

# *Massachusetts*

Library Services and Technology Act

**Long Range Plan 2003-2007**

Evaluation

*Submitted to the Institute of Museum and Library Services*

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## **Introductory Statement and Summary of Impact of IMLS Funds to Support State Library Services**

LSTA funds have had an enormous and positive impact on library services in Massachusetts over the last four years. With the support of LSTA funds and the prudent management of these funds by Massachusetts Board of Library Commissioners staff and project consultants, the MBLC has been able to make significant progress toward the six goals outlined in its 2003-2007 Long-Range Plan.

Broadly, LSTA funds have enabled the MBLC to expand and refine services to libraries on many fronts through an expansion of technology offerings, guaranteeing a core set of technology resources to the residents of Massachusetts; the implementation of train-the-trainer sessions across the state in various competencies; education about outcome-based evaluation techniques; and the creation of several new grants that respond to the changing demographics of Massachusetts as well as the expressed needs and recommendations of diverse libraries and systems.

The specific impact of LSTA funds on library services in Massachusetts is illustrated in cities such as Milford. The Milford Town Library, an FY04 Information Literacy grant recipient, defined two outcomes for its Information Literacy project that targeted Milford's adult population. Project managers exceeded the intermediate outcome they defined, that 80% of participants be able to successfully locate library materials in the online catalog with 75% accuracy, and fell just short (by 1%) of their long-term goal, that 80% of participants be able to identify reliable, objective, accurate, and current information resources for professional and personal needs with 75% accuracy. The success of this program demonstrates not only the power of this specific LSTA grant to impact the information literacy of library patrons but also the increasing comfort of librarians in applying outcome-based evaluation tools to their projects.

The growing familiarity of Massachusetts librarians with outcome-based measures results from the increased comfort of the MBLC staff with OBE, resulting from their participation in several LSTA-funded trainings with Rhea Rubin over the last five years. As a result of this training, MBLC consultants and staff regularly disseminate information about OBE in grant information sessions and site visits, and outcome-based evaluations have become a standard component of many LSTA grants awarded by the MBLC.

LSTA funds have also played an important role in allowing the MBLC to create new programs in response to input from its statewide advisory group. For instance, in 2005, after discussions with representatives serving youth ages 12-18, it became clear that the MBLC needed to respond to libraries that sought to provide programs and services for this age group, hence the creation of the "Serving Tweens and Teens" mini-grant program. More than 32 libraries wrote

letters of intent and 17 submitted proposals; in July 2006, 11 were chosen for funding. The outpouring of interest in this program testifies to both the great financial need libraries face in meeting the needs of underserved youth who congregate in the few public places available to them and the necessity for the MBLC to respond to this need with the creation of new and innovative grant programs.

But we believe that the big story in Massachusetts libraries in the last four years is in changed attitudes towards customer service and in the incredible expansion of resource sharing. Both are enabled by LSTA through Customer Service, Community Languages, Reader's Advisory and Digitization projects and through systems support for the resource sharing networks, where the number of interlibrary loans (as network transfers, virtual catalog and peer-to-peer loans via email templates) has almost doubled (99.7%) over the last five years. Indeed, Massachusetts has now reached a point where the delivery system can no longer sustain this traffic without systemic change and significantly more statewide coordination. We are, in a sense, victims of our own success.

Without the continued support of federal dollars, which represent almost 12% of the non-construction related funds used to meet the wide-ranging and ambitious goals of the MBLC, continued expansion and refinement of library services in Massachusetts would be compromised. IMLS funds are critical to the continued health and vitality of Massachusetts libraries and the ability of the MBLC to anticipate and respond to the needs of libraries, as well as initiate growth in areas where need is rising.

*Library Services and Technology Act  
Massachusetts Long Range Plan 2003—2007*

***Evaluation at a Glance***

**MISSION STATEMENT**

To provide every resident of Massachusetts with equal opportunity to access information resources that will satisfy individual educational, working, cultural, and leisure-time needs and interests, regardless of an individual's location, social or physical condition, or level of intellectual achievement.

**STRATEGIES FOR IMPLEMENTATION**

- **Statewide Programs**  
Federal funds may be used to support statewide programs and services which have broad impact; libraries of all types will benefit either directly or indirectly; the MBLC may enter into a contract with a vendor, regional library system, or automated resource sharing network to carry out the intent of a specific goal.
- **Publications**  
Material published in print and electronic format to further the mission of the library community and library development; includes policies, statistics, survey instruments, professional information, planning documents, newsletters, and brochures or other publications such as public relations material which would carry out the intent of a specific goal.
- **Institutes**  
In-depth, multi-session programs featuring a combination of presentations and working sessions on selected topics based on library needs and interests; designed by MBLC staff working with an advisory committee; attendance limited to a specified number of participants; may be offered in a central location or in more than one region; e.g. Science Reference Institute, Health Reference Institute.
- **Direct Grants**  
Letters of Intent Received from eligible applicants: 767  
Number of Applications Received: 363  
Number of Awards Given: 329  
Number of people served: 6,427,801 (services by type exceed this 2002 U.S. Estimated Census figure)  
Amount of money awarded: \$5,705,701

**DIRECT GRANTS**

<b>After School/Before School Reading – Goal 4, Objective 1.</b> To foster reading ability and an appreciation of children’s literature, projects may include programming, extended hours for school libraries, but must include at least 15 minutes of actual reading time after (or before) school.		
Awards: 10	Total Amount: \$97,5000	# People Served: 1,141
<b>Community Languages—Goal 5, Objective 2.</b> To augment current collections either in other languages, the development of English for Speakers of Other Languages materials, and materials designed for persons with disabilities.		
Awards: 31	Total Amount: \$577,860	# People Served: 711,802
<b>Customer Service—Goal 2, Objective 1.</b> To help libraries design a customer service campaign that will reaffirm good library service and the library's value to the community.		
Awards: 37	Total Amount: \$278,584	# People Served: 17,863
<b>Digitizing Historical Resources—Goal 1, Objective 3.</b> To provide access to historically valuable library resources by creating digital images and making them available through the Internet.		
Awards: 8	Total Amount: \$208,416	# People Served: 2,390,809
<b>Discovery Kits—Goal 4, Objective 2.</b> To develop kits containing materials in all formats, on major topics that would be studied in the classroom or in special programs. This program, though targeting school and public libraries and their interaction with students, could also be used in outreach efforts to other populations.		
Awards: 24	Total Amount: \$178,297	# People Served: 177,042
<b>Early Childhood—Goal 4, Objective 3.</b> To develop collections and a series of programs that promote the skills which provide the foundation for early learning.		
Awards: 7	Total Amount: \$80,000	# People Served: 1879
<b>Information Literacy—Goal 3, Objective 1.</b> Programs to reach from 50-200 adults, seniors, or parent-child teams with training that focuses on improving information literacy and research skills in the electronic environment.		
Awards: 11	Total Amount: \$179,634	# People Served: 9,750
<b>LibQual Survey—Goal 2, Objective 1.</b> Provides academic libraries with funds to promote and complete a LibQual survey and train relevant staff in its implementation, interpretation and utilization.		
Awards: 5	Total Amount: \$15,000	# People Served: 12,328
<b>Library Services for the Future—Goal 6, Objective 1.</b> This program invited libraries to use what they learned at the MBLC Futures Institute as a springboard for examining and marketing (including electronically) the concept of the library “experience”.		
Awards: 4	Total Amount: \$65,100	# People Served: 2,705
<b>Manuscript Arrangement and Description—Goal 1, Objective 3.</b> Provides funding for planning, organization, and description of archival materials.		
Awards: 3	Total Amount: \$51,060	# People Served: 37,317
<b>Mother Goose Asks “Why”—Goal 4, Objective 5.</b> To develop literacy projects that empower parents to share great children’s books and related science activities with their children.		
Awards: 14	Total Amount: \$131,780	# People Served: 4,652

<b>Mother Goose on the Loose—Goal 4, Objective 5.</b> Youth services staff will work with parents in a highly structured program which teaches them to use a variety of techniques to help their children learn and be ready for school.		
Awards: 5	Total Amount: \$48,130	# People Served: 500
<b>Network Connections and Network Connections and Servers—Goal 1, Objective 1.</b> To enhance services to library users by upgrading central site hardware, software and servers.		
Awards: 6	Total Amount: \$144,153	# People Served: 6,349,097
<b>Network System Upgrades—Goal 1, Objective 1.</b> To enhance services to library users by upgrading central site hardware, software and servers.		
Awards: 2	Total Amount: \$1,037,865	# People Served: 2,127,389
<b>On the Same Page—Goal 6, Objective 3.</b> To purchase books (print and audio formats), develop project promotion strategies, feature readers’ advisory support tools and provide book-related links to promote discussion of shared titles for community read-a-thons, promoting a culture of reading, increasing literacy and building community connectivity.		
Awards: 35	Total Amount: \$232,330	# People Served: 118,704
<b>Open Projects—Goals 1—6.</b> To implement specific projects that do not clearly fit into one of the current programs mentioned above. This category allows libraries some flexibility and creativity in meeting their plan objectives, and provides the Board with ideas of key interests to the library community.		
Awards: 32	Total Amount: \$775,500	# People Served: 2,511,294
<b>Preservation of Library and Archival Materials—Goal 1, Objective 3.</b> To enable libraries to preserve/conservate library and/or archival materials of significant value.		
Awards: 4	Total Amount: \$92,092	# People Served: 4,020
<b>Preservation Survey—Goal 1, Objective 3.</b> Allows libraries to determine individual item conservation requirements and needs for proper storage, care and handling.		
Awards: 27	Total Amount: \$59,500	# People Served: 274,751
<b>Reader’s Advisory in the Library—Goal 2, Objective 1.</b> Provide staff training in reader’s advisory skills and provide electronic and other reader’s advisory tools in the library.		
Awards: 8	Total Amount: \$88,000	# People Served: 400,329
<b>School Library Incentive—Goal 4, Objective 2.</b> To implement activities described in a school library or district-wide school library long range plan.		
Awards: 32	Total Amount: \$145,000	# People Served: 17,569
<b>Serving People with Disabilities—Goal 5, Objective 3.</b> To implement activities in a library’s ADA Action Plan intended to provide improved service to the library’s disabled community.		
Awards: 8	Total Amount: \$169,979	# People Served: 7,595
<b>Small Libraries in Networks--Goal 1, Objective 1.</b> To assist public libraries in municipalities of under 10,000 population to maintain membership in one of the automated networks		
Awards: 6	Total Amount: \$368,724	# People Served: 700,000

<b>Statewide Database and Promotion—Goal 3, Objective 1.</b> To design a program to reach from 50-200 adults, seniors, or parent-child teams with training that focuses on improving information literacy and research skills in the electronic environment.		
Awards: 2	Total Amount: \$17,505	# People Served: 250
<b>Virtual Catalog—Goal 1, Objective 1.</b> To increase resource sharing through the addition of new library systems to the state-wide location and requesting tool..		
Awards: 2	Total Amount: \$27,000	# People Served: 17,000

## **Overall Report of Results in Achieving Goals and Objectives Based on Long Range Plan**

Unless otherwise noted, this report is based on the first four years of the Massachusetts 5-Year Plan—federal fiscal years 2003, 2004, 2005 and 2006.

***Goal 1: Enhance Massachusetts library resources and their accessibility to residents by building the technological infrastructure needed to link all types of libraries and by promoting preservation and access.***

**Goal 1, Objective 1: Support the development of the technological infrastructure needed by Massachusetts libraries to access library automation and electronic information services and extend these resources to the community.**

**Goal 1, Objective 2: Support the planning and development of a digital library for Massachusetts to include the virtual catalog\*, patron authentication service\*\*, licensed databases, online reference services and enhanced access to periodical articles not available online.**

\*The Virtual Catalog searches through many individual Massachusetts library catalogs for a book, CD, audio or video, informs the user who owns it and whether it is on the shelf, and offers the opportunity to request the item.

\*\* A system whereby licensed services may be accessed on the Internet by patrons using a personal identification number. Services may be provided on a statewide, regional or individual library basis.

*Massachusetts made progress toward this goal.*

**This goal is discussed at length in Part III, Results of In-Depth Evaluation. This initiative produced a significant advance in library service in the state.**

***Goal 2: Maintain and extend effective library and information services for users by providing library staff with training and support.***

**Goal 2, Management Objective 1: Provide consulting services, technical assistance, and a comprehensive circulating and reference collection of professional materials to serve as a central resource for library staffs.**

*Massachusetts made progress toward this goal.*

Consulting staff provided ongoing technical assistance to constituent libraries through phone, email, regular mail and site visits. As well as advice on project programming and purchases, staff recommended professional materials available for loan to library staff members from the MBLC collection. These materials are maintained in the MBLC professional library and include topics such as: library administration, personnel issues, financial management, trusteeship, planning and evaluation, customer service and preservation.

**Management Outputs**

During 2003, 2004 and 2005, there were a total of 204 site visits to sub-grantees. The library collection includes 3,800 volumes, 120 periodical subscriptions, 50 professional videos, agency publications and archives. The library is a member of the North of Boston Library Exchange (NOBLE) library network and provides reference, inter-library loan and direct lending services to the library community. In 2003, 2004 and 2005, \$81,519 was expended on materials, and assistance was provided to members of the library community on 1,643 occasions.

**Goal 2, Objective 1: Coordinate and provide continuing education opportunities, improve customer service, and enable library staff to become better managers, proficient guides to electronic resources, and more responsive to user needs to meet public expectations.**

*Massachusetts made progress toward this goal, using the following strategies, services, and activities.*

➤ ***Customer Service***

This mini-grant program encouraged libraries to design a customer service campaign that would reaffirm good library service.

For Customer Services and Marketing the Library, multi-type libraries carried out program planning and implementation in the following areas: how to improve customer service, how to deal with problem patrons, and how to resolve issues about use of new technologies. Staff received training that would allow them to better understand the

expectations of the public from a customer service viewpoint. They developed, evaluated and updated staff training manuals; they created and/or updated library policies and procedures to reflect attitudes of good customer service. “Secret shopper” trips were made to help staff experience service from the customer’s view. Staff also developed customer service-oriented public relations strategies to attract new users to the library and encourage them to interact with newly-trained staff.

### **Project Outputs**

In the year 2000, the MBLC contracted with Market Street Research to do before-and-after studies of libraries participating in the first round of the Customer Service and Marketing the Library program. The 25 participating libraries raised their staff satisfaction score (measured by the proportion of town residents randomly called who rated staff “excellent” in: a) their knowledge and competence, b) making customers feel welcome, and c) going out of their way to help by 10.4% overall. Twenty-four libraries participated in this program in 2001 and 2002, under the previous five-year plan. In fiscal years 2003-2006, 33 additional libraries participated in this program, for a total expenditure of \$278,584. There were 1,040 staff trained, and they served a total population of 1,121,826.

### **Project Outcomes**

An excellent example of impact was from the Duxbury Public Library which developed an assessment instrument “Customer Service – Knowledge and Comfort Survey” that was used as the basis for discussion for training. At the close of the grant year staff members filled out the same survey they had filled out the previous year. All 23 staff members participated to determine if their knowledge, comfort levels or attitudes had changed in positive or negative ways. Seventeen staff indicated the responses were the same or close to the same level of knowledge and comfort; two were slightly more negative and nine responses were more positive in terms of their levels of knowledge and attitudes. Among the most revealing statements were: “ My co-workers are my customers,” and, “The library provides adequate customer service training.” Finally, after a year of training, every staff member agreed with the statement that the library is first and foremost a customer service institution. A project outcome was to involve school administrators and the Duxbury Police Department school liaisons in discussions and brainstorming with library staff. Since this project began, library staffs have held a series of meetings with the school D.A.R.E. officer and the principals of the Elementary and Duxbury Middle School. Another outcome was to designate a specific area in the building for appropriate age groups during after-school hours.

### **➤ Readers’ Advisory in the Library**

This mini-grant program provided staff training in reader’s advisory skills and provided electronic and other reader’s advisory tools in the library.

While the library community has spent the past decade or longer wrestling with issues of new technology, many traditional services, such as reader’s advisory services, have gone by the board. From conversations with librarians in the field, we learned that many library staffs do not feel confident in their abilities to match a person with the right book. In spite of the availability of new databases such as “Novelist” and “What Do I Read Next?” many staffs had not received training in their use, nor did they feel secure in their ability to help a patron use these new electronic tools. In 2005, a new program was offered to train staff in the use of electronic and print reader’s advisory tools. It enabled libraries to purchase popular reading collections in multiple formats, but the centerpiece of

the grant project was a genre study that library staffs had been involved with during the course of the project year.

Nine public libraries, the Western Regional Library System (on behalf of ten libraries) and libraries within the Department of Correction have embarked on this course of study. The regional library system and its member libraries and the Department of Correction will be involved in this study over the course of two years while the public libraries are working on one-year projects. The Manager of Library Services for the Massachusetts Department of Correction works with 13 individual prison librarians. This project has provided a focused discussion topic on readers' services as part of their bimonthly meetings. Initial reports from the library community indicate extremely positive satisfaction with this program, which affords the opportunity to study and discuss books and reading interests and should directly affect their success at working with their patrons. As a team-building effort, the project brought staffs closer together as they discussed the details and appeal characteristics of their chosen genres (mysteries, historical fiction, thrillers, etc.).

#### **Project Outputs**

In this first year of the project, 220 staff are being trained. They serve a total population of 400,329.

#### **Project Impact**

In initial project reports, staff have comments like the following: "This [interaction with a patron] makes the day go by so fast! I had pulled three or four books off the shelves in a matter of minutes, and she took them all!"

One staff in a small library reported 43 Reader's Advisory interactions in the month following the start of training.

Patrons expressed great satisfaction regarding their access to electronic reader's advisory resources acquired through the program. One young mom with two little ones nearby said, "This is so great! Now I can explore 'What Do I Read Next?' while they're napping and check with you if the books are available." The library took the opportunity to discuss their interlibrary loan service.

One customer had expressed her frustration about not being able to keep up with her favorite authors. "I can't believe it. I can ask to be notified when my favorite author published another book? This is so great!"

#### ➤ ***LibQUAL+™ Survey***

This mini-grant was developed by the Association of Research Libraries to allow academic libraries the opportunity to solicit, track, understand and act upon users' opinions of service quality in order to assess and improve library services, change organizational culture, and reach out to those not aware of library services.

#### **Project Outputs**

Since its inception as a grant program in 2006, seven academic libraries have received LSTA funds to implement this survey.

Additionally, ARL and MBLC consulting staff provided a group training session for grantees on how to implement the survey prior to its release, as well as a follow up session on analyzing and interpreting results.

#### **Project Impact**

While research indicates that web-based surveys have low response rates of 15-20%, all but one grantee reported response rates of 25% with most over 30%. Creative

promotion of the survey by grantees, such as the transformation of one institution's popular reference librarian into the "LibQUAL guy" fostered participation by students and faculty alike. Since its initial introduction, this survey tool has provided these libraries an important way to incorporate data into revising their long range plans in order to better serve their respective academic communities.

➤ ***Open Project Peer Training in Reference Databases – Western Massachusetts Regional Library System (WMRLS)***

Western Massachusetts has many small libraries that have fewer staff and are open fewer hours than larger libraries in the Commonwealth. Through a WMRLS pilot project it was learned that there was a need to train the staff in small libraries to use and promote statewide electronic resources using a train-the-trainer approach. Having the training come to their doorstep made it possible for staff to learn valuable skills in a friendly and familiar environment. Receiving training from peers was also less intimidating. This successful project was the result of rigorous planning and very dedicated regional staff and member library librarians. It provided better training materials, a system for mentoring after training, and a way to encourage the use of new skills for longer than a year after training.

By the time peer trainers went out in the field, they had attended programs on learning and presentation styles, as well as about the documentation on which they would be basing their training sessions. A trainer consultant was hired to develop training materials and teach the peer trainers how to use them. Seven peer trainers provided hands-on training at smaller regional member libraries that are understaffed, under-funded and isolated, improving the search skills and confidence levels of staff at each location. The peer trainers were also available by telephone and e-mail for follow-up questions. Nearby school librarians and corporate librarians were invited to attend the training as well.

**Project Outputs**

Seven peer trainers conducted 20 peer training sessions in member public and school libraries, and 100 library staff persons were trained from 56 libraries. A total of 17% of the region's member libraries received training in small, hands-on sessions. Peer trainers received one full day of training with a consultant on learning styles and presentation materials. A half-day session was held for peer trainers by grantees' staff to review training materials. At the end of the grant, a final training session was held at the regional headquarters to introduce 10 more librarians to peer training techniques. Ten trainer packets and 100 participant packets were prepared.

**Project Outcomes**

Database pre- and post-testing was sent to trainees, with a response rate of 74% and 51%, respectively. Database statistics for libraries that sent staff to training were compared pre- and post-training. Eighty-five percent of trainees indicated that they learned from the training, with 62% of these libraries showing measurable increases in the usage of the statewide licensed databases. Fifty percent of these libraries' usage doubled after the training. Testing for libraries that showed little or no increase in use revealed a more competent use of the databases. Mentoring relationships, valuable for trainer and trainee, developed in a couple of instances. Comments from both trainees and trainers illustrate the value of the project:

Trainees regarding training taken:

- *"Now I can better market the library as a place to find information."*

- *"Now I have an answer for teachers who insist that students not use the computer for homework."*

Trainer:

- *"I went into this project hoping to share information with others, never dreaming how much I myself would learn from the entire experience. We all won."*

**Goal 2, Objective 2: Deliver continuing education to professionals, support staff and stakeholders in a broad range of content areas using both traditional and technologically-facilitated methods, demonstrating emerging technologies when appropriate.**

*Massachusetts made progress toward this goal, using the following strategies, services, and activities.*

➤ **Futures Institute and "Library Services for the Future"**

In June 2002 (during the prior LSTA Long Range Plan) the library convened a Futures Institute that was held at Worcester Polytechnic Institute, one of the state's premier technological institutions. This Institute, which took place over a two-day period, involved national and international speakers as well as considerable local expertise in areas of emerging trends and technologies.

The Institute provided a unique experience for 150 public, school, academic and special librarians in the Commonwealth to examine the technological, governmental, societal and educational trends in the world at large, and to discuss their implications for the future of library service. Internet 2, the Experience Economy, electronic publishing, and social capital and civic institutions were just a few topics. Among the discussions that ensued from the Futures Institute was the idea of the library of the 21st century as a gateway to the community.

The Institute was followed by a grant offering in FY 2004, "Library Service for the Future," and three projects were carried out by Regional Library staff that had significant impact on their member libraries.

**Project Impact**

The three projects involved new technologies, e.g., the use of handheld devices in libraries and blogging, and a substantial exploration of the library as "Commons"—a destination place at the intersection of community life.

➤ **Massachusetts Library Leadership Institute**

In June 2005, the MBLC funded a two-day Leadership Institute that was planned and carried out by the staffs of the six regional library systems. The goal was to strengthen and mobilize self-identified developing leaders who would contribute to the future of the Massachusetts library community.

**Project Outputs**

The Institute was aimed at fifty selected "leaders" from public, school and special libraries and involved support staff from each of the regions.

**Project Outcomes**

The Institute's desired outcome was to secure a commitment to leadership and a contribution to a publication, newsletter or to committee work on the state or national library associations.

Evaluation of the Leadership Institute included extensive questions about what goal/action/topic each attendee would be undertaking as a result of participation in the Institute. Seventeen attendees shared these goals; other responses related to what steps individuals would take to use/implement information from the Institute and made suggestions for further training. The fourteen mentors (two per small group) were also queried and shared their opinions about the content of the Institute, their preparation to be mentors, and suggestions for follow-up activities

In addition to energizing a diverse group of librarians across the Commonwealth, the committee of regional staff working with the MBLC liaison pushed participants to continue to be active in future planning. For this reason, two months after the Institute ended, participants were invited to a meeting that was held at one regional headquarters that invited further participation. To date, five statewide meetings have invited participation in future planning, and a blog called "Our Future" has been established. The group took as its vision: "Leaping forward with turbo-charged customer service, Massachusetts libraries are everyone's portal to a commonwealth of information, creative programs, leading-edge technology, and materials to satisfy every curiosity. Our libraries spark innovative partnerships that promote an exchange of diverse ideas and ignite community spirit."

Participants had an opportunity to hear "extreme" customer service expert Ari Weinzwieg, and plans are underway to invite participants to listen to more outstanding speakers. The regional library staffs have shown an amazing commitment to this project; they have come together almost as one unit to support all library staffs to fulfill the mission that was crafted at the Leadership Institute.

***Goal 3: Emphasize the vital role libraries play in lifelong learning by focusing on the importance of information literacy skills.***

**Goal 3, Objective 1: Develop programs and services using traditional instruction and web-based tutorials to improve the information literacy skills users need to identify, locate, evaluate, and use information effectively in the digital age.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

➤ ***Information Literacy***

This targeted grant program helped libraries provide programs and opportunities to help their patrons feel comfortable in using new electronic resources and making informed decisions about selecting appropriate resources.

**Outputs**

A total of 11 institutions received Information Literacy grants during this five-year plan period.

Many libraries are not currently prepared to meet this challenge. Under the Information Literacy grant program, libraries were given grants to design projects specifically for their communities, defined as general public, seniors, parents, children, learners of English as a second language, or any combination of these groups. They were required to reach a minimum of 100-125 library users each grant year through regularly scheduled multi-session training programs that focused on improving information literacy and research skills in the electronic environment. Instruction could include how to use an online catalog, statewide and other electronic databases, and the Internet. Grant funds could be used for personnel, library materials, supplies, promotion, and equipment, with a 50-50 match required for libraries that elected to use grant funds for computers and related equipment.

When this grant was first offered, this grant was especially popular with both academic and public libraries equipping computer training labs, with 23 libraries receiving grants in FY01 and FY02. As the libraries built their labs and were later required to comply with the Computer Internet Protection Act in order to apply grant funds toward the purchase of computers and related equipment, this grant became less popular.

Public libraries and schools often teamed up to bring information literacy training programs to teachers' in-service days, as was the case at the Peabody Institute Library in Danvers, and the Beaman Memorial Public Library in West Boylston. They each created extensive training materials for students and teachers and promoted their projects widely through school and community newsletters, newspapers and meetings. Their special sessions made teachers aware of the breadth of resources available to their students, as well as provided guidance on using resources that they may not have been comfortable recommending or teaching others to use on their own. A Danvers teacher wrote on her in-service evaluation: "I didn't think I had enough time in my classes to do research, but with the help of public reference librarians and the information literacy workshop, I believe we will be able to pull it off, to the learning advantage of the students." Peabody also held "Information Literacy Immersion" days, bringing students and their teachers from the schools to the public library for the day. Since receiving the grant, the teachers in the Danvers Public Schools advocated for the adoption of a district-wide K12 research model to replace the current uncoordinated approach.

- *The Walpole Public Schools provided instruction to student/parent pairs, to bring the world of electronic resources to both parents and their school-age children. They offered sessions during the day as well as in the evening to encourage participation, and librarians from the Walpole Public Library came to the schools to teach sessions on the use of the OPAC. Lesley University used funds to develop web-based tutorials to teach their students and faculty how to use essential online research tools 24/7 from any computer with Internet access. They widely promoted its usage to its on- and off-campus students. One faculty member's comment about the tutorial is representative of its popularity at Lesley: "I finally have a critical student guide/review tool to bring to my students. I feel it is a must that all new hires and all incoming students be required to go through the experience of the six modules."*
- *At Mount Ida College, a small liberal arts college in Newton, Massachusetts, 937 students out of 1300 were taught information literacy skills through the integration of information literacy skills in the liberal arts courses taken both in person and via*

*WebCT. Students developed transferable skills to utilize electronic resources and a foundation to continue to develop their information literacy skills. Northern Essex Community College reached out especially to their ESL students with grant-funded training and a redesigned library web page.*

### **Project Outcomes**

In FY04, grantees were required to apply outcomes-based evaluation techniques to their projects. All grantees attended a full day of OBE training taught by the LSTA Project Consultant. FY03 grantees completing their second year of two-year grants were also invited to attend. Five of the six grantees opted to attend.

FY04 grantee, Frontier Regional School District focused on three outcomes as follows for their school-wide Information Literacy grant. Intermediate: Students will be able to analyze the messages of the media beyond formal classroom instruction. Result: Media literacy was implemented in the curricula in 5 courses and 279 students attended programs designed to teach them media literacy skills. Intermediate: Students are able to select information from three varied database resources most relevant to their needs. Result: A self-directed exercise revealed that out of 98 students, 53% received an A, 29% B, 9% C, 6% D, 3% F. Long-term: Students meet educational goals using electronic resources and use electronic database for research in English, Social Studies and Media Literacy Projects. Result: Each student completing English class in the school was required to write a research paper, and other courses were encouraged to include this requirement as well.

FY04 grantee Milford Town Library defined two outcomes for their Information Literacy project that targeted their adult population. Intermediate: 80% of participants are able to successfully locate library materials in the online catalog with 75% accuracy. Long-term: 80% of participants can identify reliable, objective, accurate and current information resources for professional and personal needs with 75% accuracy. Final grant reporting revealed that Milford exceeded their intermediate goal, with 85% of participants testing out at 75% accuracy, while they fell just short of their long-term goal, with only 79% of participants meeting the 75% accuracy mark.

### **➤ Statewide Database Promotion and Training**

Under this mini-grant program, libraries designed projects promoting the use of and instruction in some or all of the statewide licensed databases.

### **Project Outputs**

This project was first offered FY2006, when a total of 5 institutions received grants.

Many libraries have not had the resources or time to reach out to their patrons and widely promote or teach the use of valuable and costly statewide licensed electronic resources in a consistent manner. Libraries are invited and encouraged to develop programs that emphasize promotion, targeting the unique personal and professional interests of their patrons. Depending on the applicant's community of users, the target audiences are the general public or specific groups by age or interest (seniors, children, scouts, book clubs, investing clubs, etc.). The desired outcomes of this grant program are to raise awareness of the LSTA-funded statewide databases freely available to residents of the Commonwealth and to increase residents' skill and comfort level when using the Internet, beyond search engines like Google, Yahoo and America Online.

The Reuben Hoar Memorial Library, Littleton, targeted homeschoolers, book groups, business people and “older citizens” for 16 presentations under this grant category. Venues for presentations included the library, as well as local business groups’ regularly scheduled meeting places. Sessions included a segment comparing InfoTrac to Yahoo and Google that was very well-received. Evaluations confirmed the lack of awareness of these important resources prior to the sessions. Only one percent of those attending failed to respond that they would use the databases after the session. Since the sessions were held, database use increased eight-fold prior to same time period in the previous year. Grant funds made it possible for the library to purchase a color printer for creating inviting promotional and training materials, as well as a portable computer projector, enabling staff to present sessions in-house or “on the road.”

The Reading Public Library’s “Online at the Library” project offered 15 sessions with six speakers for various constituent groups. Their traveling promotional clothesline display of library cards, flyers and other items appropriate for each target group will be placed in schools, Town Hall, the senior center and other popular spots. Teen sessions were held on early release days for students, who have been provided with time by their schools to go the public library to conduct research for National History Day, science, and country reports. Older adult sessions focused on investing, consumer information, travel and health, with a couple of programs held at the Senior Center as part of the Center’s Lunch and Learn Program. Sessions for teachers and media specialists were held at the schools, while training for parents of young children were treated to sessions on health, investing, travel and fun learning tools for kids.

***Goal 4: Strengthen the role libraries play in children’s and young adults’ learning and their success in life.***

**Goal 4, Management Objective: Assist libraries in planning, implementing, and evaluating library services to children and youth.**

**Goal 4, Objective 1: Encourage and support the development of children’s and young adults’ reading skills and an appreciation of literature through a variety of innovative programs, including after-school reading programs in school and public libraries.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

➤ **School Library Incentive**

This program implemented activities described in a school library’s or school district’s long range plan.

A total of 36 institutions received grants during this five-year plan period.

In the Commonwealth, poor facilities, lack of automation or up-to-date equipment, and outdated collections incompatible with the Curriculum Frameworks hinder our school library media centers. This program improves the resources available to K-12 students through their school library media centers and promotes the visibility of school library media centers and their role as “an integral part of the teaching and learning

process across all areas of the curriculum” (Massachusetts School Library Media Association’s “Model School Rubrics,” May 2002).

The School Library Incentive grant program is a flexible one, in that it allows the grantee to propose a project that enables the institution to carry out one or more goals from their long range plan. The majority of school library media centers receiving funding through this grant apply a substantial portion of it to collection development enabling the institution to meet the changes under Massachusetts Curriculum Frameworks. These newer collections also entice students to come to the media center for current resources such as graphic novels, accelerated reading materials, CDs, and DVDs. The grantees also work with faculty to order materials relevant to their changing curriculum needs, as well as help them integrate the materials into their assignments. Grant funds also are spent on stimulating speakers and trips to local cultural and historical sites to bring course content alive and interest students who may not otherwise become engaged.

- *Gardner High School applied grant funds to address the considerable and unique needs of their numerous students receiving special education services, marking the first time in the history of the school library that they offered organized programs for this target group. The faculty and school library media specialist cooperated to integrate materials and programs into the coursework for these special needs students. Highlights included bringing New England Aquarium’s Traveling Tide pool program to the school, prefaced by students researching and making presentations on a tide pool animal of their choice, as well as a trip to Northeastern University’s Marine Science Center, a hands-on facility where several students looked into a microscope for the first time and enjoyed special touch tanks.*
- *Students from an urban setting benefited from the LSTA grant to Cambridge Public Schools, marking the first time in the city of Cambridge that all branches of the local public library worked on an extended project concurrently with multiple schools. Site-based teams of teachers and school and public librarians designed curriculum units where students were assigned reading and writing activities culminating with projects connected to the author/illustrator visits. The school librarians received professional development in the selection and use of nonfiction as well as how to prepare for an author visit. Students and their parents attended presentations and luncheons with multi-racial male and female authors and illustrators, learning how important all people were to the history of this country and to ongoing, everyday affairs.*
- *Amesbury Middle School’s “Festival of Book Talks” resulted in renewed excitement in reading by the middle school students, their teachers and parents. The library gained new and interesting books to garner the students’ interest. Guest book talkers included parents, school and public librarians, school administrators, an author, and the students themselves, who developed public speaking skills by presenting book talks. The value of these presenters is summed by student comments: “I liked the fact that they were only a grade higher than me and they liked the books so I might like those same books,” and, “I like having new people sharing their opinions about the books.” Each book talker sat in a specially decorated “book talker’s chair” and received a certificate of appreciation. Their book talks were posted on the school library’s website that was dedicated at a school assembly. Invitations from local library associations and regional groups around the*

*state have kept the project librarian busy showcasing how to integrate this effective teaching tool with her stellar PowerPoint presentation, "What is a Book Talk?"*

➤ **Before School/After School Reading**

This targeted grant provided opportunities for children and young adults to practice and develop their reading skills, learn to love reading and open doors for which reading skills are the key.

**Project Outputs**

A total of 10 institutions received grants during this five-year plan period (offered in FY04 and FY05).

School library media centers play an important role in the success of local reading improvement efforts by increasing collaboration between instructional and school library media center staff, providing additional instructional materials and resources, and extending hours of operation during non-school hours. An exemplary school library media program "promotes a school wide culture of reading and learning, in which all students read the target indicator, promotes reading for literacy and personal enjoyment." The After School/Before School Reading Program helps libraries in their efforts to become exemplary players in teaching and learning, making it possible for school and public libraries to offer free programs throughout the school year (before, during or after school) for K-12 students. The emphasis in this program is on reading for pleasure and recreation, not on drills or phonics exercises. While a variety of creative activities based on this literature may take place during the meetings, a defined period of time will be devoted to reading aloud, independent reading of enjoyable and informational texts, writing, discussion, and exploration of literature.

- *LSTA grantee Venerini Academy in the city of Worcester formed four different books clubs that met during and after school. A total of 400 students participated either through the clubs themselves or special programs that highlighted the clubs. The school library added 383 books, videos and multimedia sets to its collection as a result of the grant. Meetings focused on seasonal, multicultural and award-winning children's authors. A special treat was a visit from Farmer Minor and his Pot Bellied Pig Daisy. Farmer Minor, a "Mr. Rogers" type character who promotes reading and school libraries, has taken Daisy to meet students all over the country, as well as a visit with Laura Bush. The students were so inspired after meeting Daisy that they decided to raise money for a pig as through the Heifer Project. As students commented: "It was the best thing anyone ever thought of," "I thought it was a lot of fun to be with friends and read," and, "I loved when the pig came in and when we had sushi, scrapbooks, storytellers and Mexican food." (Note: Food donated by local sources.)*
- *Students from the rural community at Erving Elementary School participated in an "After School Animals" program designed to increase first and fourth graders' enthusiasm for reading by linking reading and children's natural love for animals. Students were introduced to some of the most celebrated animal stories of the 20th century and met face-to-face with live animals about which the books were written. The program began with the Black Stallion Literacy Project and went on to an exploration of animals of the region as well as familiar domesticated animals and related literature. Readings were interspersed with outdoor experiences on natural*

*habitats led by a local naturalist as well as a trip to the public library. Over 300 books and audiovisual materials were purchased and in circulation increased in many subject areas with improvement in the 500 and 600's in particular as high as 30% from the previous year.*

➤ **Serving ‘Tweens and Teens**

This targeted grant began in FY2007 to help meet the needs of young adults in Massachusetts public libraries. Participating libraries formed Teen Advisory Boards as part of their programs.

In 2005, after discussions with representatives serving youth ages 12-18, it became clear that the MBLC should respond to the needs of libraries who seek to provide programs and services for this age group. While library services to young adults had previously been somewhat in decline, there has been resurgence in recent years and a trend toward community based programs focused on youth development. This idea builds on the assets of “at-risk,” underserved youth with programs that intervene before these adolescents begin to get into trouble. The response was the development of the “Serving ‘Tweens and Teens” mini-grant program. This program was widely promoted prior to the availability of grant funds and library development received an initial inquiry at the Letter of Intent stage of more than 32 libraries. In March 2006, 17 proposals were submitted and reviewed and in July 2006, 11 were chosen for funding. These programs require libraries to a) form or strengthen a Teen Advisory Board b) develop creative programming strategies that reach out and meet the needs of ‘tweens and teens c) develop collections of materials including books, books on CD, magazines, games, and graphic novels and to the extent that it is possible, to align these materials with the state’s recently adopted “Standards for Public Library Service to Young Adults” and curriculum frameworks D) libraries are also encouraged to reexamine “teen space” within the library, and limited funds may be used for non-structural redesign. These two-year projects first receive funding in October 2006. Therefore, assessment is outside the scope of our five-year evaluation. Nevertheless, this program exemplifies the value of using input from our statewide advisory group to reflect the needs of the library community.

➤ **Open Project – After School Storytelling Club, Metrowest MA Regional Library System**

This two-year after-school program, which began in October 2005, funds a “training-the-trainer” program for up to 20 Metrowest MA Regional Library System member libraries to have a youth services librarian trained in storytelling and teaching storytelling on site. The trained librarians will train up to 32 middle school students in storytelling through two sessions of “Storytelling Club,” a 6-week after-school program at their facilities. Each 6-week program would include seeing a professional storyteller perform, learning how to create, select and tell stories, and planning a storytelling program for K-grade 4 aged children. Students from the spring session could return as mentors in the autumn session. The grant will fund materials such as books and audiobooks, technology such as blogging, and in some cases, staff. The project trains library staff, meets developmental assets of teens, provides a service learning opportunity, and fills the role of the library being a community place and cultural center.

Thirteen people participated in a one and one half day workshop on storytelling training with Sherry Norfolk. In the 12-hour workshop, participants went from telling a

basic story to a colleague to performing a story with sound, movement and drama to the entire group. Pre- and post- surveys queried participants on comfort level with public speaking, comfort level with storytelling, knowledge of storytelling resources, skill level at storytelling, and likelihood of participation in the grant. Only one respondent did not increase in at least one area. More than 50% of the participants demonstrated growth in storytelling knowledge and skill. Seven of the 11 participants who completed both surveys increased in public speaking; six increased in comfort level with storytelling, seven increased in knowledge of storytelling resources, six increased in skill level, and one increased in likelihood to participate in the grant. (Note: Six initially rated participation likelihood as high.) A blog was created and set up at <http://metrowest.typepad.com>. The blog was designed to be both a resource for librarians running programs and a place for students to report on their progress and experiences. A separate resource webpage for librarians was created at <http://www.mmrls.org/storytelling.htm>, with sample performer contracts, evaluations, press releases and PR and a growing list of answers to frequently asked questions.

**Goal 4, Objective 2: Promote the development of skills, competencies, and knowledge that contribute to professional levels of children’s librarianship.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

➤ **YSLead Massachusetts Institute – Massachusetts Regional Library Systems**

The six Massachusetts regional library systems received funding to develop leadership capacity among school and public librarians serving youth. In the summers of 2002 and 2003, 95 youth services librarians interested in expanding their leadership roles gathered at Endicott College in Beverly, Massachusetts, for YSLead Massachusetts, a youth services leadership institute for librarians. This project afforded opportunities for personal and professional growth.

**Project Outputs**

Over a two-year period YSLead Massachusetts coordinators identified 95 potential leaders in school and public libraries from across the state and brought them together, along with 32 mentors, for two and a half days of collaborative training in leadership and mentoring. Mentors assumed a leadership role at the institute, assisted with group discussion, and made themselves available as a resource to participants during free time. The institute covered understanding leadership styles, the role of the leader, communication, coaching, and mentoring. After the institutes, participants worked as mentors, and participated in continuing education workshops focusing on leadership. All participants committed to taking an active role in selected regional, state or national library associations.

Participants gained skills and new confidence enabling them to make a difference in their libraries and professions. Participants’ libraries benefited by gaining an advocate for youth services and youth, an employee ready to mentor and coach staff, improved recruitment and retention opportunities, and a role model for other youth services staff. For two years following the YS Lead institute, each of the six regional systems conducted a series of workshops called IDYLS (Introduction to Dynamic Youth Library Services).

Each IDYLS workshop reached an additional 20-30 school and public librarians in each region thus extending the training received at the YS Lead institute far beyond its original number. In all, some 200 youth services librarians received the benefit of the energy and enthusiasm of the original institute participants.

➤ ***Discovery Kits***

In response to the tremendous demands of the new statewide Curriculum Frameworks, public and school libraries developed at least 10 kits of substantial size containing materials in all formats, on major topics that were studied in the classroom or in special programs. This program, though targeting school and public libraries and their interaction with students, was also used in outreach efforts to other populations. Kits included books (on varying reading levels), videos, audiocassettes, models or realia, computer software, educational games/puzzles, pamphlets, significant articles, bibliographies, a list of other kinds of resources (for example, museum exhibits and passes, historical sites, science or nature centers, programs, etc.), and suggested activities for classes, family groups, or individuals – all revolving around the kit’s theme.

**Project Outputs**

There have been 24 Discovery Kits mini-grant projects under this long range plan, serving 15,378 children. Evaluation sheets were included in the kits, and teachers and parents rated individual kit’s materials as highly relevant and useful. The selection of themes and the ideas and concepts for the kits’ contents was developed in cooperation with teachers and the counterpart librarian (i.e., school or public library) in order to foster school/public library cooperation and resource sharing. Each project held two open houses, one at the public and one at the school library, to promote kits.

**Goal 4, Objective 3: Encourage and support the establishment and expansion of early childhood programs and services that stimulate a love of reading, provide an introduction to quality children’s literature, promote early language development, and emphasize the importance of parental involvement in all these processes.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

➤ ***Mother Goose on the Loose***

The Mother Goose on the Loose program was first offered in 2005 as an early childhood literacy program for babies, young children and their caregivers. This innovative emergent literacy program builds on the most recent findings on brain research that shows children learn best through repetition in a nurturing atmosphere. Pioneered at the Enoch Pratt Free Library in Baltimore, this structured program was developed by Betsy Diamant-Cohen, who integrated her experiences as a children’s librarian with the work of educator Barbara Cass-Beggs. It teaches storytime leaders to work with parents of young children (ages 6 months - 3 years) for reading readiness with a variety of activities, including rhymes, songs, finger plays, puppets, and musical instruments.

**Project Outputs**

In the first year, youth services staff from five libraries received training in this program that reached an average of fifty families in each community. Libraries used grant funds to buy appropriate developmental toys, musical instruments, and books and CDs that were introduced to the parents. Libraries were encouraged to provide additional programming on topics such as “recent developments in the field of baby brain research,” “the importance of music for children,” and “age appropriate crafts to do with a young child.” Early evaluations reflected the success of the program. Attitudes of parents and caregivers alike are represented in the positive response of one participant, “The instruments were great; [we] loved the singing. Interactions with other children was wonderful, the rhymes are wonderful, and we loved the books!” One children’s librarian noted, “As the presenter of the Mother Goose on the Loose program, I feel this is one of the most successful programs we have offered for ages 0-3. The parents thank me all the time. The children will come up and say, ‘Pig pig,’ because they are expecting to see the pig puppet at the program.” One mother said that her daughter asks for a certain finger play all the time, and they come to the library to check out the books that I read.” In addition, several libraries have adapted the program to work with Teen Parents and follow up these sessions with an Early Intervention program on parenting issues. Many of these teens are using the library again and taking out books for their little ones. All five libraries have promised to participate in an evaluation process that surveys parents about how to strengthen the program. This evaluation will be folded into the training that is provided for the coming year’s eight grant recipients in 2006-2007.

➤ ***Early Childhood***

In the Early Childhood mini-grant, libraries planned and implemented a project for infant-toddler-preschool children and their parents and caregivers. Each project was planned with the help of an advisory group and involved cooperation with one or more appropriate agencies or organizations in the community. Components of the project included: series of programs for the children and the parents/caregivers; family programs for parents and young children together; multi-format collection development aimed at young children and the adults who care for them; packets of information about the importance of reading with young children; development of public relations materials; and outreach activities to the target groups at locations other than the library, as well as in-library events.

**Project Outputs**

In the four years since the plan began, there have been nine Early Childhood literacy projects, serving a total of 3,746 children between the ages of birth and five years. (There were 17 projects for this program under the previous plan.)

**Project Outcomes**

The Sutton Free Public Library demonstrated outcomes for their project. When parents and caregivers were surveyed in fall 2004 they reported that 56% had repeated elements of the story time program at home; 67% reported checking out library materials when attending the program; and 100% said they would sign their child up for the program again. By summer 2005, 88% said they repeated elements at home and 88% checked out materials. When asked what they felt their children had learned from the program, parents made the following comments: social skills, sharing, following directions, listening, an appreciation for books, reading and group participation. One parent remarked, “It reinforces that reading is fun and helps us learn new things.”

The Sutton Free Public Library formed valuable partnerships and greatly improved a neglected children's collection. The library had never before had a children's librarian. Services provided by the Storytime Coordinator through the LSTA grant proved so valuable to the town that the position was established with local funds before the year ended.

**Goal 4, Objective 4: Encourage libraries to advance children's and young adults' information literacy by developing programs and services that teach effective information research skills, utilizing both print and electronic resources.**

See Information Literacy grant and Statewide Database Promotion and Training grant under Goal 3.

**Goal 4, Objective 5: Promote the development of family literacy programs that provide for both the emerging literacy skills of children and the parenting skills of low-literate adults.**

*Massachusetts made progress toward this goal, using the following strategies, services, and activities.*

➤ **Mother Goose Asks Why?**

"Mother Goose Asks Why?" is a literacy program that empowers parents and other caregivers of preschool and primary school aged children to share great children's books and related science activities. Developed by the Vermont Center for the Book, the program was originally funded for nationwide distribution by the National Science Foundation. "Mother Goose Asks Why?" began as pilot program in 2002 between the Central Massachusetts Regional Library System and the Massachusetts Center for the Book. The MBLC subsequently developed this pilot into a mini-grant program and offered it to libraries statewide. Massachusetts adapted the program by training librarians in how to lead the sessions. The program used thought provoking picture books, activities and discussions to engage process skills of science such as making comparisons, gathering information, and using the senses. It was organized around a set of nine picture books and a series of hands-on science activities. Books and science materials used in group sessions and/or at home with their children were loaned to participating families in a tote bag. The conversations and investigations that resulted increased positive interactions between parent and child, while incorporating the process skills of science and enhancing language development.

In addition to receiving funds to put together the Mother Goose kits, the libraries were able to increase their preschool and primary school science collections. Supplemental science activities and performers were scheduled during the months when the programs were offered. Programs such as "Top Secret Science" encouraged children to participate in a variety of science experiments in areas such as crystals, light and color, motion and flight. Other presenters portrayed the popular television character Miss Frizzle from *The Magic School Bus* series. Some presenters were brought in to tell stories about birds and

flight. Collaboration with local zoos, science centers and traveling animal programs were featured. The “Mother Goose Asks Why?” program has also been extremely popular with parents of the many children in the Commonwealth who are homeschooled and in search of programs to enrich their curricula. As one librarian noted, “This was an amazing program to develop and participate in. By receiving this grant our librarians were able to infuse enthusiasm and new ideas into our preschool programming. We found ourselves as excited as the children as we learned about observation and investigation skills through the eyes of the children. Many families commented that they would continue to look at things using the skills they learned through “Mother Goose Asks Why?” Many had a renewed interest in science but most thanked the library for giving them the opportunity to do something as a family in their overscheduled lives. They left with a better appreciation for reading to young children and an awareness of how to take picture books to the next level for their children.”

### **Project Outputs**

Over a three year period from 2002-2005, fourteen libraries were funded, reaching an average of 20-30 families in a community each year. In addition, supplementary family science programs in each community reached hundreds more. Perhaps most telling is the fact that almost all grant libraries continue to offer a “Mother Goose Asks Why?” program subsequent to their LSTA funding. The quality of this highly structured program and the use of materials already acquired with grant funds have enabled these staffs to continue to offer this as a regular part of their ongoing children’s programming.

#### **➤ Open Project – Family Literacy, Springfield Library**

The Springfield Library promoted family literacy skills by celebrating Springfield’s own Dr. Seuss. A part-time outreach librarian visited schools, parks, childcare centers, housing projects, transitional assistance centers, literacy classrooms, and other evening and weekend outreach events where families would gather. The librarian introduced families to quality literature, registered people for library cards, and promoted using library materials. Participating families received packets including books, an educational coloring book, information on the library and other community agencies, and coupons designed to encourage visits to the library, its Seuss Discovery Corner in the children’s room, and the adjacent Dr. Seuss National Memorial. The library received more than 772 board and paperback books for inclusion in “family literacy bags” that were made available for parents to check out from the library. Three family programs were offered using Dr. Seuss as a theme. A contractual worker was hired to coordinate mailings to childcare agencies and providers informing them about upcoming library programs and services. Family literacy materials were also bought, and the city used local funds to purchase a mobile unit, a “Seuss Mobile,” to reach different parts of the community.

#### **➤ Open Project – STARR (Springfield Tots are Reading Ready), Springfield Library**

The Springfield City Library further expanded services and promoted early literacy through a project that involved professional librarians training a corps of volunteers to present story times at library branches and at outreach sites such as child care centers, housing projects, transitional assistance centers, and literacy classrooms. The volunteers learned about quality children’s literature as well as the art and mechanics of presenting story time and the importance of early literacy. Training was also open to western Massachusetts librarians as well as volunteers. The consulting librarians developed a

resource manual and evaluation tools. Branch library collections were supplemented with story time resource collections. A comprehensive marketing campaign was developed to promote the project's children's services. Volunteers trained in the first project year have been serving the Springfield North WIC Nutrition Program, about which WIC has been very enthusiastic.

➤ **Open Project – Family Literacy, Robbins Library, Arlington**

The Robbins Library in Arlington began a family literacy initiative by offering family literacy workshops for parents and children. It increased its collection of reading readiness materials and reached out to parents in the community to promote the value of reading and early learning. The children's librarian designed this project based upon requests from many parents about issues related to reading. Notices were sent to the local newspaper, cable news and 30 schools in the community, and also posted on the library website. The library identified a family literacy methodology and hired a part time instructor to work with library staff to offer a series of family literacy workshops for parents and children. They purchased a new collection of reading readiness materials. A series of six-week workshops were offered at the library for 24 children aged Pre-K through third grade and their parents. The library provided workbooks and materials for the participants and expanded its collection of early reading materials including early readers, CD-ROMs, audiotapes, and videos. Participants learned strategies to assist their children in learning to read; they had an opportunity to experience creative and interactive activities promoting reading. A series of six-week workshops were offered at the library for 20 families with children, Pre-K through third grade. The library purchased 130 books, seven kits, four cassettes and four CD-ROMS. These workbooks and materials were used by participants, and the library expanded its collection of early reading materials. Participants learned strategies to assist their children in learning to read, and children had an opportunity to experience creative and interactive activities promoting reading.

***Goal 5: Provide a full range of services to persons who face special challenges using libraries.***

Many residents of Massachusetts cannot utilize libraries fully for a variety of reasons: functional illiteracy; limited ability to read and use English; disabling conditions including visual, hearing, and mobility impairments; residence within an institution where libraries may be poorly supported or non-existent; or socioeconomic factors such as poverty and transitional living arrangements. Current library collections may be inadequate, and staff may lack the appropriate training to meet the special needs of diverse groups of users. This goal affirms the role the library plays as an information access point for all, including those members of the community who are traditionally underrepresented.

**Goal 5, Management Objective: Assist libraries in planning, implementing and evaluating library services for populations with special challenges and encourage libraries to identify and respond to the diverse needs of their communities.**

***Massachusetts made progress toward this goal, engaging in the following activities and collaborations.***

The program consultant charged with library development for services to special populations actively works with other state agencies such as the Massachusetts Department of Education, Executive Office of Education, Department of Health and Human Services, Department of Correction, Department of Mental Health/Retardation, Massachusetts Commission for the Blind, Massachusetts Commission for the Deaf and Hard of Hearing, Massachusetts Commission on Disability, Office for Refugees and Transitional Assistance, and the Department of Elder Affairs. Consulting staff are also in close communication with staff from the regional and sub-regional Talking Book library programs to review data, policies, and procedures in order to meet program goals. The MBLC program consultant participates as a board member of Massachusetts Family Literacy Consortium and the Adult Basic Education Distance Learning Project.

**Goal 5, Objective 1: Improve library services to people with disabilities through use of a specially designed planning process and encourage libraries to be responsive to user needs through special materials, training, and adaptive technology.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

➤ ***Planning for Library Services for People with Disabilities/Serving People with Disabilities***

The MBLC encouraged libraries (public, school, special and academic) to respond to this objective by requiring that each library conduct a discrete planning process based on the LSTA developed document *Planning for Library Services for People with Disabilities*. These projects required that libraries develop library services to people with disabilities that were on an equal basis to all members of the community. They were encouraged to develop public relations strategies to attract people with disabilities to the library and outline how they would work in partnership with community agencies serving people of this population. Part of this project included an important staff training component.

**Project Outputs**

Based on user input, many libraries purchased adaptive equipment to serve patrons with a variety of special needs. Under the current long range plan, ten projects have been awarded to multi-type libraries—academic, public, prison and hospital libraries—and to the regional library service for the blind. The planning process that was developed in Massachusetts has been shared with libraries across the United States and has been adapted by the California State Library as one of its major initiatives. Nine projects have been carried out during this long range plan for a total expenditure of \$169,978, serving 30,137 persons with disabilities; 18 projects were carried out under the last plan.

**Goal 5, Objective 2: Strengthen the role of libraries in developing literacy and lifelong learning skills for adult new readers and those with limited English proficiency.**

*Massachusetts made progress toward this goal, using the following strategies, services, and activities.*

Note: Although family literacy falls under a different long range planning objective than above, the MBLC has actively supported a number of open grants for family literacy that impact the adult learner who is the parent. Other LSTA mini-grant programs such as “Mother Goose Asks Why?” encourage libraries to target families where the parent with low literacy skills can benefit from a structured program that encourages both literacy and early language development.

➤ ***Community Languages***

Massachusetts, like much of the nation, has seen an explosion in the foreign-born population. Since 1990, the state's foreign-born population grew by 14.5 percent, accounting for 26.6 percent of the overall population growth. In response, the MBLC offered a Community Languages program that supports the acquisition of materials in “community languages,” e.g. those languages where there is an expressed need for augmenting current collections either in any of the traditional languages such as Spanish, Chinese, Portuguese and Russian, or in previously less common languages such as Khmer, Tibetan or Somali. In addition, this project supported the acquisition of ESOL (English for Speakers of Other Languages) materials for the many newcomers who seek opportunities to practice the English language, and also materials in American Sign Language.

**Project Outputs**

This program has been especially popular in that many libraries have seen an influx of new immigrants and are hard-pressed to provide materials to support the many volunteer literacy programs and conversation groups that take place in libraries. Twenty-eight libraries have applied for and received these grants over the past four years, for a total of \$577,860, making this one of the most popular programs and demonstrating that it is much needed. The total population served was 81,300.

Another approach to serving the Spanish-speaking population was a project awarded to the Northeast Massachusetts Regional Library System. “Serving Spanish-Speaking Patrons in Northeast Massachusetts” provided much needed training to library staffs in techniques of outreach to a growing population of Spanish-speaking residents served by these communities.

➤ ***Open Project – Wilson Reading System***

Under the Open Project, libraries located in Cambridge, Haverhill, Quincy, North Adams and a consortium of libraries on Martha’s Vineyard used the Wilson Reading System, a highly structured, multi-sensory, phonics-based program developed specifically for learners who have significant difficulty in reading and spelling. This program trained

literacy coordinators in the Wilson method and, using a train-the-trainer approach, taught volunteer tutors who were then matched with adult learners who had dyslexia.

Each library trained two staff people, a literacy specialist and a selected tutor who were selected to learn to become master tutors in the Wilson Reading System. Each literacy specialist worked with an adult learner in order to learn how to use the system. Both received initial training from Wilson Reading system staff and participated in ongoing training via the web. They also participated in online chats set up by Wilson to help people who had questions about how to use the program. They were observed by master teachers from the Wilson staff who supervised them on-site. Tutoring took place at each public library, utilizing meeting space currently available and new computers. Tutors received online support provided by the Wilson Program. Learners had the chance to develop basic computer skills during tutorials and small group sessions. Specialized training helped tutors effectively help learners become more fluent and skilled readers. Tutors and the literacy coordinators attended a meeting with the other funded WRS programs and met with Barbara Wilson, founder of the program, to discuss specific project implementation.

### **Project Outputs**

At the end of the project year, adult literacy specialists had met with learners in more than 100 sessions of approximately 1.5 hours (2 times a week). At least one specialist in each library received their Wilson Certification for Level 1 by the end of the project, which took place over two years.

### **Project Outcomes**

By the end of the project year, at least half of the tutors had brought their students up from Level 1.2 to Level 6. This was a significant achievement, given the complexity of the issue: how to help library literacy programs increase the success rates for adults with dyslexia. The MBLC recognizes the tremendous potential of this excellent program.

### **➤ *Open Project – Reading Partners, Wareham Public Library***

The Wareham Public Library developed an adult literacy program called Reading Partners to meet a critical need for adult literacy services in the area. This was a two-year project. The library hired a dynamic local woman to serve as part-time coordinator to develop the program. Staff contacted Literacy Volunteers of Massachusetts for advice on training guidelines. Local volunteers were recruited and trained; adult learners were assessed and matched with tutors. A network of social service providers was identified. The coordinator provided guidance, promoted the program, and collected data on the activities. The library purchased appropriate new reader materials and provided space for tutoring. The project director and library director met to analyze library space and create better location for tutoring. Publicity materials including non-print ads were developed to advertise the program.

### **Project Outputs**

During the first year of a two-year project, 17 people received training as part of a 15-hour, six-session tutor training program. By the end of the first year, 10 tutors had begun working with 12 adult learners. Seven students are waiting for tutors. A discrete area off of the main reading room was identified and modified for tutoring. Ninety items were added to the library collection including adult new reader and instructional materials. For the two years of the project, 63 tutors were trained. The library received a \$10,000 corporate sponsorship for continuation of the project, and has also received an additional

award from Wal-Mart which has begun talking with the library about providing tutors for Wal-Mart employees. Two-hundred items were added from the library's budget to complement the materials purchased with grant funds.

***Goal 6: Increase public awareness of the intrinsic value of libraries in promoting personal and economic growth for every resident in every community through the wide array of programs and services that libraries offer.***

**Management Objective: Collect, analyze and disseminate data about libraries and their programs and services.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

The MBLC collects and analyzes financial, demographic and personnel information about all types of libraries. The data is compiled and published each year in a series of reports that are distributed to public, school, academic and special library directors, as well as public library trustees. Customized statistical reports are created for libraries and for state and municipal officials. In addition, the Board actively participates in the Federal-State Cooperative System (FSCS), the State Library Agency Survey and the Academic Library Survey. All collected data is also available on the Board's Website.

The activities of this program were collecting, analyzing, and verifying data from public, academic, school, special and multi-type libraries. Twelve workshops for public libraries on how to report on, interpret and use data were held. Staff also certified municipalities whose libraries met statutory and regulatory requirements for the \$8 million Massachusetts State Aid to Public Libraries program. In order to ensure that communities are served by qualified library personnel, the Board granted Certificates of Librarianship to applicants based on work experience or education level as set forth in statute and regulation. The certificates are required of all Massachusetts public library directors as a prerequisite for municipalities to receive State Aid to Public Libraries. In addition, a survey of library trustees and a survey of Friends of Libraries in Massachusetts were conducted.

**Project Outputs**

Surveys were distributed yearly to over 2,200 libraries. Data collected on these surveys was compiled into 15 printed data reports covering public, school, academic and special libraries. In addition, these reports were put into PDF format and, along with the raw data, mounted on the Massachusetts Board of Library Commissioners website (<http://mblc.state.ma.us/advisory/statistics/>) for librarians and others to download and analyze. In late summer, State Aid Workshops were held (six in 2005) throughout the state with the purpose of clarifying the year's State Aid forms and explaining the State Aid to Public Libraries program. The Head of State Aid and Data Coordination and the State Aid Specialist reviewed the State Aid forms, answered relevant questions and discussed current developments in the State Aid Program. In 2005, 158 attendees included directors, library staff, MBLC staff and trustees. In early summer, workshops were held (six in 2005) statewide to work with public librarians supplying non-financial data. In 2005, 92 library

directors and staff attended these instructional sessions. There were 338 applications reviewed and approved for state aid, and 63 Certificates of Librarianship issued. The bimonthly print newsletter, Public Library Facts, available in electronic form on MLIN, covered topics outside of the annual data reports such as Forms of Municipal Government, Adaptive Technology in Libraries, How Massachusetts Ranks and early release of operating income and expenditure summary statistics.

**Goal 6, Objective 1: Manage and expand the statewide public awareness campaign to inform Massachusetts residents of the value of libraries for personal and economic growth in every community and the essential role of librarians as information professionals.**

*Massachusetts made progress toward this goal, using the following strategies, services, and activities.*

➤ **Statewide Public Awareness Campaign**

The goal of the Massachusetts Board of Library Commissioners is to increase public awareness of the value of libraries as community resources, and also the role that the Board serves as an advocate for libraries and improved library services to the residents of the Commonwealth--to inform citizens across the Commonwealth that libraries have something for everyone. The year 2005 used as a theme "It's Where Family, Technology and Community Converge." This public awareness campaign was coordinated with regional library systems and relevant professional library associations and organizations such as MLA, MLTA, MFOL, MSLMA, SLA/Boston Chapter, ACRL/NEC.

**Project Outputs**

The following is a list of MBLC publications. Although this list is for FY2005, it remains typical of the agency's output: [Yearly] Annual Report, MBLC Notes (published bimonthly) Directory of Architects Who Have Designed for Construction Grant Recipients, Emergency Assistance Program for Massachusetts Libraries and Archives, Library Emergency Checklist, Library Services and Technology Act - Massachusetts Long range Plan 2003-2007, Massachusetts Library Data Reports – School, Academic and Special Massachusetts Public Library Data Reports – Children's Services, Circulation & Holdings, Electronic Services, Featured Reports, Financial Statistics, Personnel: Salaries, Personnel: Education & Staffing, Public Library Outlets, Rankings of Public Libraries, Services, and Summary Tables & Graphs, Massachusetts Public Library Trustees Handbook, Massachusetts Special Collections Directory, Preservation Program, Strategic Plan for the Future of Library Services in Massachusetts, The Municipal Pie...What's Your Library's Share?

As well as the above publications, a statewide campaign was designed and implemented to promote the 2005 Statewide Summer Library Adventure, "Going places @ your library". This featured two ads that were shown on more than 300 movie screens across the state during June 2005.

A public awareness campaign involving "bus queens" on transit lines throughout the state, with the tag line "Your library, think of it as an extended bookshelf," promoted electronic resources funded by LSTA. Finally, 20 press releases were sent out by the Board throughout the year that generated stories in many of the daily and weekly papers. In

addition, the news media also called the Board for information on a wide range of topics from LSTA grants, construction funding and censorship while writing stories about libraries in Massachusetts

➤ ***Statewide Data Coordination and Analysis***

The Board collects and analyzes financial, demographic and personnel information about all types of libraries. The data is compiled and published each year in a series of reports that are distributed to public, school, academic and special library directors, as well as public library trustees. Customized statistical reports are created for libraries and for state and municipal officials. In addition, the Board actively participates in the Federal-State Cooperative System (FSCS), the State Library Agency Survey and the Academic Library Survey. All collected data is also available on the Board's website.

Workshops for public libraries on how to report on, interpret and use data are held. Staff also certify municipalities whose libraries meet statutory and regulatory requirements for the Massachusetts State Aid to Public Libraries program. In order to ensure that communities are served by qualified library personnel, the Board granted Certificates of Librarianship to applicants based on work experience or education level as set forth in statute and regulation. The certificates are required of all Massachusetts public library directors as a prerequisite for municipalities to receive State Aid to Public Libraries (approximately \$8 million per year). In addition, a survey of library trustees and a survey of Friends of Libraries in Massachusetts are done.

Surveys are distributed to over 2,200 libraries. Data collected on these surveys is compiled into fifteen printed data reports covering public, school, academic and special libraries. In addition, these reports were put into PDF format and along with the raw data, mounted on the Massachusetts Board of Library Commissioners website at <http://mblc.state.ma.us/advisory/statistics/>, for librarians and others to download and analyze. The bimonthly print newsletter, Public Library Facts, available in electronic form on MLIN, covered topics outside of the annual data reports such as, Forms of Municipal Government, Adaptive Technology in Libraries, How Massachusetts Ranks and early release of operating income and expenditure summary statistics.

**Goal 6, Objective 2: Offer opportunities for individual libraries, regions and networks to participate in the statewide campaign by using local approaches whenever possible.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

➤ ***Statewide Public Awareness Campaign—Part 2***

During FY2003, the theme for the Public Awareness Campaign, *Your local library has something for everyone. It's where families, technology and community converge*, was highlighted in a four-color hand card distributed at every public library in the state that several libraries personalized by printing their own information on the back. In addition, a new section on the Board's Web site highlighted more than 250 *Massachusetts Library Users Sharing Their Stories*.

In FY2005, the Board continued its promotion of the Statewide Summer Library Adventure, *Going places @ your library*, through advertising at movie theaters across the Commonwealth. Two slides, “Pile on the excitement” and “Reading brings you to new heights,” were shown to encourage children and adults to join the Summer Reading Adventure and experience going away without having to travel further than your local library. This was expanded in FY2006 with a Tool Kit that included 30-second PSA scripts, as well as black & white ads, that were produced so that local libraries could personalize them for their local papers, newsletters or radio stations.

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

**Goal 6, Objective 3: Support approaches, strategies and programs that increase community connectivity, build social trust, and affirm the value of libraries as centers of civic life.**

***Massachusetts made progress toward this goal, using the following strategies, services, and activities.***

➤ ***On the Same Page***

“On the Same Page” is based on the concept of a community reading program where people are engaged in reading the same book. It has been a successful program since 2003 when it was first introduced. For the past four years, 35 libraries have applied for funds to promote discussion of a shared book. Another eight libraries have applied under the 2006-7 grant round and will begin their projects in fall 2006. The project aims to build a community of readers by providing opportunities for their citizenry to engage in thoughtful discussion of the same title. Libraries developed strategies for spreading information about the program by working with local schools, bookstores, colleges and universities, newspapers, councils on aging, resident homes and other locations that would serve as locations for a series of coordinated book discussions. Many corollary activities that supported the book discussion were offered ranging from concerts, plays, pageants, author visits, lectures and many more creative events. The libraries experienced high visibility within the community and in some cases attracted attention at the statewide level. For example, in spring 2005 the editorial page of the Boston Globe featured a glowing tribute to the many towns that were engaged in “one book” efforts.

These projects have been funded across the state from north of Boston to Cape Cod and from the Berkshires to Central Massachusetts. It has been especially gratifying to see the number of small libraries that had never applied for LSTA funds who have embraced this project. Indeed, the towns of Wendell and New Salem, which have less than 1000 inhabitants each, applied for and successfully carried out a project. Several towns, including Wendell, used this program to raise awareness about value of the library as a central community organization and were able to build upon the momentum to subsequently write a successful proposal for state construction funds.

As the director of Wendell notes, “The primary objective of the project was to establish an annual reading event for the adult population of the towns of Wendell and New Salem. Secondary objectives included broadening outreach services and to increase

overall awareness of library services in our communities. Small as they are, we know our libraries have a great deal to offer and we strive to have them be vital participants in the daily life of our communities.” Wendell followed its first successful annual reading effort with a second year (with local funds), and then a third. All of this was accomplished because of the knowledge and training gained with their first, successful LSTA grant. As the director notes, “From our perspective, this LSTA sponsored program has been an outstanding success. With the support from this grant a solid foundation has been laid for a program that can and will build on itself in the years to come. We know that it has brought in new readers, introduced non-readers to books on tape and introduced participants to the many services our libraries have to offer”. In the first full two years of the program at least 14,251 people in communities large and small have actively participated in a variety of activities centered around the theme of “one book”.

## Results of In-Depth Evaluation

For the in depth evaluation section of the Massachusetts 2003-2007 Long Range Plan, we have chosen to focus on Goal #1, the goal which addresses the Commonwealth’s resource sharing infrastructure, provision of digital content, and access to and preservation of materials. The programs and activities supported by Goal #1 have reshaped the way users think about their libraries and raised their expectations significantly. Massachusetts has a nearly 30-year history of promoting and supporting automated resource sharing networks, interoperability between networks, and providing smaller libraries with the means to participate more fully in resource sharing. Since 1996, the Commonwealth has provided access to full-text periodical content. Massachusetts has also provided robust support for preservation of library and archival materials, emergency assistance and disaster preparedness. Finally, Massachusetts LSTA funds are being used to foster individual digital collections and the coordination of those collections into a Digital Commonwealth.

***Goal 1: Enhance Massachusetts library resources and their accessibility to residents by building the technological infrastructure needed to link all types of libraries and by promoting preservation and access.***

Coordination: Automated resource sharing networks, cooperating library groups, regional library systems, and other organizations working to preserve and digitize resources.

Strategies for Implementation: Statewide Programs, Publications, Institutes, Direct Grants.

**Goal 1, Management Objective: Improve the technological capabilities of Massachusetts libraries, automated resource sharing networks, regional**

**library systems, and other cooperating library groups through direct staff consulting, electronic and print publications including annual data collections and reporting, and support services.**

Direct staff consulting is an integral part of activities falling under Goal 1. The MBLC convenes meetings with network administrators five to six times per year, in which LSTA grant opportunities, strategic directions, planning requirements, and the need for continuing education are discussed. Similar meetings are held with Regional Administrators and regional presidents, where likely regional and multi-regional project ideas are floated.

MBLC staff regularly attended state and national conferences to stay informed and provide guidance to Massachusetts libraries in the areas of resource sharing, digital content, preservation and disaster planning.

The MBLC invites networks to respond to draft grant fact sheets and application forms before they are approved by the Statewide Advisory Council for Libraries (SACL).

MBLC staff strongly encourages all applicants to discuss grant application ideas and share drafts for feedback before applications are submitted.

MBLC staff works with regional “help desk” staff to ensure ongoing access to electronic databases from home and the library, and sets up regular, coordinated training for libraries on database products. The MBLC Web Site provides a portal for statewide remote access to state, regional, and some network databases. Remote access data are captured and reported by the web site. The web site also serves as well as a single point of access to the statewide virtual catalog.

Staff run the large, complex procurements necessary to obtain statewide licenses to electronic content. Statewide database licensing has resulted in the equity of access to full text electronic resources for all residents from the Commonwealth. Current licensing agreements provide statewide in-library and remote access to thirteen databases from Thomson Gale. Between 2003 and 2006, the total number of sessions rose from 2,186,486 to 2,826,923 and the total connect time rose from 16,576,629 minutes to 24,857,215 minutes.

Since November, 2005 MBLC staff have led two statewide task forces efforts essential to the continuing health of statewide resource sharing. A delivery task force is charged with establishing best practices, increasing efficiency, and finding ways to have automated systems work more seamlessly with the statewide delivery system.. An authentication task force is investigating ways to improve remote use of electronic content, and adapt library identity management practices, authentication and authorization practices to meet the expectations of users on the contemporary Internet.

News articles are written and submitted to MBLC Notes or disseminated via regional print newsletters or over the MBLC-managed statewide email distribution lists

that reach approximately 2,500 Massachusetts library staff. MBLC also appear as speakers at conferences.

Since 2003 MBLC has implemented an annual network survey that tracks core outputs of automated network activity.

MBLC staff serve *ex officio* on the newly created Digital Commonwealth executive committee, the MassCat<sup>1</sup> regional union database steering committee, and is the convener of the statewide virtual catalog members council.

MBLC staff serves as the statewide E-Rate coordinator for libraries, reviewing approving technology plans, primarily network plans, for the Schools and Libraries Division of the Universal Service Administrative Corp.

**Goal 1, Objective 1: Support the development of the technological infrastructure needed by Massachusetts libraries to access library automation and electronic information services and extend these resources to the community.**

*Massachusetts made progress toward this goal, using the following strategies, services, and activities.*

➤ ***Network Connections and Servers and Network System Upgrades***

Massachusetts' nine automated resource sharing networks began over twenty years ago, when the Minuteman Library network formed in the metrowest Boston area in 1984. Though operating expenditures can be covered by member library assessments and state funds, the large capital expenditures for purchasing new integrated library system software, servers and telecommunications equipment has been supported by LSCA, and now LSTA funds. Resource sharing is the primary justification for the development and support of the automated networks, not circulation, cataloging, or acquisitions. Massachusetts does not support stand-alone automation projects.

Automated networks apply for equipment and eligible software offsets on the annual direct grant calendar. As with other direct grant applicants, all networks must have an updated long range plan on file, and all members of the network must also be members of a Massachusetts regional library system.

After the serious fiscal crisis suffered by Massachusetts beginning in 2002, LSTA funds have helped to stabilize the automated networks over the last three years, by allowing for a higher percentage of grant funds to go toward capital projects, and more types of equipment to be eligible.

## **Project Outputs**

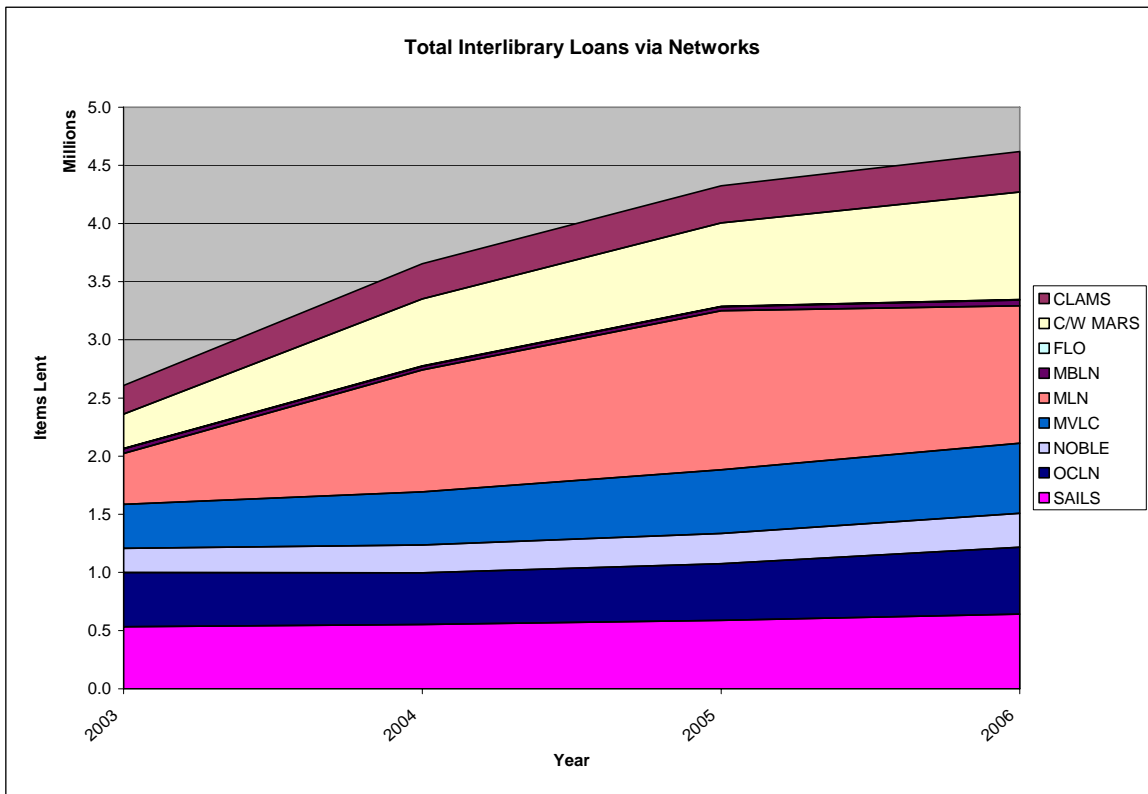
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<sup>1</sup> MassCat is a union catalog of approximately 140 school and special library holdings. Five of the six Massachusetts regional library systems provide MassCat as a regional service for a highly –subsidized annual fee. [www.masscat.org](http://www.masscat.org)

Between FY2003 and 2007, of the 24 Network Connections and Servers or Network System Upgrade projects awarded, 18 have benefited all the libraries in the network and six projects benefited some of the members (233 total buildings). Approximately \$2.3 million dollars in LSTA funds has been awarded.

Automated Network Crosstab – By Member Types										
Membership Type	Total	C/WMARS	CLAMS	FLO	MBLN	MLN	MVLC	NOBLE	OCLN	SAILS
Full	279	57	25	9	6	41	34	28	28	51
Mini-net	46	46	0	0	0	0	0	0	0	0
On-line affiliate	38	37	0	0	0	0	1	0	0	0
Total:	363	140	25	9	6	41	35	28	28	51

Automated Network Crosstab – By Library Types										
Library Type	Total	C/WMARS	CLAMS	FLO	MBLN	MLN	MVLC	NOBLE	OCLN	SAILS
Public	302	124	24	0	3	35	35	17	26	38
Academic	39	10	1	8	1	6	0	9	2	2
School	15	2	0	0	2	0	0	1	0	10
Special	7	4	0	1	0	0	0	1	0	1
Total:	363	140	25	9	6	41	35	28	28	51



The chart above shows figures from the period previous to the start of this five year plan. Here, interlibrary loan should be seen not in a traditional sense, but as composed of network transfers (most of the traffic), virtual catalog loans and peer-to-peer loans via email templates.

The big story is the incredible increase in resource sharing over the last five to ten years. The amount of resource sharing has almost exactly doubled (99.7%) over the last five years.

If we go back to 1997, the amount of resource sharing was below 1 million items per year. Indeed, Massachusetts has now reached a point where the delivery system can no longer sustain the traffic without systemic change and significantly more statewide coordination. We are, in a sense, victims of our own success.

This table shows change in the actual first four years of this plan:

Network	2003	2004	2005	2006	Change
CLAMS	245,893	302,160	320,218	347,681	41.40%
C/W MARS	294,665	576,655	715,731	923,425	213.38%
FLO	3,085	3,847	4,470	5,116	65.83%
MBLN	41,114	30,747	34,488	48,666	18.37%
MLN	436,133	1,048,165	1,365,564	1,182,409	171.11%
MVLC	377,892	457,581	549,125	601,840	59.26%
NOBLE	209,698	238,154	258,631	292,170	39.33%
OCLN	465,561	444,624	488,389	575,017	23.51%
SAILS	532,746	552,206	587,690	641,999	20.51%
Total	2,606,787	3,654,139	4,324,306	4,618,323	77.17%

An article in the Boston Globe proclaims the value of resource sharing clearly:

- *During the past year or so, I've been on a squirrel binge. I've ordered titles ranging from "North American Tree Squirrels" (my bible on squirrel behavior) to children's books. My squirrel books come from the 40-plus public and academic libraries across Eastern Massachusetts that belong to the Minuteman Library Network. If I couldn't use this network, I'd have to lay out a lot of bucks and time to locate and buy these books.*

TRUE CONFESSIONS OF A HEAVY LIBRARY USER,  
Susan Weiner  
August 28, 2005  
Globe West, p12

After Minuteman's system upgrade, a 2003 user survey revealed comments such as these:

- *I love that I can not only search the catalog from home, but also that I can request titles from member libraries so easily! It's fantastic! I love it I love it I love it! THANK YOU!*
- *This is a terrific resource. I sometimes have to prepare papers for classes at Harvard, and I am often able to avoid using the labyrinthine Harvard library system because I can find what I need at Minuteman. Thank you!!*

At the same time, users provided plenty of constructive criticism, indicating how current library catalog interfaces no longer meet the expectation of regular Internet surfers, users who are accustomed to the more current and rapidly innovating web sites of commercial providers such as Amazon.com or Google.

Holdings of the networks have held reasonably steady. As of July, 2006 the nine automated networks accounted for a combined 10.3 million titles<sup>2</sup>, 34.6 million holdings, and 45.7 million circulations. Total titles and holdings are increasing only marginally at 11% and 6% respectively; the networks are mature and do not often add new members – an earlier justification for system upgrade and telecommunications equipment grants.

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<sup>2</sup> Titles were not deduplicated between networks.

A corollary benefit of these grants is that they prepare the network to fully participate in the statewide virtual catalog (see below). For example, it is only after upgrades to MVLC's servers, integrated library system, and telecomm network, that MVLC finds itself finally in a position to allow its users to do direct distance borrowing on the statewide virtual catalog beginning August, 2006.

Many systems could not offer patrons personalized services, such as new materials RSS feeds (an additional report to strain the ILS) without system upgrades. Patrons in the SAILS network could not even depend on circulation transactions completing until central site servers were replaced with more robust equipment.

### Telecommunications Infrastructure

Public and staff access network services, such as the online catalog, and access to the Internet is provided by the automated networks. Annual costs are borne by the libraries (with the help of E-Rate discounts), and are subsidized with state funds. However, the telecommunications infrastructure, the wide area networks connecting members to their central site and the Internet, is largely funded through LSTA grants. Unlike many states, Massachusetts does not have a statewide telecommunications network for public entities, such as schools, libraries, and town halls.

LSTA funds have supported the build out of wide area networks for all automated networks except Fenway Libraries Online, whose libraries use their academic campus' Internet for communications with the central site. For the remaining eight networks, between 2003 and 2007, LSTA funds will have provided, five new central site backbone routers, 380 library routers (main and branch buildings), 335 switches, and related equipment. At the end of this FY07 Massachusetts will have completed a replacement cycle for network telecommunications equipment, updating the original TCP/IP networks that were put in place between 1996 and 1999 when graphical Internet was still relatively new.

There are numerous advantages to having established these large library networks, some of them unforeseen. C/WMARS with 169 dedicated circuits is a "large-customer" of Verizon. This gives them enough influence to have Verizon pull new circuits to library locations where no other options for broadband Internet access exist. Eight Massachusetts networks file E-rate applications, and eight technology plans are written on behalf of 345 of the state's 370 public libraries, and approximately 450 service outlets. Other economies of scale pertain in the purchasing of equipment, electronic databases, and maintenance contracts, as well as the provision of centralized technical support, cataloging, and library web hosting. Libraries rely thoroughly on their networks.

When a library's router fails, it can no longer provide core services, such as OPAC lookups and circulation; the library ceases to do business entirely. When a network's backbone router fails, all member libraries cease to do business. As equipment becomes "end-of-life" parts become scarce, expertise on that equipment becomes rare, and repairs become inordinately expensive. The large investment in new equipment over the last four years has reduced service interruptions in libraries.

New features in the routers and switches remove bottlenecks from contending ethernet traffic on the local area network, and provide additional security through Virtual LAN (VLAN) segmentation. VLANS have been implemented in a small subset of libraries so far; however, they have enabled staff computers to remain secure from public

access workstations, which helps prevent hacking of protected data and transmission of viruses and worms

In FY05, the NOBLE network undertook a pilot project using “Bluesocket” devices to control wireless access in member libraries. These wireless gateways, segregate wireless connections completely from the rest of the library LAN and can limit the bandwidth, so laptops don’t squeeze out other library workstations. NOBLE services had been seriously compromised by a well-publicized virus outbreak in the fall of 2003 –news stories and television coverage described the unhappiness of library users– and was unwilling to allow wireless access over its telecommunications network without security guarantees. After the installation of the Bluesocket gateways, seven NOBLE libraries deployed wireless services to their users. Since then a number of other libraries and networks have purchased Bluesocket gateways. A member of MVLC, the Reuben Hoar Library in Littleton reports:

- *Wireless has made a big difference in the atmosphere here in Littleton. Customers enjoy the freedom of using their own laptops instead of waiting for one of the library’s Internet computers, and they tell us so. We’ve had business folks and students spending whole days with us. ...Wireless has also contributed to the success of our LSTA statewide database promotion grant.*

In FY07, four networks will install a new breed of firewalls to protect their networks. These new firewalls will replace equipment that is not large enough, causing bottlenecks in traffic, and are no longer supported, so it is difficult or impossible to repair them. As the SAILS Network points out in their application’s statement of need,

- *If the network firewall was to fail now we would immediately have to bring all services off-line to protect the servers at the central site as well as the 800+ desktop devices connected to the network. Failure to do so would be catastrophic....resulting in almost irreparable damage.*

The new firewalls provide a next-generation approach to security that should not only prevent viruses, worms, and denial of service attacks, but also isolate problems if the network becomes infected. In 2005, MVLC spent several weeks chasing viruses around the network as computers were cleaned, and then became re-infected by another library’s devices soon thereafter.

A large number of small to medium size libraries have struggled along with low bandwidth dedicated circuits (56K). By combining LSTA funds with the Massachusetts Bill and Melinda Gates Foundation “Staying Connected” grant, approximately 56 member libraries will have increased bandwidth to fractional T-1 (384K) capacity or greater by the end of FY07. Five networks have members falling into this category.

Again using a combination of LSTA and Gates Staying Connected funds, five networks have installed “Packet Shapers” at their central sites, and two networks have installed a total of 24 packet shapers in library buildings. Packet shapers, provide fine-grained control over network traffic to those sites, and improve response time by compressing data intelligently. Integrated library system transactions, and searching statewide electronic databases can be given highest priority, while bandwidth hogging applications like peer-to-peer file-sharing programs can be limited. MVLC, which was the first network to use packet shaping reports that it has allowed the network to avoid moving a number of libraries with 384K connections to more expensive full T-1 circuits

and given them sufficient reliable bandwidth to move to the next release of their integrated library system software. Another network reported that the download time for new java files necessary for staff functions was reduced from 40 minutes to 3 minutes, thereby freeing staff time and staff computers for other activities necessary to open the library on time.

Through replacement and upgrading of central servers, core services to libraries are maintained and improved. SAILS patrons certainly noticed when their circulation transactions were not recorded properly due to an over-stressed database server. The OCLN network had to take its system down early on Friday evening to do its only full backup each week; the OPAC and circulation system became unavailable for six hours or more. No additional reports could be scheduled due to the increase in the system load. New equipment grants have drastically improved these service bottlenecks. OCLN is able to do full backups nightly, and has reduced nightly offline time from 2.5 hours to 10 minutes, a 93% improvement. After improvements libraries and network central site staff spent far less time logging and troubleshooting helpdesk tickets.

Many networks would be unable to move to the next “release” of their integrated library system software without LSTA support. New servers, new operating systems, and sometimes additional telecomm are all required to make the jump. In addition to providing new user interfaces and additional functionality for patrons, system upgrades have been necessary for very pragmatic reasons, including: installing patches that address inefficiencies in the way that reserves are handled, inefficiencies that contribute to the statewide delivery problems; and providing baseline compatibility with statewide virtual catalog project.

➤ ***Small Libraries in Networks***

The Small Libraries in Networks program (SLIN) was conceived as a way to bring small public libraries, in communities under 10,000 population, who were not already circulating members of networks, into one of the eight networks that support public libraries. Any network startup fees were offset, telecommunication equipment purchased, and there was an ongoing offset to the annual fee charge for network membership. MBLC has frozen the program is and unable to allow new libraries to join until state funding becomes available.

In FY2007, SLIN funds are being used in synergy with state telecommunications funds and Bill and Melinda Gates Foundation “Staying Connected” grant funds to ameliorate longstanding Internet connectivity problems with some very small libraries in the western part of Massachusetts. Approximately 32 small public libraries will move from dial-up, 56K, or no available Internet connections to a broadband connection.

**Project Outputs**

At its height (FY03) 63 libraries participated. With no additional funding to support additional participants or increased levels of participation, two LSTA awards were made to support the 58 libraries in C/WMARS and the five libraries in the Merrimack Valley Library Consortium (MVLC) that had signed up during FY2002 and FY2003 at existing levels. Two libraries have dropped out of the program since 2003.

Even without additional SLIN support, several libraries have increased their network membership from an affiliate level to a full circulating member. The SLIN got them through the door.

MVLC has charted participation in reserves by its five SLIN participants for the last two years. Borrowing of and lending of materials by SLIN participants increased significantly. In the most extreme case, Groveland users borrowed 10 items on MVLC in 2002 and 2,248 in 2005; they lent 45 items in 2002 and 2,248 in 2005.

A number of directors of SLIN libraries have stated that they would be unable to maintain membership in a network without the annual support provided by the program. A total of \$508,906 has been spent in the SLIN program since 2003.

**Goal 1, Objective 2: Support the planning and development of a digital library for Massachusetts to include the virtual catalog\*, patron authentication service\*, licensed databases, online reference services and enhanced access to periodical articles not available online.**

*Massachusetts made progress toward this goal, using the following strategies, services, and activities.*

➤ ***Statewide Virtual Catalog***

The Statewide Virtual Catalog allows library users to locate and request materials (books, audio, and video) via a single search interface. Using the “direct distance borrowing” model, the system works with each target catalog, automatically place reserves in the lender’s circulation system and creating temporary records in the borrowing library’s local circulation system. The virtual catalog obviates the need for professional interlibrary loan staff to mediate these requests, resulting in faster server, and resource savings on the part of both the lending and borrowing library. It also empowers end-users to discover items that they might not know existed, and to request them without needing to ask for help. This is a mode of doing business which more and more library users desire (OCLC Environmental Scan, 2003), and are being trained (“The Future of the Internet”, Pew Internet and American Life Project, 2005) to use..

Though the Statewide Virtual Catalog began using capital state technology funds, its management and growth has been supported by LSTA since the spring of 2004. LSTA ensures that the ongoing hosting and management of the actual virtual catalog server, as well as the Internet service that connects the system to the public and to the 15 library systems which it searches. MBLC has contracted out these services to the University of Massachusetts at Boston, which also provides a help desk function, a project web site, statistical reporting, training, setup of new participant systems, and management of the users group.

MBLC staff run the members council, the group that makes policy and strategic decisions on the direction of the project. In FY05, MBLC ran a special direct grant round inviting two of the four independent state colleges to join the virtual catalog, since all nine automated networks were now participating. Westfield State College and Bridgewater State College came on board in time for the fall 2005 semester. No additional systems will be added until the project migrates to a newer version of the system during the winter of 2006/2007.

**Project Outputs**

Statewide Virtual Catalog Lending statistics show a rapid increase, as targets have been added, patrons become able to make unmediated requests on the system, and the

value of the service becomes more widely known. In state FY2003, 30,045 loans were filled via the Virtual Catalog. However, during the winter of 2003/2004, the Boston Library Consortium left the project, so more than seven large library systems were no longer available. This led to a drop in lending to a little less than 25,000 in FY2004. Since then, all nine networks are participating in the virtual catalog and lending has increased by 288% to 71,589 at the end of state FY2006.. Fenway Libraries Online (FLO) took nearly 1 year hiatus, as it resolved technical difficulties. As mentioned earlier, MVLC has not yet opened up unmediated borrowing to its patrons, but should have done so by the time this report is published.

Once the virtual catalog has migrated to a new platform during FY07, MBLC will look at the remaining two independent state college catalogs, the MassCAT union catalog, and other stand-alone systems, to make as comprehensive a resource sharing system as possible.

➤ ***Statewide Licensed Databases – InfoTrac from Thomson/Gale***

Providing statewide licensed databases guarantees a core set of resources to the residents of Massachusetts, ensuring equity of access, whether one lives in an urban area or a remote, rural village. The 13 primarily full-text and image databases cover general, health and business information, as well as materials specifically selected for K-12 students. The databases are funded through a combination of state and LSTA funds. Statewide access is available in all 1700+ regional member libraries, as well as campus-wide access for K-12 and academic institution members. Remote access from home is also available 24/7.

The LSTA project manager troubleshoots questions from the regional help desk staff, and meets with them as a group at least once a year to review procedures and system changes. The project director also maintains frequent contact with appropriate staff from the vendor to keep apprised of updates and communicate concerns when they arise. Web pages on the MBLC website are updated regularly by the project director to communicate important information to regional member libraries and the public using the databases. Regional listservs and group emails are also used to communicate database information updates in a timely manner. Questions received directly from the public and regional member libraries are either handled by the project director or forwarded to the appropriate regional or library staff member. The project director prepares and shares database usage statistics for the regions and state as a whole. The Library Information Systems Specialist maintains a script for authentication for remote access and is involved in decision-making and trouble-shooting problems as needed. Five hundred and sixty-four library staff members completed an online survey to help evaluate the databases for future database contracts. Database access for new regional members is handled through the regional library systems, which also provide help desk support for connectivity for existing members.

**Project Outputs**

In FY06, there were 2,826,923 database logins, a 23% increase over FY03. The databases are also part of many libraries' information literacy curriculum, whether through an LSTA Information Literacy grant program that we offer, or through their own locally funded teachings. A user-friendly database brochure, written by the project director and designed and printed by the vendor was updated is available in PDF format from the MBLC website. 100,000 brochures were sent to all regional K-12 and academic library

members. In addition, the brochures and a one-page flyer designed by the project director and Print and Operations Specialist were distributed to members of the legislature on MLA Library Legislative Day and Ways and Means Day, as well as at other meetings between the MBLC Executive Director and members of the legislature. The project director communicates necessary database information to the regional administrators and network administrators at their monthly and bimonthly meetings, respectively. MBLC notes and regional newsletters also print articles about the statewide databases prepared by the project director. Since FY03, over 600 regional, network and library staff members attended 21 MBLC sponsored databases training sessions and user group meetings conducted by Thomson/Gale's professional trainers. In addition, regional staffs provide hands-on training to their members in the use of the databases.

➤ ***Open Project – MassAnswers, Boston Public Library***

Funded as an Open Project, MASSAnswers was a two-year, collaborative statewide virtual reference project of the Boston Public Library (BPL) and the other regional reference centers. Through the use of 24/7 web conferencing software, MASSAnswers connected users with libraries and librarians on the web permitting real-time, online reference interviews via the web by “chatting” with users online and “pushing” web pages to users in response to their queries. Through collaboration with the Metropolitan Cooperative Library System in California this service was available 24/7, 365 days a year.

This exemplary project successfully brought together key reference librarians from the largest public libraries in each of the Massachusetts Regional Library Systems to provide a new type of statewide reference service to Massachusetts' residents. The project sought new ways to bolster the lagging use of in-library public reference services, while reaching out to the web-savvy public who might not have the time, desire or means to go to their libraries physically, but would benefit and appreciate tapping into library services online. The project librarians came away from the project skilled in new ways to deliver a familiar service, confident in the newfound abilities of themselves and their staffs to excel in an online chat environment. They also assured that a segment of their constituency that has rediscovered, or discovered for the first time, how their public libraries may be meaningful to their lives, can have easy access to reference librarians to help them with their questions and to navigate library collections.

One of the main factors in making the project a success was the enthusiastic involvement of the libraries participating in the project. Without their dedication to the project in the form of staff and time, the project would not have been a success. Prior to submitting their application, the BPL enlisted the commitment of the regional reference centers to the service, involving them in the project at the conceptual stage. Memorial Hall Library of Andover, one of the regional reference centers already offering the service through their web page agreed to assist with training for the other project libraries. Seven months into the project, MassAnswers went live. The MassAnswers reference librarians continued to hone their virtual reference skills through training sessions with 24/7 staff and Memorial Hall's guidance. A logo was designed, as well as project web pages. Project librarians served on a MassAnswers Advisory Committee that met periodically to assess the project and share ideas. Although several of the project libraries had staff shortages, they never wavered in their desire to offer the service.

**Project Outputs**

While all project members could retrieve their own statistics, BPL compiled project statistics and encouraged Massachusetts libraries to put links to the service on their web pages. For the duration of the project, of the 10,847 questions received through MassAnswers URLs, 1,979 were answered by MassAnswers Project Librarians, with the remaining 8,868 questions handled by non-project librarians. Project librarians answered 9340 questions from other 24/7 users while on duty.

Under BPL's leadership, the project librarians discussed future governance issues and how they could go forward after the LSTA grant ended. None of the participating libraries desired to terminate the service, or ask BPL to relinquish their leadership role. MassAnswers has since continued and has even added five more libraries to bolster its number of reference library staff available to field questions. MassAnswers has since weathered the acquisition of 24/7 by OCLC and integration with its QuestionPoint software and continues to be a valued service by the libraries staffing it as well as those having received assistance through it.

**Goal 1, Objective 3: Ensure access to information by preserving significant source materials in their original format, reformatting or copying materials at risk of loss, providing information on appropriate environmental and physical storage conditions and offering training in disaster preparedness.**

### Statewide Programs

The MBLC has maintained an *Emergency Assistance Program* and an Environmental Monitoring Program for libraries and archives in the Commonwealth, as well as the direct grant programs.

The Emergency Assistance Program has four components that lead towards the Agency's ability to assist libraries and archives in the event of a disaster. These include: a training program in which some dozen disaster preparedness workshops are offered annually; 100 Rescubes, two ReactPaks, and a min-max thermohygrometer are located at each of sixteen libraries to be used by any institution suffering a disaster; technical assistance from the Agency staff as well as from the Northeast Document Conservation Center (NEDCC) if Agency staff is unavailable; and packing, freezing, and drying capabilities through Munters Moisture Control. This program has provided institutions with knowledge and assistance on numerous occasions when there have been leaks, flooding, or other problems.

In conjunction with the training component of the Emergency Assistance Program, the staff has demonstrated *dPlan: the Online Disaster Planning Tool* that was created by the NEDCC and the MBLC with IMLS funds. This tool allows institutions to gather the pertinent information, input the data based on the type of institution, location, geographic environs, collections, and many other components; and eventually produce a disaster preparedness plan for the institution. Located on a secure website and password protected, *dPlan* will allow many institutions to create their own disaster preparedness plan much more easily than in the past. Moreover, much of the information that is normally included in such a plan is automatically included in the final printed version based on the information that is included and checked off. Also, suppliers, resources, and contact information that is pertinent to a large number of

institutions in a geographic area will be kept up-to-date by the developers of *dPlan* and those who provided the information initially.

The ***Environmental Monitoring Program*** has provided institutions throughout Massachusetts with the opportunity to monitor their temperature and relative humidity as well as get readings on light and ultraviolet radiation levels in their collection areas. Generally digital temperature/relative humidity dataloggers are installed in fifteen institutions in February and again in August. They are retrieved in July and January. The dataloggers are installed in the local history/special collections areas, the general stacks, and outside the building. The one outside the building is to provide comparative information and to indicate how much the internal temperature and relative humidity fluctuations are influenced by the external ones. If an institution has more than the two internal locations mentioned above to monitor, arrangements are made beforehand as to the number of additional dataloggers needed. On occasion as many as eighteen dataloggers have been installed in a single large academic institution. In addition, to provide baseline information to the institution's staff, temperature, relative humidity, light, and ultraviolet (UV) radiation readings are taken at the time of installation and again when the dataloggers are retrieved. While this does not give the staff an overall set of readings for light and UV radiation, it does provide indications as to whether the levels are acceptable or too high. Subsequently, the data is analyzed and the institutions receive a detailed written report with graphs and other visual presentations of the information. Given the number of dataloggers and the subsequent reports generated, it is nearly impossible to provide a detailed analysis of the results. However, some general trends can be discerned from the data. In the summer, the majority of institution experience temperature and relative humidity levels that are well above the recommended maximum. It is also not unusual for there to be a significant amount of fluctuation in both areas. These conditions accelerate the chemical deterioration of the materials and potentially create an environment that is conducive to mold growth and other biological problems and deterioration. In the winter, because of the heating systems and their desiccating effect, the temperature tends to be a bit more stable, but the readings tend to fluctuate more on a regular basis because of thermostatic changes from day to night and from the week to the weekend. At the same time, the relative humidity readings are often well below the recommended minimum. This latter situation creates a situation where the materials are desiccated and become brittle causing mechanical damage. Overall, it can be said that the environmental monitoring has identified some consistent problems in cultural institutions throughout the year. Part of these problems is a consequence of the outdoor environment that exists in Massachusetts, and part of the problem is the inability of institutions to maintain a constant environment that is beneficial to prolonging the life of the materials in their custody.

### Direct Grant Programs

#### ➤ ***Preservation Survey***

The Preservation Survey mini-grant program provides funding for a preservation consultant to conduct an in-depth evaluation of the library building, the collections, and storage and handling practices as carried out in the institution and how these impact the long-term viability and use of the collections and the information that they contained. Furthermore, the consultants' reports consistently make significant recommendations

regarding steps the staff can undertake to enhance the preservation of the collections. Given this information and these recommendations the staff then develop a multi-year Preservation Action Plan to guide their preservation activities in the years to come.

### **Project Outputs**

Outputs in this grant category are tangible. A report is created by the consultant and the library staff is required to create a Preservation Action Plan to provide a road map for future preservation activities in the library. In general, this grant category does not lend itself to measuring outcomes. However, there were some exceptions. As a result of the Preservation Survey grant, staff reported changes in the way they performed certain tasks (e.g. shelving oversized volumes on their spines instead of on their fore edges, moving collections off the floor), using other materials to accomplish the same task (e.g. neutral adhesives in book repair or acid-free boxes and folders to house manuscript materials), requesting more information that would permit them to protect their collections more completely (e.g. participating in the state's environmental monitoring program), and approaching their handling of the materials in their collections differently.

It is difficult to quantify how the information provided from a Preservation Survey may have a direct impact on library service, but there is an attitudinal change on the part of the staff and how they handle, shelve, and store the materials in the library. Even though librarians may not necessarily be in a position to implement some or many of the recommendations from the Preservation Survey immediately, they have now become conscious of these issues and they have become more aware how various practices impact the longevity of the materials.

### ➤ ***Preservation of Library and Archival Materials (PLAM)***

The Preservation of Library and Archival Materials (PLAM) targeted program provides for the preservation of library and archival materials in their original format, reformatting or copying of material at risk, and/or combining these approaches, when necessary and appropriate, with a digitization program to provide access to those materials deemed too fragile to be consulted regularly by researchers. The grant is available only to those institutions that have had a Preservation Survey of their institution. The focus of this grant must therefore be on addressing one or more of the recommendations of the survey report.

### **Project Outputs**

In the PLAM targeted grant program, the outputs were quite measurable as each project either produced reformatted (e.g. microfilm) or conserved items (e.g. scrapbooks, maps, books, documents, photographs, and negatives). In some instances, the grant also produced a digital surrogate of the materials that could then be viewed at a computer or over the Internet in place of the original when necessary. The outcomes of these grants were much more in the ability to gain knowledge from materials that had not been available or had been available only in a restricted form before because of their fragile condition than in tangible changes in people's behavior or skills.

The PLAM grants have enabled institutions to make the originals or copies of the preserved materials available to researchers, whereas many of the objects were too fragile to be consulted before. In some instances, the information contained therein had not been available for many years because of the condition of the materials.

Two excellent examples of these grants were those that were awarded to the Newton Free Library and the Berkshire Athenaeum, Pittsfield. In the first instance, the

library contracted with several conservators to conserve a number of documents and volumes that document Newton's 19<sup>th</sup> century history, society, and government. At the same time, the conserved volumes were microfilmed so that the informational contents would be preserved and the originals would not have to be handled regularly. Access to the information is provided through positive microfilm copies while the master negatives are stored off-site in an environmentally controlled location. At the Berkshire Athenaeum, the staff had determined that the Edward R. Knurow Manuscript and Photo Collection was a high priority for conservation. This collection was essentially unavailable because of its fragile condition. The project involved scanning the manuscripts for access and creating preservation microfilm from the scans. Archival quality negatives were created for the photographs, and they were scanned to provide access. At the end of the project, the manuscripts, photographs, and negatives were re-housed in proper containers; the preservation master negatives of the microfilm were housed offsite in an environmentally controlled location; and access to the collection was provided both through scanned images and positive microfilm copies.

➤ ***Manuscripts' Arrangement and Description***

The Manuscripts' Arrangement and Description (MSAD) targeted grant program provided for staff training as well as professional assistance in the arrangement and description of manuscript collections housed in libraries. All too often library staff do not have the training or the experience to handle manuscript materials and make them available to the public. By providing funds to hire a consultant either to process the collections and provide basic training to the staff or to train the staff to do the processing with them serving as mentors, this grant enabled numerous libraries to learn what exactly they had in their manuscript holdings and to make these materials available to researchers.

**Project Outputs**

In the MSAD targeted grant program, the outputs were clearly the arranged and described manuscript collections. In general, this grant category did not lend itself to measuring outcomes, but the staff in several institutions greatly increased their knowledge base in handling, arranging, and describing manuscript materials. Moreover, a whole new attitude developed as to the presence of manuscripts in their collections which often had been recognized as an important resource without anyone knowing what to do with them. Now they have become a useable resource.

Over the years, numerous manuscript and other collections have made their way into libraries across the Commonwealth, mostly through gifts. Unfortunately, most librarians do not have an archival background and therefore do not know how to arrange and describe these collections. New England has a tradition, especially among historical societies, of taking these collections and cataloging them as individual items, thus destroying any continuity, provenance, or original order of the collections. Fortunately, in many public libraries rather than catalog these materials individually, the staffs have just left the materials undisturbed in their local history rooms. This has meant that a grant program such as this could have an impact on the availability of these manuscript materials according to modern archival standards. In addition, appropriate collection development, security, exhibition, reading room, and preservation policies were created or updated as appropriate. Three grants stand out as excellent examples of what has been accomplished in this arena. At the Ipswich Public Library, the archival consultant processed a collection with one of the staff members. The staff member then arranged

and described five other collections under the guidance of the consultant. The rest of the staff became involved in the exhibits and the cataloging of the collections once they had been processed. At the Sturgis Library, Barnstable, hired an archivist to inventory, arrange and describe its unprocessed collections that document Cape Cod genealogy, history, and heritage. During the project twenty-five collections were arranged and described. In addition the Library director and two other staff members were trained in accessioning and arrangement and description. The rest of the staff was given training in handling archival materials. Finally, as part of an “open” project the Northeast Massachusetts Regional Library System (NMRLS), contracted with several archival consultants to provide archival training to a fairly large number of librarians in the region and to then arrange and describe collections at ten institutions in the region. This project provided for the training of a much larger number of librarians than number of institutions actually participating; thus providing a greater base of archival knowledge throughout the region. In each instance, the staff who went through the training was also involved in the actual arrangement and description of the collections.

**Goal 1, Objective 4: Provide electronic access to historical and other significant research materials through digitization.**

➤ ***Digitizing Historical Resources***

This program provided for the electronic access to historical and other significant research materials through digitization.

The Digitizing Historical Resources grant program provides funding for institutions to contract with a digitizing vendor to scan, provide metadata for, mount, store, and make available on the Web the specified collections targeted in the grant. Only in the case of an institution that already has its own fully-functioning scanning lab can the grant be used for anything other than the contractual obligations with a vendor and the appropriate conservation supplies necessary to house the materials properly.

**Project Outputs**

Outcomes are extremely difficult to determine in this grant category except in so far as the researchers are able to increase their skill and knowledge based on the availability of materials not available before. As to outputs these would include the number of images created, the creation of metadata, and making the images available on the Web.

Any project that makes more information available to the users has a beneficial impact on user service. There have been numerous reports from the grant recipients of testimonials from users of the importance and joy of finding the scanned information on the Web. Often these have come from out-of-state users who would have to have traveled a good distance to have consulted the information/ documents, even if they had known of their existence. In addition, these projects have often brought together resources from a number of institutions’ collections to create a coherent whole. In one instance a significant result was the creation of teacher packets with CD’s including images from the collection.

One example of a cooperative project was the one spearheaded by the State Library of Massachusetts to digitize the papers and drawings of Alexander Parris, architect-engineer, of the first half of the nineteenth century in New England. This project brought together the holdings of the State Library of Massachusetts, the

Massachusetts Historical Society, Historic New England, the Massachusetts General Hospital, the Boston Public Library, the Boston Athenaeum, and the Boston National Historical Park, Charlestown Navy Yard into a coherent whole accessible on the Web to researchers. In another instance that also involved cooperation between institutions, the Boston Athenaeum's Boston African Americana project, in conjunction with the Bostonian Society, the Massachusetts Historical Society, and Historic New England, digitized materials relating to African Americans documenting "slavery, the abolition movement, free blacks, the Civil War, Emancipation, Reconstruction, rural life, urban life, social life, advertising, and depictions of men, women, and children, and consist of broadsides, caricatures, illustrations, manuscripts, pamphlets, political cartoons, portraits, and views. The database contains images and transcriptions of over five hundred items spanning the years 1770 to 1950, with the bulk of the collection falling around 1865." As part of this project, the staff at the Boston Athenaeum created teacher packets of information for the public schools dealing with the collection including CD's with the images on them.

➤ ***Open Project – Digital Commonwealth, Boston Public Library***

Digital Commonwealth began life as an FY2004 LSTA grant entitled MODEL (A Massachusetts Online Digital Electronic Library). Conceived and coordinated by a partnership between the Boston Public Library and the Northeast Massachusetts Regional Library System, the original intent of this grant was to plan for and create some initial proof of concept digital collections to be shared via a single statewide portal. The grant would establish how metadata from the disparate digital collections held by Massachusetts libraries (and later, other types of cultural heritage institutions) would be harvested. It would establish metadata standards for participating libraries to follow. It would identify how digital objects might be stored for libraries that could not provide their own asset management system, and how digital content would be preserved over the long term. The project also intended to review how libraries across the state might avail themselves of scanning labs.

**Project Outputs**

The first two years of the project have made some significant headway in some areas, but has encountered major impediments in others. An initial needs assessment survey with 1115 user responses and six librarian focus groups showed sufficient interest for Massachusetts libraries to move forward with the project. Conferences workshops were held at the Massachusetts Library Association spring meetings in 2004 and 2005, as well as a program at a joint ALA New England ACRL meeting in the fall of 2005. Attendance at the programs has been good, with members discussing planning and governance issues as well as receiving continuing education from guest speakers.

In May of 2006 a formal governance structure was adopted, with an initial fee proposed for voting membership in the project. An executive board has been formed that will take the project into the future, after grant funds have been expended.

Currently, work is underway to develop the front end system that will allow end users to search disparate digital collections. Originally, OAISTER ([www.oaister.org](http://www.oaister.org)) was allowed to harvest a small subset of Dublin core metadata records. More recently, NECOL (New England Collections Online, a service of NELINET) has mounted a prototype searchable database, with 9,645 records from 4 archives.

Without using LSTA funds, the Boston Public Library has purchased a digital asset management system to store its own digital objects, and potentially to offer a hosted solution to libraries that need a home for their digital objects. Unfortunately, Boston has had significant difficulty reaching a point where this service can be offered to Digital Commonwealth Members.

## Progress in Showing Results of Library Initiatives or Services

Massachusetts has provided training in outcome based evaluation to state and regional library staff, and has contracted for three years with Rhea Joyce Rubin, Inc., to provide additional training and consultation in the development of program outcomes. Outcome based evaluation was used in four LSTA programs: *Information Literacy*, *Statewide Database Promotion and Training*, the *On the Same Page* community reading program, and *Reader's Advisory in the Library*. A fifth program, *Serving Tweens and Teens*, which began in October 2006, will also use outcomes measurements developed by Rubin. Rhea also provided direct training to project managers for this program in October 2006.

A training manual in OBE written by Rhea Rubin is posted on the MBLC website at: <http://mblc.state.ma.us/grants/lsta/manage/obe/index.php>.

Success with outcomes measurement is mixed, but improving. The Information Literacy and Database Promotion and Training programs were suited to OBE, but demand for the programs decreased due to requirements of the Children's Internet Protection Act, which made it difficult for public libraries to buy computers with grant funds. We have spoken of difficulties with the On the Same Page program in the Lessons Learned section. However, the Reader's Advisory in the Library program that concluded in September 2006 yielded excellent outcomes (presented in section I). We have also noted an increase in the number of libraries reporting outcomes to isolated programs (usually under the "Open" category) this year and last year. The MBLC, and the regional library systems, seem to have provided enough outcomes based training that we are seeing some examples reported on in non-OBE targeted programs.

## Lessons Learned

We have learned that our program design and procedures allow for flexibility in meeting the changing needs of Massachusetts' rapidly shifting demographic profile and its expanding technology continuum.

We have learned that investment in resource sharing and its resultant expansion, while a wonderful thing, is not enough to meet customer demand without an even greater investment in, and expansion of, delivery services.

We have learned that not all library programs are suitable for outcomes measurement, and that for those that are, training of library staff and persistence in reminding people about indicators and data collection are necessary to obtain them. Still, it is hard to predict when a target group will be the “captive audience” that lends itself to outcome measurement.

In 2005 we attempted to use outcome measures on the On the Same Page mini grant program that involves engaging the community in reading the same book. We worked with Rhea Rubin, a consultant from California who is nationally respected as an authority on library related outcome measures. Rhea helped us design two questionnaires that were to have been used by the library to try to assess the impact of the program. In general, although it seemed like there might be ways to measure this program, in fact it proved to be somewhat difficult for sub grantee library staffs to elicit a response from the participant groups that showed any meaningful changes in behaviors or attitudes based on the program. Some communities made the extra effort to document changes in behaviors, albeit what one would call “intermediate” outcomes.

An example of the survey response from a 2005-2006 program at the Auburn Public Library is included below:

Pre-program surveys furnished by the Massachusetts Board of Library Commissioners were distributed at the beginning of April. All of the surveys were completed by females, approximately one-third of whom were 36-45 and another one-third of who was 56-65. 45% had never attended a program for adults at the library before April. 64% had never read a book by Kate DiCamillo before. 64% had read more than three books for pleasure during the past month. 73% had spent more than three hours during the past week reading for pleasure. In the last month 82% had informally discussed a book they were reading with a friend, neighbor or colleague at least once. In the past month 55% had informally discussed a book they were reading with an acquaintance or stranger at least once.

In August post-program surveys, also furnished by the Massachusetts Board of Library Commissioners, were sent to those who had completed the pre-program surveys. 73% of the post-program surveys were returned. 75% (compared to 64%) had read more than three books for pleasure during the past month. 88% (compared to 73%) had spent more than three hours during the past week reading for pleasure. In the last month 100% (compared to 82%) had informally discussed a book they were reading with a friend, neighbor or colleague at least once.

In the past month 88% (compared to 55%) had informally discussed a book they were reading with an acquaintance or stranger at least once. 75% were likely or very likely to read

another book by Kate DiCamillo. 100% said they were likely or very likely to participate in another program or event at the Library. 88% agreed or strongly agreed that they would not have read Because of Winn-Dixie if it were not for Auburn Reads Together. 88% agreed or strongly agreed that they interacted with people considerably younger or older in a way that they do not usually interact because of Auburn Reads Together. Not surprisingly, 63% disagreed or strongly disagreed that they interacted with people of another race or ethnicity because of Auburn Reads Together. Auburn has a very small (1%) non-white and/or ethnic population. 76% agreed or strongly agreed that Auburn Reads Together gave them a welcome chance to meet or interact with others they didn't already know. 76% agreed or strongly agreed that participating in Auburn Reads Together increased their sense of community involvement or satisfaction. 62.5% agreed or strongly agreed that an acquaintance or stranger struck up a conversation with them about the book during Auburn Reads Together somewhere other than at the Library. Some of the other places mentioned were a church festival, the grocery store and the bank.”

The data revealed in these program surveys actually provides important information about the impact of the community read program. However, it requires in addition to conducting all of the programmatic activities that the library also make a concerted effort to provide the pre and post surveys to participants. Informal conversations with some of the grant recipients indicated that they considered conducting these community surveys onerous. There is no doubt that these programs are viewed as worthwhile but many consider the added paperwork required to do outcome surveys as adding yet another level of bureaucracy.

Therefore, in the future should the MBLC continue to require some kind of outcome measurement of its programs, it would be important that our staff design the outcomes ahead of time and include information about this in the training workshops that we offer in January and the October workshop that all are required to attend.

The two programs that did provide the best examples of outcome measurement this year were the Customer Service and the Readers' Advisory projects. Both of those programs involved staff training and included measuring attitude, knowledge and behavior changes among staff who participated in Customer Service workshops or who were involved in genre training. Both these programs required that the project directors provide some kind of pre and post survey during the training periods. Results from these programs were extremely satisfying. Staff were a consistent and “captive” target group.

This year the MBLC worked with the Libraries for the Future foundation and coordinated funding to 15 libraries, which each received \$5,000 for LSTA projects to be carried out in the current year. The LFF model teaches participants to use outcome based measures in developing their programs and prior to receiving funds, Eleanor Stafford, the LFF coordinator at the MBLC

spent many hours working with these libraries to develop multiple outcomes which they will carry out in the coming year. Thus, a program such as the Equal Access grants affords a real opportunity to begin training library staffs on techniques that will help them develop outcomes. The agency should have a lot of good data on these programs to report in next year's special projects report. We are also requiring that all of the 11 funded Teens and "Tweens grantees, which just began projects this year, develop and measure at least one outcome for their program. Therefore, it seems likely that the agency will continue to support using outcome based measurement, where appropriate, and to incorporate training in developing these outcomes into our future grant programs.

## Brief Description of the Evaluation Process

This evaluation was completed by Massachusetts Board of Library Commissioners staff with the input of the Massachusetts library community and users of library services.

The evaluation followed the strategic planning process the Board carried out in late 2005. During that process participants were asked to comment on how current Board programs had helped their library to be successful, how programs could be improved, and what programs not currently offered would help their libraries succeed.

Fifteen "Key Issues" Forums were conducted. Although the majority of attendees were public library directors, there was representation from academic, school and special libraries as well as Library Trustees and Friends. Comments were also received by email. Additional forums with regional library administrators, network administrators and staff of the Perkins School for the Blind and the Talking Book Libraries to assure that their voices were heard in the process.

Although the discussions were not limited to LSTA issues, numerous comments specific to LSTA were received and have been incorporated in this evaluation.

The following is a complete listing of the Key Issues Forums held. All were in 2005.

March 14	Network Administrators
March 23	Regional Administrators
May 13	Brooks Library, Harwich
May 19	Newton Free Library
May 20	Middleboro Public Library
May 23	Berkshire Athenaeum, Pittsfield
May 26	Nevins Memorial Library, Methuen
June 6	Western Region Headquarters, Whately
June 7	Millbury Public Library

June 15	Boston Public Library
June 23	Abbot Public Library, Marblehead (NOBLE Annual Meeting)
June 30	Massachusetts Board of Library Commissioners
July 26	MBLC Staff
August 10	Worcester Talking Book
August 11	Perkins Braille and Talking Book

LSTA staff met regularly beginning in March 2006 to work on the evaluation and new Long Range Plan. The decision was made not to hire an outside evaluator, since it was felt that the time required to make such a contractor knowledgeable about the program could be better spent in the evaluation process itself. The following calendar was adopted by the Board at their June 2006 meeting, at which they also appointed a five-member subcommittee of the State Advisory Council on Libraries (SACL) to participate in the evaluation and planning processes. Appointed were: Ann McLaughlin (public library representative), Gail Scanlon (academic library), Richard Poisson (special library), Joan Stern (school library) and Irving Zangwill (library user representative).

Although there were no outside evaluator costs, we have estimated that 130 hours of staff time were used for meetings, and drafting and reviewing the evaluation report, at a cost of approximately \$3,900. Volunteer hours for the SACL subcommittee and those attending forums have not been calculated.

## Calendar for Evaluation of 2003-2007 Library Services and Technology Act (LSTA) Long Range Plan And Development of 2008-2011 Plan

1. IMLS Workshop discusses evaluation of old plan, development of new plan (2008-2011)	November 2005
2. Staff discussion of timeline, past LRP process, preliminary brainstorming, makeup/representation of committee, use of focus groups, etc.	April 2006
3. SACL LRP subcommittee appointed by Board (including SACL liaison)	June 2006
4. Staff gather data for evaluation (including data from community forums for Strategic Plan) of current LSTA Long Range Plan (2003-2007)	June-July 2006
5. Online survey of library community for evaluation & new plan	July-August 2006
6. Evaluation of current LSTA Long Range Plan prepared by staff	August 2006
7. Evaluation submitted to IMLS	Early September 2006
8. Evaluation presented to MBLC	November 2006
9. Draft of new (2008-2011) Long Range Plan prepared by staff	September-November 2006
10. New plan available for public comment (web posting)	January/February 2007
11. New plan submitted to Board for approval	March 2007
12. New plan submitted to IMLS	April 2007
13. New plan begins	October 1, 2007

### Staff Tasks Related to the Above Calendar:

Select recommended committee members, determine where needs remain, brainstorm planning proposal	April 2006
Submit sample of goals/objectives evaluation form to IMLS (Shelley)	May 2006
Review community forums conducted for Board's strategic plan for input into evaluation and new LRP	May 2006
Gather info for "in depth" eval section	June 2006
Begin draft of new plan	September 2006
Send draft of new plan to all regions	January 2007
Make plan revisions as suggested	March/April 2007
Disseminate new plan. (Print copies to public libraries and other libraries with LRPs? Letter to others with web address.)	After IMLS approval, but no later than FY2009 LSTA grant round announcement.