Appendix: Survey Documentation for Vendor Demonstrations

Vendors are expected to provide a demonstration of a sample set of Public Libraries Survey questions. This appendix provides documentation on the content and data validation required to build such a sample demonstration.

The annual Survey includes about 100 federally required questions for each library system and another approximately 20 federally required questions for each of the library system’s outlets. Using the attached documentation, **vendors should select whatever sample of questions allows them to demonstrate the minimum required features of the product**, and additional features as desired.

(Each year’s Survey also includes questions added by the state, but the vendor demonstration for this Request need only address federal questions.)

# Survey documentation details

Survey content changes somewhat each year, with questions (“data elements”) and definitions added, dropped or changed. Each year the federal government releases updated documentation about data elements, definitions, data validation and other survey details, so that states or their vendors can build the Survey collection instrument.

The most recent year for which all such documentation is available is for the 2023 Survey. Vendors should use this documentation for demos. Following this Appendix, please find,

* *FY 2023 PLS Users Guide 508C* (lists all questions and definitions, by federal question number and variable acronym, and provides other overall details about the survey)
* *PLS FY 2023 Import and Edit File Memo\_Final* (a narrative describing changes from the Previous Year survey)
* *FY 2023 PLS Import Specs\_Final* (describes specific requirements for certain fields, listed by variable acronym)
* *FY 2023 PLS Edit Check Changes\_Final* (lists changes to edit checks, all edit checks; refers to questions by variable acronym)

# The role of “edit checks”

Each survey question has particular data validation (“edit checks”) specified by the federal government or requested by the state. Edit checks flag entries that seem out of range compared with previous-year entries or other current-year entries, or that use improper data types. Some edit checks block submission of the survey until the response is changed (“critical” edit checks), while others simply require the response to be explained in an annotation (“non-critical” edit checks). Each responding library must address all edit checks in order to submit the survey to the State Library. The State Library must then resolve the edit checks in order to submit to the federal government. Thus, the better edit checks work on individual surveys, the more quickly and effectively the State Library can prepare data for submission to the federal government.

# Reminder: Required vs additional features

The demonstration should feature a sample of questions where the State Library can see required features from this Request. These include,

* Manual data entry
* In-survey (same-page) definitions, instructions & embedded help content
* Read-only fields
* Embedded Previous Year responses
* Auto saving
* Auto totaling
* Printing and exporting
* Ease of use
* Attractive interface that can embed text, pictures
* Status report page for each responding library
* Edit checks including,
  + Wrong data type
  + No data
  + Mismatch between totals and component entries
  + Historic (comparison between Previous Year and Current Year)
  + Current (entries for different questions seem contradictory, incompatible or out of range)
* Blocked submission for under-annotated or non-resolved critical edit checks.
* Administrative features for State library: Dashboard of all library entities responding, testing site, ability to immediately export responses

The State Library understands that certain required features (e.g., prefilled fields, browser/hardware compatibility, security/privacy/accessibility compliance) may not be easily demonstrated, and may be addressed in other ways.

Vendors may demonstrate other additional/optional features as desired.