video + other print materials circulation + Other non-print analog circulation</i>	

Number	Indicator	Definition	Internal Notes
H.19.	NC LIVE eBook circulation	NC LIVE e-book circulation will be entered for you by the State Library.	
H.20.	NC Kids e-book circulation	NC Kids e-book circulation will be entered for you by the State Library.	
H.21.	e-INC e-book circulation	e-INC e-book circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.22.	NCDL e-book circulation	NCDL e-book circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.23.	Local e-book circulation	Include all non-consortial e-book circulation.	
H.24.	Total e-book circulation	<u>This is an automatically calculated value.</u> <i>NC LIVE e-book + NC Kids e-book, e-INC e-book + NCDL e-book + local e-book circulation.</i>	
H.25.	NC LIVE e-audio circulation	NCLIVE e-audio circulation will be entered for you by the State Library.	
H.26.	NC Kids e-audio circulation	NC Kids e-audio circulation will be entered for you by the State Library.	
H.27.	e-INC e-audio circulation	e-INC e-audio circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.28.	NCDL e-audio circulation	NCDL e-audio circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.29.	Local e-audio circulation	Include all non-consortial e-audio circulation.	

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H.30.	Total e-audio circulation	<u>This is an automatically calculated value.</u> <i>NC LIVE e-audio + NC Kids e-audio, e-iNC e-audio + NCDL e-audio + local e-audio circulation.</i>	
H.31.	NC LIVE e-video circulation	NC LIVE e-video circulation will be entered for you by the State Library.	
H.32.	NC Kids e-video circulation	NC Kids e-video circulation will be entered for you by the State Library.	
H.33.	e-iNC e-video circulation	e-iNC e-video circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.34.	NCDL e-video circulation	NCDL e-video circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.35.	Local e-video circulation	Include all non-consortial e-video circulation. Include usage from items reported in G.40 only.	
H.36.	Total e-video circulation	<u>This is an automatically calculated value.</u> <i>NC LIVE e-video + NC Kids e-video, e-iNC e-video + NCDL e-video + local e-video circulation.</i>	
H.37.	e-iNC e-periodicals circulation	e-iNC e-periodicals circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.38.	NCDL e-periodicals circulation	NCDL e-periodicals circulation will be entered for you by the State Library. Note: If not a member, check box.	
H.39.	Local e-periodicals circulation	Include all non-consortial e-periodicals circulation.	
H.40.	Total ePeriodicals circulation	<u>This is an automatically calculated value.</u> <i>e-iNC e-periodicals + NCDL e-periodicals + local e-periodicals circulation</i>	
H.41.	Use of Electronic Materials	Electronic Materials are materials that are distributed digitally and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. This field is auto-calculated for you. <i>NC LIVE e-book + NC Kids e-book, e-iNC e-book + NCDL e-book + local e-book circulation + NC LIVE e-audio + NC Kids e-audio, e-iNC e-audio + NCDL e-audio + local e-audio circulation + e-iNC e-periodicals + NCDL e-periodicals + local e-periodicals circulation + NC LIVE e-video + NC Kids e-video, e-iNC e-video + NCDL e-video + local e-video circulation</i>	
H.42.	NC LIVE Retrieval of Electronic Information	NC LIVE retrieval of electronic information will be entered for you by the State Library.	
H.43.	Local Retrieval of Electronic	The number of full-content items examined, downloaded or otherwise supplied to the user from online library resources that require user	

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	Information (Database usage)	authentication but do not have a circulation period. Do not include use of the OPAC or library website.	
H.44.	Total Successful Retrieval of Electronic Information	<u>This is an automatically calculated value.</u> <i>NC LIVE Retrieval of Electronic Information + Local Retrieval of Electronic Information</i>	
H.45.	Electronic content use	<u>This is an automatically calculated value..</u> <i>Use of Electronic Materials + Total Successful Retrieval of Electronic Information</i>	

Totals

Number	Indicator	Definition	Internal Notes
H.46.	Total audio circulation	<u>This field is automatically calculated for you.</u> <i>Total e-audio + analog audio circulation</i>	
H.47.	Total circulation of AV materials	This value is auto-calculated for you. <i>NC LIVE e-audio + NC Kids e-audio, e-iNC e-audio + NCDL e-audio + local e-audio circulation. + Analog Audio + Analog Video + NC LIVE e-video + NC Kids e-video, e-iNC e-video + NCDL e-video + local e-video circulation</i>	
H.48.	Total Circulation of Materials	<u>This value is auto-calculated for you.</u> <i>Total physical item circulation + Use of Electronic Materials</i>	
H.49.	Total collection use	<u>This value is auto-calculated for you.</u> <i>Juvenile fiction + Juvenile non-fiction + YA fiction + YA non-fiction + Adult Fiction + Adult non-fiction + Periodicals + analog audio + analog video + other non-print + other print + NC LIVE e-book + NC Kids e-book, e-iNC e-book + NCDL e-book + local e-book circulation + NC LIVE e-audio + NC Kids e-audio, e-iNC e-audio + NCDL e-audio + local e-audio circulation + e-iNC e-periodicals + NCDL e-periodicals + local e-periodicals circulation + NC LIVE e-video + NC Kids e-video, e-iNC e-video + NCDL e-video + local e-video circulation + NCLIVE Successful Electronic Retrievals + Other Successful Electronic Retrievals</i>	
H.50.	Circulation of children's materials	Total annual circulation of juvenile and young adult physical materials to all users. Include renewals.	
H.51.	Automatic Renewal of Physical Materials	Did your library offer automatic renewal for any physical materials during the reporting period? NOTE: Patrons do not have to take any action for automatic renewals. The Integrated Library System [ILS] rules determine how/when automatic renewals occur. Response options: Yes/No	

H.52.	Current Overdue Fine Policy	As of the end of the reporting period, does the library charge overdue fines to any users when they fail to return physical print materials by the date due? NOTE: Overdue fines are monetary penalties that typically increase according to the number of days the materials are overdue. Overdue fines are <u>not</u> replacement costs for lost or damaged materials.	
H.53.	Adult Fines	Does the library collect late fines for adult materials? Do not include lost/damage fees. Yes/No	
H.54.	YA Fines	Does the library collect late fines for young adult materials? Do not include lost/damage fees. Yes/No	
H.55.	Juvenile Fines	Does the library collect late fines for juvenile materials? Do not include lost/damage fees. Yes/No	
H.56.	A/V Fines	Does the library collect late fines for audio-visual materials? Do not include lost/damage fees. Yes/No	

Technology Lending

Technology lending is a sub-section of circulation to capture how libraries facilitate access to technology items. Circulation reported here should also be reported in other non-print analog circulation.

Number	Indicator	Definition	Internal Notes
H.56.	Technology circulation	Report circulation, including in-house use, of technology lent by the library to patrons (not to staff). For example: e-readers, tablets, laptops, iPods. Include renewals if possible. Do not count: circulation of non-technology items (such as gardening tools) here. headphones or cable lending. usage of stationary desktop public access computers in this statistic.	
H.57.	Method of data collection: tech lending	Please provide information on the data collection method you used to determine Technology Lending. Response options: Counted every transaction, all year; Sampling (counted manually for one week); Other	
H.58.	Does your library lend laptops or tablets?	Yes, in-house and outside use/Yes, in-house use only/No	
H.59.	Does your library lend Wi-Fi hotspots?	Yes/No	

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Section I: 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.

Number	Indicator	Definition	Internal Notes
I.1.	Adults	Number of adult (18+) cards that have had activity within the last 3 years. Note: This is pre-filled for NC Cardinal members.	
I.2.	Juveniles (non-student cards)	Number of juvenile (0-17) cards that have had activity within the last 3 years. Do not include student cards in this field. Report student cards in I.4. Note: This is pre-filled for NC Cardinal members.	
I.3.	Total Registered users	<u>This is an automatically calculated value.</u>	
I.4.	Does your library offer student cards to one or more k-12 schools in your area?	Select the response that applies: Yes, authentication by student ID or Yes, other authentication/No	
I.5.	Student library cards	Report the number of library cards automatically generated based on student enrollment. Enter -1 if your library does not provide automatically generated student library cards.	

Visits

How to sample if gate counts are unavailable:

If an annual count of persons entering library is unavailable, determine an annual estimate by sampling visitation quarterly by tracking visitation during a typical week and multiplying by 13.

A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, 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. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open).

Number	Indicator	Definition	Internal Notes
I.5.	Library visits	Report the total number of persons entering the library for whatever purpose during the year. Include persons attending activities, meetings, and those persons requiring no staff services	

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I.6.	Method of data collection: library visits	Regarding the number of Library Visits entered, is this an annual count or an annual estimate based on a typical week or weeks? Select one of the following: Annual Count Annual Estimate Based on Typical Week(s)	
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Section J: Programming

What to include:

A program is any planned event which introduces the group attending to any of the broad range of library services or activities, or which directly provides information to participants. Programs may also provide cultural, recreational, or educational information, often designed to meet a specific social need. They are sponsored or co-sponsored by the library.” To be considered a program, an event must have the following characteristics:

- A specific date and time
- Led by library staff or person invited by the library to present information
- Intended for group participation

Exclude:

Do not include events where interaction is one-on-one or ad-hoc such as booths at festivals, school nights, farmers markets, etc. even if the festival is sponsored or hosted by the library. *

*If the library presents a story time or other group activity as part of a festival, that specific event and its attendees should be counted as a program. Do not report attendance that is equal to the festival attendance.

Categorize programs according to the intended audience. Include all attendees regardless of age.

Synchronous (Live) Programs

The questions in Section J, reflect new age categories adopted in FY21 and the addition of a general interest category.

In-Person Programs Offered

The following guides have been created to help determine what counts as a virtual program and how to track attendance based on platform:

[What counts as a program?](#)

	Children's (0-5)	Children's (6-11)	Young Adult (12-18)	Adult (19+)	General Interest	Internal Notes
Onsite	J.1.	J.2.	J.3.	J.4.	J.5.	
Offsite	J.6.	J.7.	J.8.	J.9.	J.10.	
Live Virtual Programs	J.11.	J.12.	J.13.	J.14.	J.15.	
Totals	J.16.	J.17.	J.18.	J.19.	J.20.	

In-Person Program Attendance

	Children's (0-5)	Children's (6-11)	Young Adult (12-18)	Adult (19+)	General Interest	Internal Notes
Onsite	J.21.	J.22.	J.23.	J.24.	J.25.	
Offsite	J.26.	J.27.	J.28.	J.29.	J.30.	
Live Virtual Programs	J.31.	J.32.	J.33.	J.34.	J.35.	
Totals	J.36.	J.37.	J.38.	J.39.	J.40.	

Synchronous (Live) Program Totals

Number	Indicator	Definition	Internal Notes
J.41.	Total Programs	<u>This is auto-calculated for you.</u>	
J.42.	Total Attendance	<u>This is auto-calculated for you.</u>	

Asynchronous (on-demand) or Pre-recorded Events

Number	Indicator	Definition	Internal Notes
J.43.	Total Number of Asynchronous Program Presentations	Asynchronous program presentations are recorded videos or audio of program content that are posted online for downloading or on-demand viewing (rather than livestreaming). Only include program presentations posted during the reporting period. Include live program sessions that are recorded and posted online. Count each unique video or audio recording only once regardless of the number of platforms on which it is posted. Do not duplicate numbers at each branch; count only at the administrative entity level.	
J.44.	Program presentation views within 30 days	Report the count of views or plays of asynchronous program presentations for a period of thirty (30) days after the presentation was posted, even if that period extends beyond the survey reporting period (or fiscal year). For program presentations made available via Facebook, count unique 1-minute views of each video. For other platforms, count unique views or plays of each video or audio recording. For program presentations made available via Facebook, count unique 1-minute views of each video. For those made available via	

		other platforms, count unique views of each video. <u>Include views for program presentations that are recordings of synchronous live virtual program sessions, exclude synchronous (live) attendance which should be counted under Synchronous In-Person Onsite Program Attendance, Synchronous In-Person Offsite Program Attendance, or Synchronous Virtual Program Attendance.</u>	
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Programs offered by topic

Number	Indicator	Definition	Internal Notes
J.45.	Jobs/career	Does the library offer job or career related programming? Yes/No, not at this time	
J.46.	Technology	Does the library offer technology related programming? Yes/No, not at this time	
J.47.	Early Literacy	Does the library offer early literacy related programming? Yes/No, not at this time	
J.48.	Adult Literacy	Does the library offer adult literacy related programming? Yes/No, not at this time	
J.49.	STEAM	Does the library offer STEAM related programming? Yes/No, not at this time	

Consultations

Number	Indicator	Definition	Internal Notes
J.50.	Job/Career Consultations	Does your library offer one-on-one consultations with library staff for job/career assistance? Yes/No	
J.51.	Technology Consultations	Does your library offer one-on-one consultations with library staff for technology assistance? Yes/No	

Summer Learning Program (June 1 - August 31, 2025)

Number	Indicator	Definition	Internal Notes
J.62.	What methods did the library use to offer summer reading program events?	Primarily Virtual, Primarily in-person, other	

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J.63.	Did the library distribute summer reading activity packets?	Activity packets are a collection of curated literacy activities for self-paced completion. Activities can include things such as reading lists, games, crafts, etc.	
J.64.	Library staff did school/daycare visits to advertise the SRP		
J.65.	What is the primary method used to track summer reading participation?	Manual Tracking/Read Squared via the State Contract/Other Online Tool/Other	
J.66.	Number of juvenile books circulated.		
J.67.	Number of young adult books circulated.		

Summer Learning Program Participation

	Birth – 5	6-12	13 -18	Internal Notes
Registrants	J.68.	J.69.	J. 70.	
Events/Programs	J.71.	J.72.	J.73.	
Attendees	J.74.	J.75.	J.76.	
Minutes Read	J.77.	J.78.	J.79.	

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Section K: Other Services

Patron Assistance

Types of assistance to include:

Include information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs.

Include Readers Advisory, information and referral service, unscheduled individual instruction, and assistance in using information sources (including websites and computer-assisted instruction).

Exclude:

Do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements.

Do not include transactions that include only a directional service, such as instruction for locating staff, library users, or physical features within the library. Examples of directional transactions include:

- “Where is the reference librarian?”
- Where is Susan Smith? Where is the rest room?
- Where are the 600s?
- Can you help me make a photocopy?”

If a contact includes both reference and directional services, it should be reported as one reference transaction.

How to sample if an annual count is unavailable:

If an annual count of persons entering the library is unavailable, determine an annual estimate by sampling visitation quarterly by tracking visitation during a typical week and multiplying by 13.

A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, 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. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open).

Number	Indicator	Definition	Internal Notes
K.1.	All transactions ("reference transactions")	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.	
K.2.	Method of data collection	Regarding the number of Patron Assistance counts entered, is this an annual count or an annual estimate based on a typical week or weeks? Select one of the following: Annual Count Annual Estimate Based on Typical Week(s)	

Meeting Room Use

Number	Indicator	Definition	Internal Notes
K.3.	Meeting room use (non-library)	Number of events held in library meeting rooms for functions not sponsored, organized or initiated by the library.	
K.4.	Meeting room attendance (non-library)	Attendance at events held in library meeting rooms for functions not sponsored, organized or initiated by the library.	

Interlibrary Loans

Library materials, or copies of the materials, provided by one library to another upon request. The libraries involved in interlibrary loans are not under the same library administration.

Do not count "branch to branch" loans as interlibrary loans.

Note: This is pre-filled for NC CARDINAL libraries.

Number	Indicator	Definition	Internal Notes
K.5.	Items loaned (items provided to)	The annual count of library materials, or copies of materials, provided by one library to another upon request. NOTE: This is pre-filled for NC Cardinal members.	
K.6.	Items borrowed (items received from)	The annual count of library materials, or copies of materials, received by one library from another upon request. NOTE: This is pre-filled for NC Cardinal members	

Partnerships

Designate which type of partnership you have with each of the listed types of organizations.

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

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

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

Number	Indicator	Definition	Internal Notes
K.7.	K-12 Schools		
K.8.	Higher Education Organization(s)		
K.9.	Local Employment Office		
K.10.	Local Health and Human Services Department		
K.11.	Local Parks and Recreation Department		
K.12.	Other local governmental department(s)		
K.13.	Economic development organization(s) (i.e. Chamber of Commerce)		
K.14.	Local Private-sector Business(s)		
K.15.	Local Health Organization(s)		
K.16.	Local Faith Organization(s)		
K.17.	Local Agricultural or Environment Organization(s)		
K.18.	Other local organization(s) focused on youth		
K.19.	Other local organization(s) focused on adults		

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Section L: Electronic Technology

Computers

Number	Indicator	Definition	Internal Notes
L.1.	Internet computers used by staff only	Report the number of the library's Internet computers (PCs and laptops) used by staff only. If both the public and staff use a computer, count it as a public computer.	
L.2.	Internet computers used by general public	REVISION: Report the number of the library's Internet computers [personal computers (PCs), laptops, and tablets], whether purchased, leased, or donated, used by the general public in the library. Do not include computers that connect to the Internet for a dedicated purpose (e.g., to access an OPAC or specific database, or to train the public) or purposes.	

Usage

Number	Indicator	Definition	Internal Notes
L.3.	Number of uses of public Internet computers per year	Report the total number of uses (sessions) of the library's Internet computers in the library during the last year. If the computer is used for multiple purposes (Internet access, word-processing, OPAC, etc.) and Internet uses (sessions) cannot be isolated, report all usage. A typical week or other reliable estimate may be used to determine the annual number. Sign-up forms or Web-log tracking software also may provide a reliable count of uses (sessions). Note: The number of uses (sessions) may be counted manually, using registration logs. Count each use (session) for public internet computers, regardless of the amount of time spent on the computer. A use (session) on the library's public internet computer(s) three times a year would count as three uses (sessions). Software such as "Historian" can also be used to track the number of uses (sessions) at each public internet computer. If the data element is collected as a weekly figure, multiply that figure by 52 to annualize it.	

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		Reminder: This count includes only the library's Internet computers. Do not include Wi-Fi access using non-library computers.	
L.4.	Method of data collection: public internet computer use	Use the drop-down menu to select the method by which you gathered data about public Internet computer use (Computer software provides the count, Sign up on paper sheets, Sampling, Other).	
L.5.	Website visits	Count the number of visits, also called "sessions," to the library's website. DO NOT REPORT the number of page hits or pageviews. A "visit" or "session" represents a person coming to your site regardless of how many pages they view while there. If you are unable to count the number of visits or sessions to your website, select "Not able to track."	
L.6.	Wireless Internet sessions	Report the number Internet sessions initiated on your library's wireless network during the fiscal year in question. It doesn't matter who is using the wireless, what time of day it is, whether it's during the library's opening hours, or what websites the user is accessing. This number can only be reported if your wireless internet provider can give you the number, or if you have staff members who know how to get the number from the router. Do not attempt to get this number by sampling observations of people in the library using their own laptops. Select "N/A" if you are not able to get the number from the router or internet provider, or if your library does not provide wireless internet.	
L.7.	Method of Collection: Wireless internet sessions		

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Section M: Branch Information

Outlet Collection

Number	Indicator	Definition	Internal Notes
M.1.	Name of branch	<u>Pre-filled.</u> Name of the branch library or outlet	
M.2.	Does the library branch have a dedicated Friends Group?	Response options: Yes, a 501c3 registered Foundation; Yes, a Foundation that is not a registered 501c3; No, the library system does not have a Foundation	
M.3	Does the library branch have a dedicated Foundation?	Response options: Yes, a 501c3 registered Friends Group Yes, a Friends Group that is not a registered 501c3; No, the library system does not have a Friends Group	

Facilities

Number	Indicator	Definition	Internal Notes
M.4.	Is this facility owned or leased?	<u>Pre-filled.</u> Specify if the facility is city owned, county owned, leased, or other.	
M.5.	Year Built	Provide the year the facility was originally constructed. For bookmobiles, use the vehicle's model year rather than the year purchased.	
M.6	Year of last remodel	The most recent year that a substantial modification to the building was completed, for example "2018". Substantial modification means that the remodeling involved 1) structural changes, 2) the services of a licensed architect, and/or 3) a cost of \$100,000 or more.	
M.7	Condition of the facility	Assess the adequacy of the library facility in terms of the size and condition of the building.	
M.8	Facility upgrade needs	Using one of the options provided, indicate whether this facility needs some level of upgrade. Remodel Expansion Remodel and Expansion Replace N/A – Not Applicable	
M.9	Number of reservable meeting spaces (10 or more) for public use	Provide the number of reservable meeting spaces that can hold a capacity of 10 or more people and are available for public use. Spaces may be reserved on a first come first serve basis or pre-arranged. Include spaces that accommodate less than 10 in study spaces.	

M.10	Number of reservable small group (9 or less) spaces for public use	Provide the number of reservable spaces that are available for small groups (no more than 9 people). Spaces may be reserved on a first come first serve basis or pre-arranged. Include spaces that accommodate 10 or more people in meeting rooms.	
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Contact

Number	Indicator	Definition	Internal Notes
M.13-17.	Mailing Address	Administrative entity's mailing address. If your mailing address has changed since last year, please contact Amanda Johnson, Amanda.johnson@dn-cr.nc.gov .	
M.18-22.	Street Address	The complete street address of the administrative entity or outlet. If your street address has changed since last year, please contact Amanda Johnson. Note: Do not report a post office box or general delivery.	
M.23.	Phone number	<u>Pre-filled.</u> The telephone number of the branch, including area code. Report telephone number without spacing or punctuation.	
M.24.	Fax number	<u>Pre-filled.</u> The fax phone number of the branch (if available), including area code. Report fax number without spacing or punctuation.	
M.25.	Branch head	<u>Pre-filled.</u> The name of the person responsible for on-site management of the branch. The person who fills this role may not have the title "branch head" or "librarian". Report the name of the person who oversees staff and facilities at the branch, regardless of his or her job title.	
M.26.	Email address	<u>Pre-filled.</u> The complete email address of the person named above as branch head above, or the email address for the branch itself. If neither the branch nor the branch head has an email address, leave this field blank or "N/A."	

Counts

Number	Indicator	Definition	Internal Notes
M.27.	Building square footage	<u>Pre-filled.</u> Provide the area, in square feet, of the public library outlet (main library or branch). Report the total area in square feet for each library outlet (main library or branch) separately. This is the area on all floors enclosed by the outer walls of the library outlet. Include all area occupied by	

		the library outlet, including those areas off-limits to the public. Include any areas shared with another agency or agencies if the outlet has use of that area.	
		Note: If the outlet is a bookmobile, select “N/A.”	
M.28.	FTE staff	Total full-time equivalents of staff assigned to this outlet. Include all positions assigned to the outlet, whether those positions are filled or not. To compute FTE, take the number of hours worked per week by all employees and divide it by 40. Example: four employees working 12 hours per week would be considered 1.2 FTE (4 x 12/ 40 = 1.2)	

Hours

Number	Indicator	Definition	Internal Notes
M.29.	Hours of operation	Enter the library's regular weekly schedule here. You may also include summer or other special hours. Examples: M-F: 8: 00 a. m. -5: 00 p. m. or T-Th: 2-8 pm; F: noon-5 pm; Sat: 9 am-noon; Sun: 2-5 pm (Labor Day - Memorial Day). These hours of operation will display publicly on an interactive map of NC libraries produced by the new survey tool, so be sure to enter your updated hours each year.	
M.30.	Public service hours per year	This is the number of annual public service hours for outlets (reported individually by central, branch, bookmobile and Books by Mail Only). For each bookmobile, count only the hours during which the bookmobile is open to the public. For administrative entities that offer ONLY books by mail service, count the hours that the outlet is staffed for service. Minor variations in public service hours need not be included. Extensive hours closed to the public due to natural disasters or other events should be excluded from the count.	
M.31.	Number of weeks library outlet is open	This is the number of weeks during the year that an outlet was open to the public. For each bookmobile, count only the weeks during which the bookmobile is open to the public. For administrative entities that offer ONLY books by mail service, count the weeks that the outlet is staffed for service. The count should be based on the number of weeks that a library outlet was open	

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		for half or more of its scheduled service hours. Extensive weeks closed to the public due to natural disasters or other events should be excluded from the count. Do not calculate based on total number of service hours per year at the outlet level. For example, by dividing total hours by the average hours open per week. Round to the nearest whole number of weeks. If the library was open half or more of its scheduled hours in a given week, round up to the next week. If the library was open less than half of its scheduled hours, round down.	
M.32.	Was this facility closed unexpectedly for more than 1 week within the last year? If yes, please note how many weeks the closure lasted and a brief explanation of circumstances.	Select: Yes/No	

ID

Number	Indicator	Definition	Internal Notes
M.33.	Unique ID suffix assigned by WebPLUS (IMLS)	This field is prefilled for you.	
M.34.	State assigned identification number	This field is prefilled for you.	

Codes

Number	Indicator	Definition	Internal Notes
M.35.	Outlet type code	This field is prefilled for you.	
M.36.	Number of bookmobiles	This field is prefilled for you.	
M.37.	Metropolitan status code	This field is prefilled for you.	

Internet

How to determine speed:

1. From a public computer in the library, open a web browser and go to <http://speedtest.net>
2. Wait a few seconds for the site to load then click on the link to Begin Test. Don't click "Start now"; that does something else.
3. The test will begin and will take approximately 20 seconds to complete

4. It will return both a download and an upload speed to you. Use these numbers to respond to questions survey questions about Download and Upload speed.

Number	Indicator	Definition	Internal Notes
M.38.	Broadband speed (upload)	Report the actual speed using a public computer before the library is open to the public.	
M.39.	Number of bookmobiles	Report the actual speed using a public computer before the library is open to the public.	
M.40.	Wireless Internet provided	Does your outlet provide wireless Internet service? Select an answer, Yes or No	

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