



New Mexico State Library
Library Development Services Bureau

Public Library Survey Guide

(Annual Report and State Grants- in-Aid Application)

- The New Mexico State Library (NMSL) participates in the national Public Library Survey (PLS) operated by the Institute of Museum and Library Services (IMLS) and compiled by the American Institute for Research (AIR).
- The data collected is used at various levels for planning, evaluating and budgeting.
- Better known as the Annual Report, the PLS serves as New Mexico's public libraries application for state grants-in-aid. State grants-in-aid eligibility is governed by New Mexico Administrative Code (NMAC) 4.5.2.
- The data entered must be accurate and based on records maintained by the library director and local financial entities.
- Collected and entered data should cover the previous fiscal year activities (July 1- June 30).
- To see the definition for each question, click the gray circle with a question mark, which is next to each question text box. A pop-up will appear with the corresponding definition.
 - *Adherence to definitions is important to ensure comparability of data from different libraries and states.*
- Estimates are important if exact data are not available. If an exact figure is not available, but you know the total is greater than zero, enter a best estimate *if you would be comfortable using the estimate*. If not, enter N/A.
- Enter "0" only if the actual answer is truly zero or none and enter "N/A" if the figure is not available and an estimate is not available.
- As information is entered, please enter detailed notes on any answer that is vastly different from the previous year or if using estimates, etc. Providing detailed and useful notes is extremely helpful and appreciated. Inputting notes that do not reflect the issue is not acceptable.
- Federally required questions are in navy font and all other questions are in black font.
- For technical questions, contact Bibliostat Collect, toll free 1-866-785-9935, or by email bibliostat@btol.com
- For questions about the annual report or about definitions, contact State Data Coordinator Carmelita Aragon at (505) 476-9740, 1-800-340-3890 or by email at Carmelita.Aragon@state.nm.us

Getting Started

Using a preferred web browser, access Bibliostat Collect <https://collectconnect.baker-taylor.com/login.aspx> and login using the library's username and password - Username & Password stay the same each year.

- Click *Start Survey* next to the current year's NM Public Library Annual Report. Be aware of the 90-minute timeout period (information is saved when session times out).
- Federal questions are in **navy** font, while all other questions are in **black** font. This will help differentiate which tab to use when a note is required. Navy question – Federal tab, black question – State or Local tab. Bibliostat Collect defaults to the Federal tab.
- Click *SAVE* before navigating to the next page. Many auto totals will only calculate once *SAVE* is selected. It is also useful in case something happens to the Internet service, etc.
- Using the *SHOW LAST YEAR'S ANSWERS* (upper right of survey) feature while completing the survey may be useful. If current year data is significantly different from previous year data, or is very similar, a detailed note must be entered in the applicable note tab (Federal, State, Local).
 - To view any notes that were left in the previous year, click the *NOTE* icon and select the *PREVIOUS YEAR* tab.
- View the library's Survey List, Frequently Asked Questions (FAQ), and Instructions, using the navigation bar toward the top of the page.
 - The *Show Status* tab is useful to review any Edit Checks, Unanswered Questions, and Flagged Questions.
 - The *Print* icon allows printing of the entire survey or printing of a selected section in PDF or HTML format. There is an option to print with or without the current year's data, and with or without the previous year's data. Annotation Reports can also be printed to review notes left on questions.
- When returning to the survey, click *Continue*.
- Once the survey is complete, print or save a copy for the library's records before electronically submitting the survey.

Finalizing and Submitting the Survey

When clicking the *Submit* button, Bibliostat Collect does 3 things:

1. Checks and lists any unanswered questions.
2. Reviews all Flagged questions and Edit Checks to ensure they have been corrected and/or that an appropriate note (Federal or State) has been provided.
3. Once finalized, Bibliostat Collect locks the survey so the integrity of the data is protected.

Bibliostat Collect will not allow submission of the survey until all required questions have been answered and all edit checks have been adequately addressed. Click on *Show Status* to review any *Edit Checks*, *Unanswered Questions* and/or *Flagged Questions*. Once all questions have been reviewed and answered, the survey is ready to submit. It is recommended that you print or save a copy before hitting submit.

If access to the library's survey is needed after submission, contact the State Data Coordinator at the New Mexico State Library for assistance. View a printable copy of the submitted survey by logging in, clicking *Survey List* and selecting the survey print icon.

Edit Checks

- Edit Checks alert to responses that are not within set parameters when compared to state or national norms. Edit checks only appear if the data entered is outside a specified range. The question will appear with the reason in red and will ask for review. Notes left should clearly reflect the issue.
- If the data is incorrect, simply correct the data in the entry box. If the edit check is on a question with an automatic total and the figure is wrong, change the data in the corresponding question(s).
- Once the data is within a specified range (after clicking *Save*), the edit check will disappear. If the data in the entry box is correct, leave a note using the note icon to annotate the response. Notes should be specific and clearly reflect the issue. When noting a correct response using the note icon and after clicking *Save*, the edit check message will turn green. If the edit check remains, ensure the note was left in the appropriate note tab (Federal = Navy Blue question or State = Black question).
- To get back into the survey, click *Continue*.

Unanswered Questions

- If any questions remain unanswered, simply enter the missing data.

Flagged Questions

- Use the flag feature to revisit a question after gathering more information. To view the list of flagged questions, go to the *Show Status* tab and click on the *Flagged Questions* tab. When the question has been adequately, re-click the flag icon to unmark the question.

Important Information

Federally required questions are in **navy** font and all other questions are in **black** font. This helps when leaving notes using the *NOTE* icon.

Auto-Totals: Questions with shaded gray answer boxes are automatic totals calculated from answers supplied in previous fields. The only way to change these totals is to change the responses in the corresponding fields. Corresponding questions appear in parentheses, e.g., (E01 + E02 + E03).

Blank Answers: All fields must contain data before the survey can be submitted. If a question does not apply to the library, or the library does not have an accurate way of maintaining the data in a question, enter N/A. Entering a "0" is only acceptable if the answer is truly zero.

Edit Checks: As data is entered, it is being "edit checked". Bibliostat Collect will alert if the data is out-of-range, has an arithmetic error, or is outside a range from last year's data. Most edit checks are based on the library's previous year's responses. If receiving an edit check message, review the data for accuracy. If the data is correct, click on the note icon and leave a detailed note in the appropriate tab (Federal or State). Explain why the number is correct and be specific (e.g., we received a one-time \$3,000 grant this year).

Estimates: If an exact figure is not available, using an estimate is acceptable. However, an estimate should involve a reasonable method to derive a result to use in place of an exact count. Using last year's figure is *not* an estimate. *If* using an estimate, explain the method by adding a note using the note feature.

FAQ: If there are questions about the survey, viewing the FAQ may provide further information.

Flag Feature: This is useful when a question requires further research. Clicking the flag will highlight the icon to then remind you later that more information was needed, etc.

Help: To view more detailed information about a question, click the grey circle with a question mark next to each text box or consult the Instructions page.

Notes: Notes are useful to explain any differences in the library's data. If there is a significant change in the current year's data from the previous year's data, a note is necessary to explain the difference. Click on the note icon to the right of each question to add a note in the appropriate tab. Notes should be specific, written clearly, and should clearly reflect the issue. **Using the note feature helps the State Data Coordinator with reviewing all recognized public libraries data from 150+ questions for accuracy, and clarity. If notes are not left, it requires a phone call and/or email to clarify any data discrepancies. Placing detailed notes that accurately reflect the issue saves everyone time!**

Recorded Webinars/Training Videos: See the state library website (nmstatelibrary.org → [Services for Libraries](#) → [Development Bureau Webinars and Trainings](#)) for recorded annual report webinars and short training videos.

Section K (Tribal Library Program Grants Expenditure): *Only* tribal public libraries should have data stored in this section. If the library is not a tribal public library these fields should remain blank. There is no need to enter N/A if the library is not a tribal public library.

Section L (Outlet Information): Each library has at least one outlet, the main library. If a library has an eligible branch, that's another outlet. Therefore, if there is one main library and one eligible branch, there are two outlets. The main library's information is prefilled as well as most of any eligible branch(es) information. Review all information to ensure its accuracy. *If the library does not have an eligible branch there is no need to enter information in the Branch section.*

Outlets can be removed or added by clicking "Remove Group" or "Add Group" (a group is an outlet) at the bottom of the screen.

Section M (State Library Additional Questions): Answering these questions is required, as the State Library uses this information to establish benchmark data and assist with various state projects, etc.