Massachusetts **Libraries**
BOARD OF LIBRARY COMMISSIONERS

Library Services & Technology Act
Five Year Plan 2018-2022

PART ONE: MISSION

The Massachusetts Board of Library Commissioners works to provide every person in the Commonwealth with full and equal access to outstanding library services, to promote innovation and collaboration, and to position libraries at the center of civic life in their communities.

Guiding Principles

As the state agency with overall responsibility for libraries, the Massachusetts Board of Library Commissioners (hereinafter "MBLC") implements its programs, services, and initiatives in the context of a set of overarching guiding principles that define the agency's strategic approach. These guiding principles include:

Leadership, Standards, Innovation: The MBLC provides leadership for the library community, sets standards that place Massachusetts libraries and library-related programs squarely within nationally recognized best practices, and fosters innovation and entrepreneurship that maintains and extends Massachusetts's national leadership in library services.

Requirements and Processes: The MBLC develops requirements and processes for libraries to access funding and other types of support that are designed to foster quality and equity. For example, the MBLC requires a level of municipal funding before public libraries are eligible for state aid, thereby ensuring a level of local commitment and support for the library that enables quality, accessible programs.

Continuous Improvement: The MBLC plays a central role in promoting local and statewide library programs and services. The MBLC provides high quality descriptive and instructional materials for services and resources such as databases, eBooks, and summer reading programs. The MBLC coordinates campaigns and other support for library programs throughout the state that promote continuous improvement in and awareness of local library services and provides tools and techniques that enhance libraries' activities at the local level.

Platforms and Infrastructure: The MBLC provides, manages, and supports various online and digital platforms and the related infrastructure for a number of statewide resources and services.

Collaboration and Resource Sharing: Through its direct activities and funded initiatives with affiliates[1], the MBLC prioritizes regional and statewide collaboration and resource sharing as a strategy for maximizing the impact of and access to the available resources.

Public Access: Through its website and other communications activities, the MBLC serves as a comprehensive source of information about local, regional, and statewide library programs and services. The MBLC provides information that library staff, Trustees, and Friends need to access funding and other support.

Sustainable Expansion: Planning for any new programs and initiatives within the library community or developed in collaboration with external partners includes an approach to sustaining those efforts over time or beyond an initial cycle of funding. New staff positions, new programs, and any expansion of the MBLC's activities will be implemented with a specific and strategic plan for sustainability. Projects of fixed duration have implementation plans that include a clear process for conclusion with a specific exit strategy.

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[1] *Please note: Full descriptions of Affiliates and Partners is provided in Part Four: Coordination Efforts*

PART TWO: NEEDS ASSESSMENT

Local support accounts for an average 96% of funding for Massachusetts's 370 public libraries. Massachusetts is the home of the first public library in the U.S. and has a proud, strong, and deeply embedded tradition of municipal independence and local identity. At the same time, through decades of commitment and visionary leadership, Massachusetts has developed a robust, remarkably strong and resilient tradition of library resource sharing and mutual support, and a firm dedication to equal access.

Funding

Massachusetts communities of all sizes are facing a rapidly accelerating local funding crisis due to three decades of constriction under the Proposition 2 ½ tax limitation law that strains their ability to fund local services on an annual basis and imposes a levy limit over time. Six municipalities hit the "levy ceiling" in 2016 and twelve more are approaching that ceiling. (Massachusetts Department of Revenue, Division of Local Services, 10/20/16). Massachusetts municipalities are also grappling with diminishing local aid from the state, and slow or stagnant revenue growth. Many Massachusetts towns are "built out" - and have no opportunities for increasing their tax base through additional development, reflecting the fact that Massachusetts has the third-highest population density in the country. While recent data reflects modest commercial growth in Massachusetts, that data is driven primarily by the amount of redevelopment activity in Boston itself, and in fact, communities in Franklin, Berkshire, and Barnstable counties are trending downward in both population and revenue.

Many Massachusetts libraries are feeling the pinch with staff reductions, decreases in hours open, shortfalls in materials expenditures, and aging equipment and facilities. According to statistics from the Massachusetts Department of Revenue, Schedule A report, submitted by town accountants and city auditors to the Division of Local Services, local support for public libraries fell from 1.25% of total municipal expenditures to 1.19% (FY '09 - FY'13).

Small Library Challenges

More than half of Massachusetts public libraries (191/370) are classified as "small," i.e., in communities below 10,000 population, with 121 below 5,000. These libraries contribute enormous value and identity to their communities while many struggle with severe budget deficits, aging facilities, part-time hours and minimally trained staff. Some are still isolated, not networked, and technologically deficient. The MBLC will continue to seek efficient, effective, and realistic ways to assist these smallest libraries in their commitment to serving their communities. Residents of the smallest communities often rely upon larger libraries that are open more hours, have larger collections, and offer more programs. Some of those neighboring communities are feeling the strain and seeking relief from the MBLC through larger grants and special project requests. The high level of investment Massachusetts has made in its libraries' connected infrastructure requires continuous renewal and fresh thinking to continue to be a national model of success and public pride and satisfaction.

The MBLC requires libraries to submit current Strategic and Action Plans to be eligible for LSTA and other direct grants. Many libraries do not have the capacity to conduct a strategic planning process and preliminary analysis of the plans on file with the MBLC indicates a need for a new planning model. Approximately 50% of public libraries have current plans. Very few school systems and other types of libraries, including correctional institutions and special libraries of all types, have up to date plans on file. Of those that have up to date plans, many have qualified for LSTA grants.

Services to Students

In remarks presented at the Massachusetts Library Association annual conference in May 2017, incoming ALA President James Neal identified pressing challenges libraries are currently facing: since 2008, there are 20,000 fewer librarians and 60,000 fewer library workers nationwide. In Massachusetts, this loss is most keenly felt in our school libraries**.** Clearly children need reliable access to libraries for the full range of student support, homework help, research materials, and reading recommendations and resources.   Massachusetts's public, academic, and special libraries are also experiencing dramatic changes as many have experienced budget reductions, professional positions have been eliminated, and aging service paradigms demand rethinking while librarians are racing furiously to keep up with all the varied demands of a complex society and constantly expanding information streams.

Public Health

Massachusetts state legislators, agencies, and local officials are holding town hall sessions and discussing approaches to address a serious opioid crisis in the state, including recent legislative initiatives. Massachusetts library workers report an increase in drug problems in the library. Librarians are pursuing training in identifying crises and some have, and others are prepared to, administer life-saving interventions like naloxone. Librarians are the trusted source in their communities for sound information and continuously look for new ways to position the library as a key partner in addressing these large social challenges.

Underserved Populations

Immigrant groups make up a significant part of the Massachusetts workforce. One in five workers in the Commonwealth was born in another country, including more than one million immigrants and refugees or 16% of the state's total population. Currently 28% of children in Massachusetts have at least one immigrant parent and 78% of children of immigrants under 18 are born in the U.S.

The largest groups of new immigrants to Massachusetts come from the following countries in descending order: China, India, Brazil, Portugal, Haiti, and the Cape Verde islands followed by the Dominican Republic and El Salvador. Asians are projected to become the largest immigrant group in the U.S. by 2055, surpassing Hispanics according to a PEW Research study. Massachusetts has the tenth largest percentage of Asian Americans in relation to total population, according to 2010 U.S. Census; the third largest population of Haitians in the country, and a large population of Portuguese as well.

Families

Poverty and related obstacles can negatively impact the cognitive, physical, and socioemotional developmental outcomes of young children.[2] Family structure is another important consideration for antipoverty programs: children in single-parent families are at greater risk for poor academic outcomes. Parents without family-sustaining jobs, let alone those who are unemployed altogether, often experience heightened risk; two-generation programs have the potential to address this by increasing workforce readiness and employment rates. A lack of health insurance poses a risk to parents' physical health and well-being, as well as family finances.

A recent national survey of the economic, educational, health and community well-being of children, reveals that despite years of economic recovery, more children in Massachusetts are living in poverty now than during the Recession of 2008. According to the 2015 KIDS COUNT Data Book from the Annie E. Casey Foundation, one in six – or 16 percent – of Massachusetts's children are currently experiencing poverty. Although Massachusetts ranks third overall for child well-being nationwide, this data mirrors national trends, notably in the uneven

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[2] https://www.bostonglobe.com/lifestyle/health-wellness/2014/03/25

recovery for low-income families, the growth in child poverty, and improved health indicators. Childhood poverty is one of the key indicators of later health problems.

While Massachusetts fares well in some health indicators, such as having relatively low rates of teen births, and fewer residents who lack health insurance, many families are living in poverty which is a major contributor to health problems. According to a report from Harvard's Kennedy School of Government, Massachusetts has historically resisted a countywide approach to solving community problems. Increasingly there is growing poverty in the suburbs while many of the services for families are still in cities.

Homelessness

According to numbers from the U.S. Department of Housing and Urban Development's *2015 Annual Homeless Assessment Report* to Congress, there were 21,135 people in Massachusetts counted as experiencing homelessness during the January/February 2015 period. On January 31, 2017, there were 3,568 families with children and pregnant women in Massachusetts' Emergency Assistance (EA) shelter program. 87 of these families with children were being sheltered in motels. This number does not count those families who are doubled up, living in unsafe conditions, or sleeping in their cars.

In August 2016, the Massachusetts Department of Elementary and Secondary Education estimated that 9,493 high school-aged students in public schools are experiencing homelessness on any given day. This number includes an estimated 4,085 unaccompanied high school students who are experiencing homelessness and not in the custody of their parent or legal guardian. The number of individuals experiencing homelessness has more than doubled since 1990. On any given night in Massachusetts, the approximately 3,000 night shelter beds for individuals usually are full or beyond capacity (supplemented by cots and sleeping bags).

People with Disabilities

The 2015 Health Needs Assessment of People with Disabilities in Massachusetts identified top health care barriers for all people with disabilities in its statewide survey. The greatest health needs are in the domains of housing, access to mental and oral health providers, access to providers who accept public health insurance, prescription medications, transportation to medical appointments, and accessible gyms. Also notable were the need for provider sensitivity to disability issues and the need for communication supports during health care visits and challenges navigating the health care system due to lack of accessible equipment, fragmented health care, communication barriers and a lack of culturally competent health care professionals.

In 2014 the Executive Office of Health and Human Services launched MassOptions, a centralized information and referral service linking individuals with disabilities and family members to a broad range of community services and agencies. Partners include state human service agencies, independent living centers and the aging and disability resource consortia. The MA Network of Information Providers, coordinated by New England Index, consists of 130 agencies that disseminate disability information and make referrals to the public.

Digitization

In 2017, OCLC released a report summarizing the results of a needs assessment and gap analysis of digitization activities by public libraries and state library agencies in the U.S.[3] National surveys of public libraries and state library agencies were conducted to gauge the extent to which U.S. public libraries are positioned to support the growth of the national digital platform (NDP), primarily through the digitization of their unique collections.

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[3] Morgan, Kendra and Merrilee Proffitt. 2017. *Advancing the National Digital Platform: The state of digitization in US Public and State Libraries.* Dublin, Ohio: OCLC Research

The report outlines key findings from the surveys and provides observations and recommendations for future exploration in the area of supporting digitization efforts in public libraries:

- Ninety-two percent of public libraries have locally significant, unique physical collections
- More than 37.6% of libraries have engaged in digitization activities in the last three years
- In addition to the common barriers of time and ongoing funding, 61.4% of libraries identified insufficient staff training/expertise as a major barrier to their digitization efforts
- All state library agencies reported that digitizing and providing online access to local and unique digitized material aligns with their mission either explicitly (12.8%), or broadly (87.2%)
- Public libraries identified training in imaging best practices (55.6%), copyright risk assessment (47.5%) and metadata best practices (47.0%) as the most potentially helpful to their efforts.

Preservation

Massachusetts Connecting to Collections Statewide Preservation Survey was conducted in 2011 by Northeast Document Conservation Center with an IMLS grant administered by MBLC. (see footnote 4 next page for description of IMLS) The in-depth needs assessment of Massachusetts collections identified severe deficiencies in preservation and disaster preparedness. The report notes that the MBLC is well-positioned to lead efforts, as it has for twenty years, particularly noting strong established partnerships that create a comprehensive approach to the problem. Survey results identified a growing need for statewide activities, citing the challenges of training in collection management, practical preservation planning, inadequate or nonexistent preservation-related funding, building maintenance and environmental conditions that put collections at great risk.

In 2015, MBLC collaborated with Boston Public Library, Digital Commonwealth, Northeast Document Conservation Center, and others to conduct a Planning for Preservation and Digitization study. The resulting recommendations include:
- Develop and promote a set of standard practices
- Create a central clearinghouse
- Develop a statewide network of hubs
- Offer expert guidance
- Establish an education and training program

This study and strong preservation outreach and education guide MBLC's preservation program and provide further support to collaborations with statewide partners.

Access and Infrastructure

Nearly all Massachusetts public libraries are significantly below the FCC benchmarks[1] for library broadband connectivity. Residents, students, and businesses in unserved and underserved communities continue to look to their public libraries as the one source of reliable Internet access. High-speed bandwidth solutions in urban areas are beyond the budget of many larger libraries while the traffic from multiple patron-owned devices (e.g. cell phones and laptops) overwhelms those libraries' capacity to handle the bandwidth demand. Robust connectivity and infrastructure are at the heart of libraries' ability to provide access to government, economic, job-related, educational, and health online resources to support the diverse needs of the community. The MBLC must continue to promote a strong and healthy network infrastructure statewide for all public libraries throughout the state.

[1] Modernizing the E-rate Program for Schools and Libraries: Report and Order and Further Notice Of Proposed Rulemaking ¶.37 (July 23, 2014)

PART THREE: GOALS & PROJECTS

This five year plan doubles the number of goals the MBLC will pursue compared to the 2012 plan. The six goals emerged from an extensive two-pronged planning process that is fully described in Section Six: Stakeholder Involvement. Expanding the goals aligns the MBLC's LSTA direction precisely with IMLS[4] focal areas and intents. This tightly aligned approach creates a shared, meaningful, common language among states to track projects and measure success. Massachusetts's goals one, two and three are primary – they are integral to the mission and will be pursued at some level regardless of funding shifts. Massachusetts's goals four through six are of secondary priority – they provide frameworks for new projects that can be adapted to meet emerging needs and offer opportunities for innovation, new partnerships, and creative responses to changing times.

GOAL 1: PROMOTING LEARNING

MBLC supports learners of all ages with their individual educational and learning goals. Promoting learning for a lifetime encompasses all levels and all parts of the education system, including adult education, continuing training, and informal learning. Lifelong learning is a shared responsibility, in which people's knowledge, skills and competencies are developed and applied and promoted in all parts of society.

OBJECTIVE 1: IMPROVE USERS' GENERAL KNOWLEDGE AND SKILLS

PROJECT 1: EARLY LEARNING AND YOUTH INFORMATION NEEDS AND SERVICES

Library programs and services encourage early learning initiatives and projects targeting children and teens that promote literacy and underscore the important role of the library as a welcoming place for children and teens.

PROJECT 2: SUMMER READING

The Massachusetts Summer Library Program provides summer reading programs in libraries across the state for children, teens, and adults. Summer reading is important in combatting "summer slide", the tendency for students, especially those from low-income families, to lose some of the achievement gains they made during the previous school year. Data on summer reading shows that kids and teens who read four books over the summer do better on reading comprehension tests in the fall. Expanding the program to include adults results in benefits to youth also since children and teens read more when they see the adults in their life reading

PROJECT 3: DEVELOP AND PROVIDE TRAINING PROGRAMS AND SERVICES THAT SUPPORT LITERACY AND ENCOURAGE READING AMONG UNDERSERVED POPULATIONS AND ALL COMMUNITY MEMBERS

Provide programs that enhance the ability of libraries to engage with their communities and with other agencies and organizations to address literacy and related needs. Literacy programs targeting underserved populations help people achieve personal goals as workers, parents, and community members, and impacts democracy and the growth of our economy.

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[4] IMLS refers to the Institute of Museum and Library Services, the Federal agency for libraries. LSTA refers to the Library Services and Technology Act, the legislation that provides federal funds to state library agencies. Please see Appendix A for IMLS Focal Areas, Intents, Purposes and Priorities and Appendix B for a crosswalk that ties the Massachusetts Goals, Objectives, and Projects to the IMLS Focal Areas, Intents, Purposes and Priorities.

GOAL 2: ENABLING ACCESS

MBLC provides access to information and educational resources directly and through libraries and networks in a variety of formats to everyone in the Commonwealth for their individual pursuit of research, education and innovation.

OBJECTIVE 1: IMPROVE USERS' ABILITY TO DISCOVER INFORMATION RESOURCES

PROJECT 1: STATEWIDE RESOURCES AND PROGRAMMING FOR PATRONS: DATABASES

The MBLC coordinates and provides access to full-text online magazines, newspapers and encyclopedias for all Massachusetts residents. These reliable reference and research materials can be accessed directly from the MBLC's Massachusetts Library public portal (libraries.state.ma.us) and from individual library websites.

PROJECT 2: STATEWIDE RESOURCES AND PROGRAMMING FOR PATRONS: EBOOK COLLECTIONS

The MBLC and the Massachusetts Library System co-sponsor the Commonwealth eBook Collection, a library-driven program working to establish an affordable statewide eBook collection and to give Massachusetts patrons easy access to a shared collection of eBooks. MBLC and Massachusetts Library System provide an accessible and streamlined user experience, an expanded range of choices for libraries in the marketplace, and a large shared eBook collection that breaks down barriers to resource sharing. Usage statistics and librarians reports demonstrate that demand from the public and students of all ages is growing exponentially and current models for providing eBooks are inadequate to keep pace with demand and do not provide equal access for Commonwealth residents.

PROJECT 3: STATEWIDE RESOURCES: TECHNOLOGY & CONNECTIVITY

MBLC supports digital inclusion for everyone in the Commonwealth and seeks to expand and enhance the public online experience and access to resources statewide through projects that extend high-speed broadband, improved and expanded network access, access to E-rate, the Commonwealth Catalog, and communications and technology improvements that benefit the people of the Commonwealth.

OBJECTIVE 2: IMPROVE USERS' ABILITY TO OBTAIN AND/OR USE INFORMATION RESOURCES

PROJECT 1: SERVING PEOPLE WITH DISABILITIES OR SPECIAL NEEDS

Libraries need to provide services for people who face special challenges using libraries. Many residents of Massachusetts cannot fully utilize libraries for a variety of reasons including disabling conditions such as visual, hearing, and mobility impairments or inability to physically come to the library. Library staff need to address individual challenges faced by their populations and update equipment, current level of services and staff training to respond to those needs, introduce new assistive technologies that align with library services, and anticipate emerging trends.

PROJECT 2: IMPROVE PUBLIC ACCESS TO LOCAL HISTORY COLLECTIONS

Provide an archivist to enhance access to local history collections by training library staff in how to inventory special collections. Preserve valuable and unique local history and genealogical collections with on-site training in preservation techniques, policies, and procedures for collection management.

PROJECT 3: DIGITIZE COLLECTIONS FOR ACCESS

Digitizing unique collections provides access to the collections locally and remotely.   The Library for the Commonwealth provides free digitization services to Massachusetts institutions and content is uploaded to the Digital Commonwealth, the state repository and portal.

GOAL 3: STRENGTHENING LIBRARIES

MBLC strengthens libraries by educating and training staff, trustees, and municipal officials and by offering direct grants to libraries to explore diverse models of library service delivery. Well-trained personnel at all levels, supportive administration, and knowledgeable boards are key for libraries to stay relevant to the changing needs of the community.

OBJECTIVE 1: PROVIDE TRAINING AND PROFESSIONAL DEVELOPMENT TO ENHANCE THE SKILLS OF THE LIBRARY WORKFORCE AND LEADERSHIP

PROJECT 1: COMMUNITY-CONNECTED LIBRARIES

Provide training and assistance for staff and Trustees; support libraries in their efforts to develop training and professional development for library staff members.

PROJECT 2: LEADERSHIP DEVELOPMENT

Libraries need local leaders who can define and articulate library value in a highly competitive environment. MBLC supports leadership development through professional development, training, mentoring, and coordination and support for new opportunities.

PROJECT 3: PROVIDE PRESERVATION & DISASTER PREPAREDNESS TRAINING

To ensure that valuable and unique collections in libraries throughout the Commonwealth will be available to patrons into the future, libraries need assistance to preserve their collections and prepare disaster plans. MBLC and partners will provide training and targeted grant opportunities to individual libraries and small groups of libraries who share common local histories, and work with libraries to lead preservation efforts with local historical or cultural institutions.

GOAL 4: BUILDING THE WORKFORCE

MBLC supports libraries in exploring ways to develop and enrich non-traditional skills and aid community members in job searching. The latest data point out that Massachusetts labor markets are highly concentrated in the technology center, and many service level jobs have disappeared. These new types of jobs require 21st Century skills.   Massachusetts libraries are well-positioned to collaborate with state and community partners in delivering new programs and services to enhance the education and training of the workforce.

OBJECTIVE 1: IMPROVE USERS' ABILITY TO USE RESOURCES AND APPLY INFORMATION FOR EMPLOYMENT SUPPORT

PROJECT 1: JOB AND CAREER DEVELOPMENT

As reported by the Pew Research Center, "Many believe libraries should be pathways to economic opportunity, especially when it comes to providing resources for business development, jobs search and enhancing workforce skills...52% of all Americans 16 and older say libraries should 'definitely' create programs for local businesses or entrepreneurs." Libraries have always provided resources for career development and job information. As the methods of finding and applying for a job have significantly gravitated to the use of the Internet for job seekers, the library's provision of free, high-speed Internet services and computers is seen as an increasingly valued service by its users. The MBLC will support libraries in their efforts to create programs and provide services to job seekers.

PROJECT 2: STEM: SCIENCE TECHNOLOGY ENGINEERING MATHEMATICS

The MBLC will help build capacity to plan, design, and implement high quality, cost-effective STEM programming and services through professional development of librarians and evidence-based practice. The National Research Council concludes that learning experiences across informal environments such as libraries positively influence science learning in school, shape attitudes toward science, and expand interest in science-related occupations.

GOAL 5: DEVELOPING SKILLS

MBLC supports libraries in their efforts to improve the literacy and basic life skills of the people in their communities. Libraries are a trusted community resource and are able to coordinate with other organizations to provide programs and services that inform and educate a wide audience on issues related to day to day life.

OBJECTIVE 1: IMPROVE USERS' ABILITY TO UNDERSTAND AND APPLY INFORMATION THAT FURTHERS PERSONAL AND FAMILY COMPETENCIES IN UNIVERSAL AREAS SUCH AS HEALTH, FINANCES, AND OTHER LIFE SKILLS.

PROJECT 1: DEVELOPING PARENTING SKILLS THROUGH FAMILY ENGAGEMENT

This program will strengthen the library as an essential resource for connection in the community, particularly among families, using frameworks developed by the Harvard Family Research Project and tested through the Public Library Association. [5] Libraries are a trusted resource in their community, addressing a broad spectrum of family challenges. Libraries collaborate with local agencies to provide meals for children, sound advice on childhood developmental needs, and offer learning and leisure activities that enrich family life. Libraries and parents work together to offer locally relevant programming that is customized library by library, community by community. Through after school and summer enrichment activities and classes, [6] developed in collaboration with families, libraries help parents be active partners in their children's learning from birth through teen years.

PROJECT 2: FINANCIAL LITERACY

According to the President's Advisory Council on Financial Capability, the financial crisis of 2008 demonstrated a widespread and costly lack of understanding of basic financial management information and skills in the United States. They pointed to the need for financial literacy education to begin as early as high school, and to be the responsibility of families, schools, and the local community. Libraries can play a key role in providing programs and resources that help people improve their understanding of financial matters and help parents and teachers model and teach good personal finances.

PROJECT 3: HEALTH LITERACY

The Centers for Disease Control and Prevention states that "Nine out of ten adults struggle to understand and use health information when it is unfamiliar, complex or jargon-filled," and that "limited health literacy costs the healthcare system money and results in higher than necessary morbidity and mortality." The Centers for Disease Control and Prevention also notes that health literacy is critical not only for people who need health information and services, but also for people and organizations that provide health information and services to others. In addition to libraries providing resources and programs to help their community members build health literacy skills, it is imperative that libraries provide their own staffs with at least minimal health literacy training (i.e. build organizational health literacy) in order to better help patrons navigate complex and confusing health information.

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[5] M. Elena Lopez, Margaret Caspe, and Lorette McWilliams. *Public Libraries: A Vital Space for Family Engagement.* (Cambridge, MA: Harvard Family Research Project, 2016).

[6] According to the IMLS report "Growing Young Minds," only 1000 of children's 6000 waking hours are spent in school each year.

GOAL 6: CONNECTING COMMUNITIES

MBLC promotes libraries as centers of the community and supports innovations that nurture civic engagement, promote a strong democracy, and celebrate the community and its citizens. Libraries provide common and inclusive spaces for everyone in the Commonwealth to share ideas and histories.

OBJECTIVE 1: IMPROVE USERS' ABILITY TO PARTICIPATE IN THEIR COMMUNITY AND IN LOCAL ISSUES.

PROJECT 1: CELEBRATE HISTORY AND CREATE NEW COMMUNITY CONNECTIONS

Develop a grant program that preserves and celebrates the history of Massachusetts and its residents, and builds new local relationships. Local projects will result in the creation of new documents and records, some of which will be "born digital," (e.g., oral and video histories) associated with local and state history. Special local events and projects will bring partners and people together and create rich opportunities for cross-generational learning and celebration, expanding local knowledge and awareness of library resources, and placing the library at the center of these events.

PROJECT 2: CIVIC HUB

Members of the community at large participate in activities guided by library staff that promote civic engagement around issues of concern at both local, state and national levels. The library serves as a neutral forum that allows civil discussion and works with local and civic organizations to provide support through resources, training and programming.

PROJECT 3: CONNECTING COMMUNITIES THROUGH READING

A "One Book One Community" planning guide from the American Library Association noted the program goals of several community reading program initiatives. Common themes among these goals are to promote reading and literacy, foster a sense of community, and engage the community in dialogue with an aim to promote tolerance and understanding. Community-wide reading programs- whether targeting a school community, a specific sub-set of a community (for example, local commuters), an entire municipality, or multiple communities- can address a topical issue relevant to the community, increase awareness and acceptance of cultural diversity within a community, or simply convene members of a community in a new and inclusive way. Libraries are well-positioned to establish and lead community-based reading programs.

PART FOUR: COORDINATION EFFORTS

A crosswalk of Massachusetts's Goals and Projects mapped to IMLS/LSTA Focal Areas can be found in Appendix B.

The MBLC supports and oversees a diverse and multi-faceted configuration of organizations and initiatives that provide significant and valued support to all types of libraries throughout Massachusetts. Much of the funding for these organizations and the services they provide is designated in the MBLC's state legislative appropriation. For the purposes of clarity throughout this Plan, these entities are described as affiliates. They are not individually identified in Projects (Goals above) - the sharing of resources and working relationships are inextricably intertwined and tightly woven into the fabric of all MBLC programs.

AFFILIATES

Massachusetts Library System: The MBLC funds the Massachusetts library System whose mission is as follows: The Massachusetts Library System, a state-supported collaborative, fosters cooperation, communication, innovation, and sharing among member libraries of all types. The MLS promotes equitable access to excellent library services and resources for all who live, work, or study in Massachusetts. MLS provides a wide range of continuing education and consulting to all types of libraries, manages delivery as a core element of statewide resource sharing, and collaborates with the MBLC and others on a range of program initiatives including statewide databases, eBook collections, and the Summer Reading Program.

Library for the Commonwealth: The MBLC funds the Boston Public Library to serve as the Library for the Commonwealth. As the Library for the Commonwealth, the Boston Public Library develops and maintains a statewide digital library that provides access to online media, research materials, multimodal reference services and information delivery, access to historical records and collections, and other resources responding to the informational, cultural, and educational needs of the Commonwealth. Library for the Commonwealth's free digitization activities are implemented in partnership with the Digital Commonwealth, an organization of libraries, museums and other cultural institutions, which is responsible for most of the training related to these statewide services.

Talking Book and Machine Lending Libraries: The MBLC funds the Braille and Talking Book Library at the Perkins School for the Blind in Watertown and the Talking Book Library at the Worcester Public Library to provide statewide access to library services and materials for people who are blind, visually impaired, physically disabled, and learning disabled. These libraries provide a range of services, including Braille and large print books, audio described DVDs, streaming books and audio newspapers, accessible reference services, audio equipment loan, and on-site assistive technology. The two libraries also provide training and technical assistance to organizations serving these populations.

Automated Library Networks: The MBLC provides funding and coordination support for nine automated library networks that provide electronic management system for all core library operations, including: the library catalog, the ability to borrow from neighboring libraries, circulation, patron registration and authentication, broadband Internet access, and other mission-critical services. These networks are membership organizations, and receive the majority of their funding in the form of dues from their member libraries.

Massachusetts Center for the Book: The MBLC funds the Massachusetts Center for the Book which is chartered as the Commonwealth Affiliate of the Center for the Book in the Library of Congress. The Massachusetts Center for the Book is a public-private partnership charged with developing, supporting, and promoting cultural programming that will advance the cause of books and reading and enhance the outreach potential of Massachusetts libraries. The Center for the Book conducts programs including the Massachusetts Book Awards, Letters About Literature, a variety of literacy programs, and Route 1 Reads.

PARTNERSHIPS

The MBLC Strategic Plan 2018-2020 explores partnerships in great detail. The Plan describes current partners, establishes criteria for partnerships, identifies potential areas for growth, and sets priorities for action. Portions of that section of the MBLC Strategic Plan follow:

> *The MBLC will seek to develop partnerships with other state agencies, statewide organizations or associations, and other institutions as vehicles through which to design, fund, and implement initiatives that can provide and/or expand important services to residents, businesses, community-based organizations, and other community institutions. ….*
> *Reaching out to state-level partners to explore, develop, and implement new collaborative projects will be opportunistic. The MBLC must be poised to develop such projects when circumstances permit, in part by clearly articulating the ways in which the library community (at the local, regional, and/or statewide level) brings resources and adds value to the collaborative project.*
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> *MBLC has a limited capacity to initiate and manage all such promising collaborative projects. Based on some initial outreach, the MBLC staff will develop priority areas in which to seek these types of partners and projects actively. The MBLC will use the three-year period of the strategic plan to explore these types of relationships, rigorously document the benefits, barriers, and cost-effectiveness of these efforts, and then modify and scale this track of activity. The MBLC will document these efforts by creating reports that describe the process, results, and lessons of the in-depth and sustained planning discussions with each partner (or set of partners) that become engaged at a significant level.*
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> *(**Note**: In addition to the state-level partnerships and collaborations, the MBLC also has and will continue to develop collaborations, resource sharing arrangements, and other innovative program development opportunities with other state libraries or library-related state agencies in other parts of the country.)*

PART FIVE: EVALUATION PLAN

The MBLC tracks its activities using metrics that align with the IMLS's focal areas and intents. Many of these metrics are already in place. Additional approaches to develop measurable results are vigorously pursued in program planning and review. For example, staff revised a pre- and post-evaluation survey instrument used at Fall and Spring Trustee Orientation programs several times in the past six months so that each future Orientation could be refined and improved for the Trustees attending. Staff collect the evaluations at the end of the orientations and have clear evidence of the amount and quality of learning, and areas for modification, improvement, and development. Other programs are measured with similar rigor as appropriate. Staff specialists are refining metrics in areas that were identified as needing more attention in this aspect in the most recent LSTA Five Year Evaluation. MBLC staff members review statistical data on statewide programs like databases, eBooks, Commonwealth Catalog, and the use of the public portal frequently, consult with network and affiliate directors, serve on statewide committees, and make program adjustments as needed. Circulation, usage trends and patterns, and monthly reports presented to the Commissioners from its affiliates are all factors in evaluating LSTA program activities.

Direct grants are rigorously documented and monitored by the MBLC. The MBLC requires sub-grantees to submit current Plans of Service and requires projects to be clearly defined within the scope of the institutions and identified with the Goals and Projects in the LSTA Five Year Plan.   In addition, sub-grantees receive training and guidance to develop and implement the measurable outcomes that their grant proposals must include. Grant proposals are reviewed by the State Advisory Council on Libraries and measurement outcomes are an important factor in the scoring of applications. Sub-grantees are required to submit semi-annual reports on progress and these reports are reviewed by individual LSTA staff members who have been assigned oversight of specific grants based on areas of subject expertise. LSTA staff members check in regularly with the sub-grantees and conduct site visits. All of these projects are compiled into annual reports that precisely document progress on goals, help the MBLC understand what areas need additional resources or development, and lay the groundwork for activities and direction in subsequent years. The MBLC publicizes each new round of grant cycles and staff members engage in outreach activities to showcase successful projects and present new opportunities.   The MBLC encourages grant recipients to share best practices learned in grant projects through communities of practice, by mentoring new grant recipients or applicants, and by fostering connections among grantees to present jointly at state and regional conferences.

The MBLC uses the outcomes-based assessment questions in the State Program Report annually, makes program revisions through its annual direct grant cycle to assure steady progress on achieving goals, and conducts a five-year evaluation of the Program.

PART SIX: STAKEHOLDER INVOLVEMENT

The MBLC LSTA Five-Year Plan 2018-2022 is based on extensive input from the general library community and stakeholders, and surveys and data analysis conducted by two independent entities.

LSTA Evaluation In July 2017, the Council of State Library Agencies in the Northeast, of which MBLC is a member, contracted with Quality Metrics (William Wilson/Martha Kyrillidou) to evaluate the five-year LSTA program ending in 2017. In addition to extensive data analysis based on annual State Program Reports to the IMLS, 199 Massachusetts libraries completed a comprehensive survey conducted by Quality Metrics. William Wilson and Martha Kyrillidou held in-depth individual interviews with MBLC staff and Commissioners, stakeholders, partners, and library directors and staff members in September 2016 and conducted two focus group sessions in Springfield, Massachusetts, in late October 2016. Quality Metrics submitted its LSTA Grants to States Implementation Evaluation in March 2017. Recommendations and direction from the Evaluation inform major elements of this new LSTA Plan and have guided activities relating to the new five-year contract for statewide databases, Commonwealth eBook Collections Steering Committee focus, and revisions to the newest Direct Grant application and reporting requirements.

State Advisory Council on Libraries The Board of Library Commissioners appoints 16 representatives from all types of libraries and regions within the Commonwealth to three-year terms on the State Advisory Council on Libraries. The Council meets twice a year at MBLC offices in Boston and twice by teleconference to consider grant programs and provide general counsel and input into programs and priorities. The Council reviews and ranks direct grant applications and recommends projects with favorable ratings to the Commissioners to be awarded grants. In addition to the usual round of annual meetings and work, members of SACL were invited to participate in focus groups during this busy year of MBLC and LSTA planning activity.

MBLC Strategic Plan FY2018-FY2020 For several years, the MBLC has recognized a need for an overall strategic planning process since the last MBLC Plan in 2005. Much has changed in the national, state, and local landscape, including a consolidation of six former regional library systems into one statewide system, and a significant constriction of funding for libraries. In October 2016, Alan Brickman, of Brickman Nonprofit Solutions, was retained to facilitate a new strategic planning process for the MBLC. During the winter of 2016-2017, Mr. Brickman met with the Planning Committee and set up and conducted interviews with stakeholders. He gathered, reviewed, and disseminated documents, reports and studies; interviewed other New England state library directors and the Executive Director of COSLA (Chief Officers of State Library Agencies); and conducted an online survey of the Massachusetts library community that garnered 337 responses. In January, March, and May, 2017, Mr. Brickman conducted extensive staff visioning and planning sessions and three day-long retreats with a diverse group of stakeholders, Commissioners, and MBLC managers, all of whom reviewed extensive documentation prior to the gatherings. The new MBLC Strategic Plan is in the final stages of revision and will be presented to the Commissioners for approval in August 2017.

PART SEVEN: COMMUNICATION AND PUBLIC AVAILABILITY

Once the 2018-2022 LSTA Plan has been approved by the IMLS, it will be published in print, distributed through libraries, and posted on the MBLC website. MBLC will publish a brief guide to the Plan, and promote interest through meetings, special presentations, and direct individual distribution as appropriate. Any substantive revisions to the Plan, especially to the needs and goals, will be submitted to IMLS according to the provisions of the LSTA and to appropriate stakeholders and affiliates. The MBLC will publicize achievements of important milestones and results of the Plan as required for reporting purposes, and to meet state needs. The MBLC will highlight exemplary programs for future projects.

PART EIGHT: MONITORING

The MBLC will assign appropriate staff to track implementation of the Plan continuously and to prepare appropriate reports as required. An important component of tracking is monitoring sub-grantee projects funded through the LSTA program. Sub-grantees submit semi-annual status reports and final reports on the progress of each project in relation to The Plan, and MBLC staff conduct annual on-site monitoring visits for each project and regular check-ins by phone or email. For all projects, the Plan will be monitored on a regular basis as ongoing activities are documented and measured, particularly when the State Program Report is completed annually. Monitoring will comply with the requirements of the Procedures outlined in 2 CFR 200.327-332

- 2 CFR 200.327 – Financial Reporting
- 2 CFR 200.328 – Monitoring and Reporting Program Performance
- 2 CFR 200.329 – Reporting on Real Property
- 2 CFR 200.330 – Subrecipient and Contractor Determination
- 2 CFR 200.331 – Requirements for Pass-Through Entities
- 2 CFR 200.332 – Fixed Amount Subawards

PART NINE: ASSURANCES

The following assurances are being submitted with this Five Year Plan:

- Program Assurances for 2018 Grant Award (will be submitted when made available by IMLS)

- Assurances of Non-Construction Programs

- State Legal Officer's Certification of Authorized Certifying Official

- Internet Safety Certification for Applicant Public Libraries, Public Elementary and Secondary School Libraries, and Consortia with Public and or School Public School Libraries

FOCAL AREAS AND INTENTS

Focal Area 1: Lifelong Learning
Intents
1. Improve users' formal education
2. Improve users' general knowledge and skills

Focal Area 2: Information Access
Intents
1. Improve users' ability to discover information resources
2. Improve users' ability to obtain and/or use information resources

Focal Area 3: Institutional Capacity
Intents
1. Improve the library workforce
2. Improve the library's physical and technological infrastructure
3. Improve library operations

Focal Area 4: Economic and Employment Development
Intents
1. Improve users' ability to use resources and apply information for employment support
2. Improve users' ability to use and apply business resources

Focal Area 5: Human Services
Intents
1. Improve users' ability to apply information that further their personal, family, or household finances
2. Improve users' ability to apply information that furthers their personal or family health & wellness
3. Improve users' ability to apply information that furthers their parenting and family skills

Focal Area 6: Civic Engagement
Intents
1. Improve users' ability to participate in their community
2. Improve users' ability to participate in community conversations around topics of concern

OVERALL PURPOSES OF LSTA (20 U.S.C. § 9121)

Purpose 1
Enhance coordination among federal programs that relate to library and information services

Purpose 2
Promote continuous improvement in library services in all types of libraries in order to better serve the people of the United States

Purpose 3
Facilitate access to resources in all types of libraries for the purpose of cultivating an educated and informed citizenry

Purpose 4
Encourage resource sharing among all types of libraries for the purpose of achieving economical and efficient delivery of library services to the public

Purpose 5
Promote literacy, education, and lifelong learning and to enhance and expand the services and resources provided by libraries, including those services and resources relating to workforce development, 21st century skills, and digital literacy skills

Purpose 6
Enhance the skills of the current library workforce and to recruit future professionals to the field of library and information services

Purpose 7
Ensure the preservation of knowledge and library collections in all formats and to enable libraries to serve their communities during disasters

Purpose 8
Enhance the role of libraries within the information infrastructure of the United States in order to support research, education, and innovation

Purpose 9
Promote library services that provide users with access to information through national, state, local, regional, and international collaborations and networks

LSTA-SPECIFIED GRANTS TO STATES PRIORITIES (20 U.S.C. § 9141)

Priority 1
Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills

Priority 2
Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services

Priority 3
Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services

Priority 4
Enhance efforts to recruit future professionals to the field of library and information services

Priority 5
Develop public and private partnerships with other agencies and community-based organizations; target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills

Priority 6
Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved

Priority 7
Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks

Priority 8
Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan

CROSSWALK OF MASSACHUSETTS GOALS AND PROJECTS MAPPED TO IMLS/LSTA FOCAL AREAS, INTENTS, PURPOSES & PRIORITIES

GOAL 1: PROMOTE LEARNING
MBLC supports learners of all ages with their individual educational and learning goals.

IMLS FOCAL AREA: Lifelong Learning

INTENTS	PROJECTS	LSTA PURPOSES & PRIORITIES
Improve users' general knowledge and skills	**PROJECT 1:** Early learning and Youth Information Needs and Services	**PURPOSE 5**: promote literacy, education, and lifelong learning and to enhance and expand the services and resources provided by libraries, including those services and resources relating to workforce development, 21st century skills, and digital literacy skills **PRIORITY 7:** target library services to individuals of diverse geographic, cultural and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills
	PROJECT 2: Summer Reading	
	PROJECT 3: Develop and provide training programs and services that support literacy and encourage reading among underserved populations and all community members	

GOAL 2: ENABLING ACCESS
MBLC supports and assists all types of libraries and networks in their efforts to provide access to information and educational resources in a variety of formats.

IMLS FOCAL AREA: Information Access

INTENTS	PROJECTS	LSTA PURPOSES & PRIORITIES
Improve users' ability to discover information resources	**PROJECT 1:** Statewide Resources and Programming for Patrons: Databases	**PURPOSE 3**: facilitate access to resources in all types of libraries for the purpose of cultivating an educated and informed citizenry **PURPOSE 4**: encourage resource sharing among all types of libraries for the purpose of achieving economical and efficient delivery of library services to the public **PURPOSE 9**: promote library services that provide users with access to information through national, state, local, regional, and international collaborations and networks **PRIORITY 1**: expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills
	PROJECT 2: Statewide Resources and Programming for Patrons: eBook Collections	
	PROJECT 3: Statewide Resources: Technology &Connectivity	

Improve users' ability to obtain and/or use information resources	**PROJECT 4:** Serving People with Disabilities or Special Needs	**PURPOSE 5:** promote literacy, education, and lifelong learning and to enhance and expand the services and resources provided by libraries, including those services and resources relating to workforce development, 21st century skills, and digital literacy skills **PURPOSE 9:** promote library services that provide users with access to information through national, state, local, regional, and international collaborations and networks **PRIORITY 2:** establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services **PRIORITY 6**: target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills **PRIORITY 7**: Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children from families with incomes below the poverty line
	PROJECT 5: Improve public access to local history collections	**PURPOSE 6:** enhance the skills of the current library workforce and to recruit future professionals to the field of library and information services
	PROJECT 6: Digitize Collections for Access	

GOAL 3: STRENGTHENING LIBRARIES MBLC strengthens community libraries by providing education and training for staff, trustees, and municipal officials as appropriate; and offering direct grants to all types of libraries to explore diverse models of library service delivery.		
IMLS FOCAL AREA: Institutional Capacity		
INTENTS	**PROJECTS**	**LSTA PURPOSES & PRIORITIES**
Improve the library workforce	**PROJECT 1:** Community-Connected Libraries	**PURPOSE 2:** promote continuous improvement in library services in all types of libraries in order to better serve the people of the United States **PURPOSE 6:** enhance the skills of the current library workforce and to recruit future professionals to the field of library and information services
	PROJECT 2: Leadership development	**PRIORITY 3:** provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services

Improve library operations	**PROJECT 3:** Provide preservation, disaster preparedness training, and other programs that will ensure the long-term viability and access to Massachusetts cultural heritage collections	**PURPOSE 2:** promote continuous improvement in library services in all types of libraries in order to better serve the people of the United States **PURPOSE 7:** ensure the preservation of knowledge and library collections in all formats and to enable libraries to serve their communities during disasters

GOAL 4: BUILDING THE WORKFORCE
MBLC supports libraries in seeking to develop and enrich non-traditional skills and aid community members in job searching.
IMLS FOCAL AREA: Economic and Employment Development

INTENTS	PROJECTS	LSTA PURPOSES & PRIORITIES
Improve users' ability to use resources and apply information for employment support	**PROJECT 1:** Job and Career Development **PROJECT 2:** STEM: Science Technology Engineering Mathematics	**PURPOSE 5:** promote literacy, education, and lifelong learning and to enhance and expand the services and resources provided by libraries, including those services and resources relating to workforce development, 21st century skills, and digital literacy skills **PRIORITY 1**: expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills

GOAL 5: DEVELOPING SKILLS
MBLC supports the efforts of libraries to help improve the literacy and basic life skills of the people in their communities.
IMLS FOCAL AREAS: Human Services

INTENTS	PROJECTS	LSTA PURPOSES & PRIORITIES
Improve users' ability to apply information that furthers their parenting and family skills	**PROJECT 1:** Family Engagement	**PURPOSE 5:** promote literacy, education, and lifelong learning and to enhance and expand the services and resources provided by libraries, including those services and resources relating to workforce development, 21st century skills, and digital literacy skills
Improve users' ability to apply information that furthers their personal, family, or household finances	**PROJECT 2:** Financial Literacy	**PRIORITY 1**: expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills
Improve users' ability to apply information that furthers their personal or family health and wellness	**PROJECT 3:** Health Literacy	**PRIORITY 6**: target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or

		information skills
		PRIORITY 7: Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children from families with incomes below the poverty line

GOAL 6: CONNECTING COMMUNITIES
MBLC promotes libraries as centers of the community and supports innovations that nurture civic engagement, promote a strong democracy, and celebrate the community and its citizens.

IMLS FOCAL AREAS: Civic Engagement

INTENTS	PROJECTS	LSTA PURPOSES & PRIORITIES
Improve users' ability to participate in their community	**PROJECT 1:** Celebrate history and create new content	**PURPOSE 3:** facilitate access to resources in all types of libraries for the purpose of cultivating an educated and informed citizenry **PURPOSE 5:** promote literacy, education, and lifelong learning and to enhance and expand the services and resources provided by libraries, including those services and resources relating to workforce development, 21st century skills, and digital literacy skills
Improve users' ability to participate in community conversations around topics of concern	**PROJECT 2:** Civic Hub	**PURPOSE 5:** promote literacy, education, and lifelong learning and to enhance and expand the services and resources provided by libraries, including those services and resources relating to workforce development, 21st century skills, and digital literacy skills
	PROJECT 3: Community-Wide Reading Programs	**PRIORITY 5:** develop public and private partnerships with other agencies and community-based organizations