

# Massachusetts Board of Library Commissioners

## Library Services and Technology Act (LSTA) Grants to States Program Implementation Evaluation FFY 2018 - FFY 2022

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# EVALUATION SUMMARY

The Massachusetts library landscape is both rich and diverse. The 2019 Public Libraries Survey (PLS) reported that Massachusetts had a total of 369 public library jurisdictions employing 1,952.94 full-time equivalent (FTE) staff categorized as librarians (1,309.38 FTE are reported as having an American Library Association [ALA] accredited Master's degrees). Similarly, the Academic Libraries Survey (ALS) reported that 101 institutions of higher education employ 1,452.34 FTE librarians. According to the National Center for Educational Statistics' (NCES) Elementary/Secondary Information System (EISi), Massachusetts's 429 public school districts employ 616.11 full-time librarians.

In 2019, the total FTE public library staff totaled approximately 3,844 spread throughout 466 public library outlets (both main libraries and branches). The majority of public libraries (58%) in Massachusetts are in what the U.S. Census Bureau considers to be "suburban" environments. However, many of these suburbs are older communities that ring the Boston area and have more the characteristics of small cities rather than the picture that commonly comes to mind when the word suburb is used. More than one-hundred public library jurisdictions (28.18%) serve communities that the Census Bureau regards as either "Rural, Distant" or "Rural, Fringe."

The variety among the libraries of all types in the Bay State is tremendous, ranging from world renown libraries including the Massachusetts Institute of Technology's Hayden and Barker libraries, Harvard's Widener Library and the Boston Public Library's iconic Central Library in Copley Square to tiny reading room type facilities nestled in the Berkshires and 19th century landmarks in legendary towns. The communities served by these libraries range from historical old industrial mill towns to sea-side resorts and from ethnically and racially diverse urban neighborhoods to sprawling suburbs. The challenges involved in meeting the library and information needs of such divergent populations is obvious.

The Massachusetts Board of Library Commissioners' (MBLC) ***Library Services and Technology Act Five Year Plan 2018 - 2022*** captures the challenge well. The Plan states that:

*More than half of Massachusetts' 370 public libraries (191) serve communities of fewer than 10,000 people, and one third serve communities with fewer than 5,000 inhabitants. 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.*

Given Massachusetts' population of 7,029,917<sup>1</sup>, the state's annual Library Services and Technology Act (LSTA) Grants to States<sup>2</sup> program allotment from the Institute of Museum and

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<sup>1</sup> United States Census Bureau, Decennial Census (April 1, 2020)

<sup>2</sup> The report will refer to the Library Services and Technology Act Grants to States program as LSTA.

Library Services (IMLS) of approximately \$3.37<sup>3</sup> million per year translates into \$0.48<sup>4</sup> per person on an annual basis. LSTA funds alone are inadequate to meet the library and information needs of Massachusetts' approximately seven million residents. The Massachusetts Board of Library Commissioners challenge is to find ways to make \$0.48 per person transformative in terms of library services; to invest a relatively small amount of money to accomplish major results by strategically deploying funds and leveraging other public and private monies in support of high-quality library and information services. The existing five-year Plan provides a glimpse at MBLC's strategy in regard to LSTA funds.

"LSTA provides...support that allows us to initiate and build new resources and programming. Once we have developed the service and promotion, we can sustain it over as many years as there is a community need."

There are six goal statements in Massachusetts' ***Library Services and Technology Act Five Year Plan 2018-2022***. They are:

- GOAL 1: PROMOTING LEARNING
- GOAL 2: ENABLING ACCESS
- GOAL 3: STRENGTHENING LIBRARIES
- GOAL 4: BUILDING THE WORKFORCE
- GOAL 5: DEVELOPING SKILLS
- GOAL 6: CONNECTING COMMUNITIES

In a document entitled ***State Program Reporting Requirements***, IMLS provides helpful guidance to state library administrative agencies (SLAAs) to assist them in their planning and reporting activities. A key element of this document is the presentation of "Focal Areas" and "Intents." These are described as follows:

"Focal Areas and Intents are broad conceptual categories used to show how projects are aligned with priorities and purposes of the IMLS Grants to States (and LSTA) program. Focal Areas and Intents use controlled vocabulary to allow for meaningful reporting, evaluation, comparison, and assessment of States' initiatives. The six Focal Areas below were identified by State Library Administrative Agencies (SLAAs), and they represent the foundation by which the reporting structure is organized. In the State Program Report (SPR) system, they are further specified by and inferred from Intents, which are the intended outcomes of an action or set of SLAA activities. Intent reporting helps define the "why" of the Grants to States program."

The six focal areas are:

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<sup>3</sup> Four year LSTA Grants to States allotment average ((FFY [Federal Fiscal Year] 2018 State Allotment + FFY 2019 State Allotment + FFY 2020 State Allotment + FFY 2021 State Allotment) / 4)

<sup>4</sup> Four year LSTA Grants to States allotment average / United States Census Bureau Decennial Census (April 1, 2020)

- Institutional Capacity;
- Information Access;
- Lifelong Learning;
- Human Services;
- Employment and Economic Development; and,
- Civic Engagement

While the focal areas are permissive rather than prescriptive, that is, there is no obligation for states to fund projects and activities in all six areas, Massachusetts has taken the somewhat unique approach in their 2018 - 2022 five-year plan of developing six goals that correspond to the six focal areas. Goal 1 aligns with the Lifelong Learning focal area; Goal 2 with the Information Access focal area; Goal 3 with the Institutional Capacity focal area; Goal 4 with the Employment and Economic Development focal area; Goal 5 with the Human Services focal area; and, Goal 6 with the Civic Engagement focal area.

### Agency’s Internal Assessment and Evaluator’s Assessment

As part of the assessment process, the evaluators asked the Massachusetts Board of Library Commissioners’ Director, the Massachusetts Board of Library Commissioners’ LSTA Coordinator, and other key staff identified by the Director to offer their joint appraisal of progress their agency had made toward achieving each of the six goals included in the 2018-2022 five-year plan. The evaluators prefaced their request for this internal assessment by noting the fact that the state was only three years into the implementation of the five-year plan. Consequently, it was acknowledged that it was unlikely that any of the goals would be completely or fully achieved.

Table 1 offers a summary of both the Massachusetts Board of Library Commissioners’ internal assessment and the evaluators’ conclusions.

<b>Table 1 - Massachusetts Board of Library Commissioners’ and Evaluator’s Assessment of Achievement</b>		
<b>GOAL</b>	<b>Massachusetts Board of Library Commissioners’ Internal Assessment</b>	<b>Evaluators’ Assessment</b>
GOAL 1: PROMOTING LEARNING	Achieved	Achieved
GOAL 2: ENABLING ACCESS	Partly Achieved	Achieved
GOAL 3: STRENGTHENING LIBRARIES	Partly Achieved	Achieved
GOAL 4: BUILDING THE WORKFORCE	Partly Achieved	Partly Achieved
GOAL 5: DEVELOPING SKILLS	Partly Achieved	Partly Achieved
GOAL 6: CONNECTING COMMUNITIES	Partly Achieved	Achieved

**Goal 1** - Not only has MBLC accomplished each of the Goal 1 Objectives from their Plan, it has leveraged a relatively small quantity of funds to make a substantial impact on the lives of

citizens around the state via dozens of direct and targeted grants to libraries, as well as the statewide Summer Reading program. The evaluators conclude that Massachusetts Board of Library Commissioners has **ACHIEVED** Goal 1.

**Goal 2** - MBLC successfully achieved the two Objectives and six Projects that were planned in the LSTA Five Year Plan for Goal 2 through a well-balanced mix of statewide programs and grants to libraries. The evaluators conclude that MBLC has **ACHIEVED** Goal 2.

**Goal 3** - The evaluators believe that MBLC accomplished its single Goal 3 Objective. The *Public Library Advisory* project is a longstanding and vital LSTA-funded program that pays for a number of MBLC staff salaries. These staff in turn provide assistance and outreach services to public library directors and staff, trustees, library friends groups, and municipal officials on a wide range of library related topics, including laws and legislation, regulations, policies formation, library governance issues, strategic planning, and the roles and responsibilities of trustee and friends' groups. The *Data Coordination* project enables the collection, analysis, and dissemination of public library input and output data that provides both MBLC and local libraries with valuable information that helps to inform State and local decision-making. Two web initiatives, *Newsroom/MBLC Awarehouse* and *Web Site Support* help the state library agency communicate with both the larger library community and with the public and alert local libraries of service trends and opportunities that help libraries extend their reach into the communities they serve. While several other smaller projects have been carried out in pursuit of Goal 1, on the basis of the aforementioned projects alone, the evaluators conclude that Massachusetts Board of Library Commissioners has **ACHIEVED** Goal 3.

**Goal 4** - In the three year period (FFY 2018, FFY 2019, and FFY 2020) studied in conducting this evaluation, MBLC did not formally report (in the Federal State Program Report (SPR)) a single project carried out in the furtherance of Goal 4. However, an examination of projects across all goals reveals that there was, in fact, activity in this area. Two projects, both bearing the title *Pathways to Success* were directly related to Goal 4 (Building the Workforce). Both of these projects involved providing resources and developing employment-related skills. However, one of these projects was reported under the Goal 1 (Lifelong Learning) and the other under Goal 5 (Developing Skills). Both of these projects positively impacted the achievement of the single Objective under Goal 4 (Improve users' ability to use resources and apply information for employment support). This Objective is one of the "Intents" of the Employment and Economic Development focal area.

Additional activity related to Goal 4 took place in the form of Science, Technology, Engineering, and Mathematics (STEM), Science, Technology, Engineering, Arts, and Mathematics (STEAM), and Science, Technology, Reading, Engineering, Arts, and Mathematics (STREAM) projects undertaken primarily under Goal 1 (Lifelong Learning). STEM initiatives were specifically mentioned in the 2018-2022 five year plan as being related to the Goal 4 objective. Based on the evidence gathered, the evaluators conclude that MBLC has **PARTLY ACHIEVED** Goal 4.

**Goal 5** - Due to the fact that implementing Goal 5 involved pursuing its objective primarily through subgrants, it is not surprising that the comprehensive skills development program envisioned by MBLC was significantly disrupted by the COVID-19 (Coronavirus Disease 2019) pandemic. Nevertheless, significant activities were carried out and ironically, a number of health and wellness focused projects pivoted to address pandemic-related concerns. In fact, it can be argued that the health and wellness aspect of this goal exceeded expectations while efforts in other areas such as financial literacy suffered due to library closures and difficulties related to in-person programming. Due to the mixed results of Goal 5 initiatives largely related to pandemic realities, the evaluators conclude that MBLC has **PARTLY ACHIEVED** Goal 5.

**Goal 6** - MBLC took an innovative, multi-faceted approach to pursuing its goal of Connecting Communities. The innovation aspect takes the form of building community through historical documents whereas history and digitization efforts typically promote the access to resources aspect. The evaluators believe that MBLC's approach brings their efforts closer to the intent/desired outcomes from such activities. Projects in the *Civic Hub* category perhaps embrace a more traditional approach to civic engagement; however, the pandemic presented multiple opportunities, which sub-grantees frequently seized, to redefine the characteristic of a civic hub to include both interaction in physical facilities and in the virtual world.

In fact, subgrant projects undertaken in pursuit of Goal 6 were often disrupted by the pandemic and several fell short of the full scope of activities envisioned. Nevertheless, on balance, the evaluators believe that MBLC has **ACHIEVED** Goal 6.

**A-2.** Appendix F summarizes how MBLC's implementation of their plan intersects with the IMLS Focal Areas and Intents. As was noted earlier, MBLC's six goals were specifically designed to align with all six of the focal areas. The actions undertaken by MBLC and its sub-grantees impact every one of the focal areas and intents. This is both highly unusual among the states and is a remarkable achievement.

**A-3.** No single project or activity reached the 10% expenditure threshold identified by IMLS as representing a substantial focus on a specific identified group; however, this does not mean that many of the target audiences did not significantly benefit from the efforts supported with LSTA funding. Expenditures under Goal 3 (Library Capacity Building - Strengthening Libraries) that directly or indirectly benefited the library workforce come the closest to the arbitrary criteria. Furthermore, The evaluators were able to identify individual subgrants that were awarded during the period covered by this assessment that address every single audience identified by IMLS in a substantive way.

The agency will disseminate the evaluation reports through its website and social media. The evaluators used a mixed methods approach. Data gathering included (a) interviews with agency staff members, (b) interviews with project managers for various SPR reported projects and activities, (c) focus group discussions with project teams, (d) focus group discussions with project and activity beneficiaries, (e) a broad based short survey for library staff and stakeholders with some knowledge and engagement with LSTA funded activities.

# EVALUATION REPORT

*"I can't walk into a library that hasn't done something incredible with LSTA funds... Even in libraries that got a grant five years ago, that project is still being developed and growing within the library so that funding is still benefiting so many people."*

*- Head of the Massachusetts Library System*

The assessment offered above by a prominent member of the Massachusetts library community serves as a powerful summation of what the evaluators discovered as we explored the more than one-hundred distinct LSTA-funded projects (more than 140 if ongoing projects carried out in multiple years are included) undertaken by MBLC in the three year period covered by this evaluation. LSTA-funded projects in Massachusetts have frequently had long-term effects that have continued to benefit State residents long after the federal funding has been exhausted.

It was noted in the Evaluation Summary that many LSTA-funded projects that have been completed cross over the artificial boundaries imposed by the goal structure. The evaluators found many examples where projects were reported in the SPR under one goal but had an impact on the stated objectives included in two or more goals. Because of this, the evaluators have strayed from a strict adherence to examining the effect of projects only under the goal selected for SPR reporting purposes. Instead, we have reorganized projects into coherent "families of grants" characterized by identical or closely related focal areas and intents. We have noted the movement of many specific projects from one goal to another in the body of the text and we have also provided a guide to this reorganization in Appendix H.

## Evaluation Introduction

There are six goal statements in the MBLC's ***Library Services and Technology Act: Five-Year Plan 2018 - 2022***. Each of the goals is stated below and LSTA-funded projects and activities carried out in support of the goal are described. As noted above, some specific projects have been combined into "families" of grants and are reported under the goal on which the evaluators believe the project has had the greatest effect. Finally, the evaluators' assessment at the goal level as to whether each goal has been achieved, partly achieved, or not achieved.

### Goal 1. Promoting Learning

***Goal 1 - 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.***



## Description and Discussion

Following are the titles of the evaluator-assigned “families of projects,” as well as the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on projects undertaken in support of Goal 1. To see expenditures on individual projects, please reference appendix H.

PROJECT FAMILY	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURES
Summer Reading/Learning	\$ 670,031.79
Maker Spaces/Creativity	\$ 167,624.00
STEM/STEAM/STREAM	\$ 150,402.77
Mind in the Making	\$ 147,410.00
Teens and Tweens	\$ 82,420.86
Citizenship/ESOL	\$ 49,853.00
Other	\$ 32,642.00
Dig In	\$ 28,966.00
<b>GOAL SUBTOTAL</b>	<b>\$1,329,350.42</b>

Goal 1 expenditures represent 13.64% of Massachusetts’s total LSTA allotment for the FFY 2018 – FFY 2020 period. The vast majority of projects under Goal 1 (37 out of 38) are subgrants to individual libraries, which fall into two categories. The first is “direct grants,” which stem from the statewide, annual competitive LSTA grant program. MBLC additionally runs a number of smaller, focused LSTA grant programs for limited periods of time. These will be referred to in this report as “targeted grants.” Overall, grants to libraries comprise 52.91% of total Goal 1 funding, with the single statewide project of the Summer Reading Program (SRP) accounting for the other 47.09%.

Goal 1 in MBLC’s Five Year Plan has one Objective (O) with three Projects (P): O1P1) Early learning and youth information needs and services; O1P2) Summer Reading; and O1P3) Develop and provide training programs and services that support literacy and encourage reading among underserved populations and all community members.

O1P1 is addressed by LSTA grants in the project families of *Maker Spaces/Creativity*, *Mind in the Making*, *STEM/STEAM/STREAM*, and *Teens and Tweens*. Despite their small numbers, *Mind in the Making* targeted grants were specifically mentioned by 14.6% of respondents in the evaluators’ stakeholder survey as one of the LSTA-funded projects with the greatest effect. In the words of one respondent,, “the Mind in the Making program significantly impacted library services for families, especially during the global pandemic...[when we created] pop-up library experiences for children in different locations around town.” The impact of this relatively modest investment of LSTA funds (\$10,000 to each library) was also noted by focus group participants. One library director said, “the Mind in the Making grant...was transformative,” and a Statewide

Advisory Council on Libraries (SACL) member held up the grants as an example of the complexity of assessing return on investment (ROI) for LSTA funding: if a project helps the library work towards placing the organization strategically where it needs to be, then the benefit is high regardless of the cost. “Mind in the Making helps folks with children’s departments that have a lot of inaction to get motivated. It’s lots of work to manage...[and] cost more to run it than funds received. But strategically, it will pay dividends for years to come.”

SACL also discussed the high impact of the *STEM/STEAM/STREAM* grants, especially for children in high-poverty service areas. “Those have had a huge impact...The programs have been incredibly enlightening for the kids who have taken them.” For example, “Kids Can Code” taught coding and robotics to children in grades K-5 through a 17-week series of classes, and Anytime Stem Learning targeted grants that fostered the idea of science exploration and discovery for children in grades 3 to 5 by offering a variety of STEM workshops, acquired and circulating STEM Kits, and adding STEM print materials to their collections. During the evaluation period, four direct *STEM/STEAM/STREAM* grants were funded, as well as statewide projects at MBLC in FFY 2018 and FFY 2020 that helped pay for the salary of the Consultant to the Underserved, who supports statewide STEM initiatives. Within the *Maker Spaces / Creativity* project family, LSTA supported the creation of Makerspaces in nearly a dozen libraries, as well as a Library of Things and a tabletop game program. Serving Teens and Tweens was a direct grant category running from 2012 through 2020, and was also offered via two-year targeted grants in FFY 2018 and FFY 2019. Eight libraries benefited during this cycle, using funds to engage teens and tweens through creative programming and activities that developed skills and interests as well as alter their view of what the library offers and their roles within the library. One survey respondent reflected that the grant was “helping us make a real difference in our teen and tween program offerings and was drawing more and new teens and tweens to the library.”

O1P2 is addressed by the statewide *Summer Reading* program and also by *Summer Learning* (SL) targeted grants. In the evaluators’ stakeholder survey, 27.1% of respondents mentioned SRP as one of the LSTA-funded programs with the highest impact.<sup>5</sup> The SRP has a longstanding, successful collaboration with the Boston Bruins hockey team, with team members hosting events and creating promotional materials. For the first time in FFY 2020, MBLC joined in collaboration with the women’s hockey champions -- the Boston Pride -- for the SRP, which was met with great success. Summer Learning grants were developed in FFY 2018 to complement the SRP and encourage public libraries to offer learning opportunities to school aged youth during the summer beyond SRP. Unlike direct grants, the small SL stipends did not require applicants to have a Strategic Plan, which only half of MA public libraries did as of FFY 2017. MBLC understands that Youth Services staff who run summer learning programs have little power over whether or not their library has a



<sup>5</sup> Read the full stakeholder survey report in appendix I. The majority of respondents were public library directors.

Strategic Plan, but are penalized if it does not when access to funds in their area of work are limited in this way. These grants were highly successful, with a third of recipient libraries having never previously received a direct grant. In FFY 2018, MBLC launched a pilot *Support for Summer Software* mini-grant program. The grants give libraries access to Beanstack software which allows patrons to register, track progress, earn badges, and write book reviews. This turned out to be an unanticipated asset during the pandemic, as it allowed families to stay connected to the library virtually and ensured that libraries, especially those that are economically disadvantaged, could offer an online summer program. One survey respondent said that the Beanstack mini-grant enabled “the library to remain vital to the community [during the pandemic] and expand services beyond the traditional four walls of the facility.”

O1P3 is addressed by LSTA grants in the project family of *Citizenship/ESOL*. Under this grant, libraries set up a physical space within the library as a “Citizenship Corner” featuring information on immigration and naturalization. They additionally partnered with community organizations to offer a series of workshops, provide cultural training for staff and two-year grantees, offered English language learning courses and resources and sometimes certified staff as ESOL instructors. According to MBLC staff, there are now close to 50 Massachusetts public libraries with some kind of ESOL/Citizenship Corner program. This category of grants has been offered since FFY 2016. The number of libraries applying for this grant has increased over the years, and while it offers limited funding, the staff the evaluators talked with believe it has had a high impact for the approximately 16.9% of Massachusetts residents who are foreign-born. A SACL member highlighted the program when discussing their favorite aspects of the LSTA program: “we’re offering grants that address realistic issues libraries are facing, like the Citizenship Corner. This is one of my favorites. We see the big city libraries applying for those and meeting a great need.”

Other grants were reported under Goal 1 that do not specifically address explicitly stated Plan objectives. These include *People, Places and Things Celebrating Diversity*, a two-year grant to a library at a high school with a growing Latino and Black student body. Funds purchased new materials that reflect emerging diverse voices. The library created a series of programs including an Open Mic night featuring diverse music performed by students, “Book Tasting” events, and Human Book sessions in which students spoke with and learned from diverse community members who had experienced or overcome hardships. After using project materials and participating in programs, 87.5% of surveyed students reported that their race/ethnicity was more reflected in the school library, and 100% of respondents felt more empathy for other races/ethnicities. The project exceeded its target or achievement level for the increased empathy outcome by 20%. It is important to note that while this grant didn’t specifically have an impact on the stated objective of the goal, it nevertheless advanced IMLS intents and targeted one of the under-served audiences identified in the evaluation guidelines.

While Goal 1 represents only one-eighth of LSTA funds, a SACL member summed up the impact of Goal 1 programs in these words, “we’ve been able to use a lot of these grants to pilot things and see if they work, to talk our funders into putting up permanent money based on LSTA grant success. [We can] use these funds to pivot into real budget conversations that would not have been possible otherwise.”

## Goal 1 Conclusion

Objective 1 - Project 1 of Goal 1 is addressed by LSTA grants in the project families of *Maker Spaces/Creativity*, *Mind in the Making*, *STEM/STEAM/STREAM*, and *Teens and Tweens*. Objective 1 - Project 2 is addressed by the statewide *Summer Reading* program (SRP) and also by new *Summer Learning* targeted grants. The Summer Learning stipends successfully experimented with a new level of value and equity by not requiring recipients to have a Strategic Plan, extending the reach of LSTA grants to a third of recipient libraries, who had never before received a direct grant. Objective 1 - Project 3 is addressed by LSTA grants in the project family of *Citizenship/ESOL*, which have been taken up by over 50 libraries statewide to welcome and assist the state's 16.9% of foreignborn residents. One library director reflected on Goal 1 programs in the evaluators' survey by noting that, "LSTA and the MBLC focus on equity, diversity, and belonging, gives libraries the opportunity to decenter the privileged majority, amplify unheard voices, and welcome marginalized audiences in our communities."

Not only has MBLC accomplished each of the Goal 1 Objectives from their Plan, it has leveraged a relatively small quantity of funds to make a substantial impact on the lives of citizens around the state via dozens of direct and targeted grants to libraries, as well as the statewide Summer Reading program. The evaluators conclude that Massachusetts Board of Library Commissioners has **ACHIEVED** Goal 1.

## Goal 2. Enabling Access

***Goal 2 - 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.***

### Description and Discussion

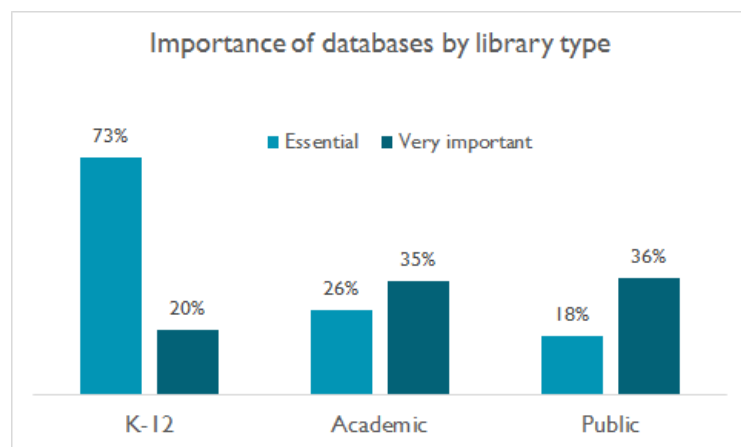
Following are the titles of the evaluator-assigned "families of projects," as well as the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on projects undertaken in support of Goal 2. To see expenditures on individual projects, please reference appendix H.

PROJECT FAMILY	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURES
Statewide Online Access	\$ 4,228,083.31
Serving the Underserved	\$ 321,609.72
Preservation/Conservation/Access	\$ 134,953.00
<b>GOAL SUBTOTAL</b>	<b>\$ 4,684,646.03</b>

Goal 2 expenditures represent the lion's share – 46.74% – of Massachusetts' total LSTA allotment for the FFY 2018 – FFY 2020 period. Five projects related to *Statewide Online Access*

account for 42.19% of total expenditures. Five projects related to *Serving the Underserved* account for 3.20% of expenditures, and eight direct grants related to *Preservation/Conservation/Access* account for 1.34% of funding. Goal 2 in MBLC's Five Year Plan has two Objectives with three Projects each: O1 - Improve users' ability to discover information resources, including: O1P1) Databases; O1P2) Ebook collections; and O1P3) Technology and connectivity; O2 - Improve users' ability to obtain and/or use information resources, including: O2P1) Serving people with disabilities or special needs; O2P2) Improve public access to local history collections; and O2P3) Digitize collections for access.

The project family of *Statewide Online Access* includes four longstanding programs that address O1P1-P3: *Access to Licensed Electronic Resources*, *Statewide Ebooks*, *Commonwealth Catalog (ComCat)* and *Public Portal*. It also includes a small FFY 2020 program, *Joining Networks*. O1P1 is addressed by *Access to Licensed Electronic Resources*. Public library-affiliated participants in a focus group with SACL stated that the most effective use of LSTA resources in the past three years was statewide databases (Appendix J), as the program frees up money at individual libraries for other services and programs. One commented that "I can't explain how much fear...goes into thinking what are we gonna do when the prices go up and there's not enough money [for statewide databases]." In a statewide survey conducted in 2020 as part of MBLC's development of a new marketing plan, 35.44% of respondents said that they used the library's online databases in the past year. In preparation for a new database



procurement in FFY 2022, MBLC ran a statewide survey in 2021 and conducted focus groups with 100 library staff around the state. They found that school and small academic libraries frequently have no access to databases outside what this program provides, and 66% of respondents rated the databases as either essential or very important to their library. Among school libraries, 73% rated them essential, underscoring the reliance this population has on the program. No

more than 3% of respondents for any library type rated databases not at all important. A continuous tension in programs such as this is the differing needs of library types. As they reflected on the past few years, MBLC staff rated the database program as its most impactful LSTA expenditure, but also highlighted its challenges. Staff report that many databases are not used by the public libraries, and a goal going forward is to find databases the public library users do find useful, such as Ancestry, specific newspapers, job and employment training databases, and to incorporate more of these into offerings. One of the biggest changes on the horizon for MBLC is a new RFP for licensed databases in which they are focusing on accessibility. Part of this RFP will be standing firm on the fact that if products are not compliant with accepted accessibility guidelines, MBLC will not license them.

O1P2 is fulfilled by the *Statewide ebooks and Audiobooks* (LEA) program, which provides access to OverDrive content to any library card holder in the state. MBLC works with the Massachusetts Library System (MLS), which offers the platform to school libraries through the SORA program, and to the non-networked public libraries. Continuing from the last funding cycle, LEA was critical during the pandemic, when usage tripled as physical locations closed and citizens sheltered at home. MBLC shifted priorities and increased LSTA funds for the program sevenfold in FFY 2020 compared to FFY 2019. This was much appreciated by library patrons, with comments such as, “During the pandemic, the public library kept me sane during the strictest part of lockdown by having numerous resources available through Overdrive.” According to the MLS, LSTA funding has been critical in the success of LEA. Members pay into the program, but MBLC provides additional LSTA funding to keep up with demand. MLS staff praised MBLC’s quick pivot and support in this area, saying they “did everything they could to complement the school curricula, purchasing SRP materials and multi-user/unlimited user licenses to drive down hold lists for students.” LEA is an extremely popular program, with 31.3% of respondents to the evaluators’ stakeholder survey listing it as one of the LSTA-funded programs with the highest impact. Additionally, a MBLC patron survey conducted in 2021 found that 71.84% of respondents reported checking out ebooks from the library in the past year. One respondent to the evaluators’ survey stated that, “Statewide eBooks and eAudiobooks is the most used and important [LSTA program] to our patrons. With more of our patrons utilizing online resources, we would not be able to serve without this program.”

Objective 1 - Project 3 is fulfilled by *ComCat*, *Public Portal*, and *Joining Networks*. *ComCat*, the Commonwealth Catalog, is the statewide interlibrary lending system. In a stakeholder survey conducted by the evaluators, a third of respondents listed ComCat as one of the LSTA-funded programs with the highest impact. In the words of one public library director, “The Commonwealth Catalog is a much-used resource at our library, filling the needs of our patrons and also serving to stretch all of our budgets further in terms of collection development.” Another director said, “the Commonwealth Catalog has greatly increased our materials offerings. It forms a bridge to the eventual statewide library card, which has been talked about in recent years.”

The *Public Portal*<sup>6</sup> (formerly the Consumer Portal) is a longstanding public facing website that connects and introduces users to library services statewide. The interface was redesigned in 2020, and the new design is currently being implemented. MBLC’s Communications Director views the Portal as a cost effective and vital tool to increase public awareness of statewide resources and programs, and key to attracting new users to libraries. The Portal connects patrons to e-resources such as ebooks and audiobooks, databases, and digital collections; to information resources such as ESL classes, early learning programs, SRP, and adult education; and to a statewide calendar of events combined from over 300 libraries. During COVID the portal became one of the most important tools for MBLC, and the only way to directly connect with consumers virtually.

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<sup>6</sup> The Public Portal: [mass.gov/libraries](https://mass.gov/libraries)

Objective 2 - Project 1 is fulfilled by programs within the project family *Serving the Underserved*. The majority of projects are direct grants; however, the largest financial commitment is Outreach to the Underserved, a longstanding statewide program that targets services to people of diverse cultural, socioeconomic and educational backgrounds including people with disabilities, those with limited English language skills, and people with limited functional literacy. This project additionally funds the Consultant to the Underserved at the MBLC. During this funding cycle, staff were able to begin working with the Massachusetts Department of Corrections to support prison library staff, as well as with the Department of Mental Health, in an effort to better coordinate support to public libraries seeking to assist people experiencing homelessness. In FFY 2019, MBLC began a new targeted grants program called Access for All, which provides grants of up to \$20,000 to individual libraries to plan and launch projects based around specific needs identified via a community assessment. In the evaluators' survey, a library director discussed their Access for All grant, saying it was the highest impact use of LSTA funds at their library. "Access for All provided for the launch of a Memory Cafe that continues today, creating a vital service for people with dementia and their caregivers." Other direct grants that meet Objective 2 - Project 1 target patrons who are homebound, differently abled, and patrons with dementia.

Objective 2 - Projects 2 and 3 are fulfilled by *Preservation/Conservation/Access* projects. MBLC offered four categories of direct grants in this project family: Preservation assessment, Preserving/conserving library and archival materials, Conserving and digitizing historical resources, and Manuscripts arrangement and description. In a survey of library stakeholders, 22.9% of respondents listed these programs as the LSTA-supported programs that had the greatest impact on their library.

The grants to libraries that fell under Preserving/conserving library and archival materials, Conserving and digitizing historical resources, and Manuscripts arrangement and description were used to enhance access to unique collections by rehousing materials, hiring archival consultants to train staff on arrangement and description, and digitizing collections in order to support efforts to enhance preservation and access of important materials of community memory and local history. In focus groups, grant recipients were emphatic about the high impact of these programs. Two great benefits of the program emerged, other than the completion of the grants themselves: the grants built trust between the libraries and the communities, and the grants built staff morale and confidence. One director said that the size of their special collections had more than tripled since the grant, because the grant engendered trust with the community. She commented that, "now people want to donate unique materials, knowing they will be protected and made accessible." The grants have helped libraries make a case for and receive additional funding from local sources; for example, for climate controlled materials storage spaces. Another director said, "this grant has given us a boost in staff morale and a great deal of staff confidence. It was hoped for and exceeded expectations. None of us felt confident navigating our historical collections...[Now] staff feel they have the techniques and skills to at least get started with archives, and they aren't scared to touch archival material like before." .

## Goal 2 Conclusion

MBLC successfully completed the six Projects that were planned in the LSTA Five Year Plan for Goal 2 through a well-balanced mix of statewide programs and grants to libraries. *Licensed Electronic Resources* (databases) is widely considered one of the most valuable uses of LSTA funds, freeing up money at individual libraries for other services and programs, and is particularly crucial to school libraries and small academic libraries. *Statewide Ebooks and Audiobooks* were particularly critical during the pandemic, when usage tripled as physical locations closed and citizens sheltered at home. MBLC pivoted quickly to shift funds where they were needed and purchasing electronic materials to complement the school curricula and SRP, increasing LSTA funds for the program sevenfold in FFY 2020. *ComCat* continues to be a much-used resource, helping libraries stretch collection development budgets and increasing their materials offerings. The *Public Portal* continued to serve its longstanding role connecting and introducing users to library services statewide, and during the pandemic the Portal became one of the most important tools for MBLC to directly connect with consumers virtually. The reach of *Preservation/Conservation/Access* grants went beyond grant completion to build lasting trust between the libraries and the communities, as well as to build staff morale and confidence. The evaluators conclude that MBLC has **ACHIEVED** Goal 2.

## Goal 3. Strengthening Libraries

***Goal 3 - 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.***

### Description and Discussion

Following are the titles of the projects and/or evaluator-assigned “families of projects” as well as the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on activities undertaken in support of Goal 3. To see expenditures on individual projects, please reference appendix H.

PROJECT FAMILY	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURES
Library Planning, Development, and Support	\$ 2,538,052.77
Web Presence	\$ 409,403.61
Preservation & Disaster Preparedness	\$ 403,921.59
<b>GOAL SUBTOTAL</b>	<b>\$ 3,351,377.97</b>

Goal 3 expenditures represent 34.38% of Massachusetts’ total LSTA allotment for the FFY 2018 – FFY 2020 period. *Library Planning, Development, and Support* represents 26.04% of funding,



two projects associated with *Web presence* accounted for 4.20% of funding, and *Preservation & Disaster Preparedness* accounted for 4.14% of expenditures.

Goal 3 in MBLC's Five Year Plan has one Objective: Provide training and professional development to enhance the skills of the library workforce and leadership. Three accompanying Projects are mentioned in the Plan: O1P1) Community-connected libraries; O1P2) Leadership development; and O1P3) Provide preservation and disaster preparedness training.

Four projects fall under *Library Planning, Development, and Support*. *Public Library Advisory* maps to O1P1 and O1P2. It is a longstanding and vital LSTA-funded program that pays for a number of MBLC staff salaries. These staff in turn provide assistance and outreach services to public library directors and staff, trustees, library friends groups, and municipal officials on a wide range of library related topics, including laws and legislation, regulations, policies formation, library governance issues, strategic planning, and the roles and responsibilities of trustee and friends' groups. In FFY 2020, adapting to service changes due to the pandemic became an integral component of all advisory services. The importance of this service was accentuated as the pandemic unfolded and local libraries frequently turned to MBLC for advice and support. MBLC staff also provide crucial resources to the library community in the form of one-on-one advisory services and a series of programming targeted to library directors, trustees, and friend's groups.

MBLC's *Strategic Planning* grant also supports O1P1. LSTA funds previously supported a strategic planning process for MBLC in 2017. A new effort was conducted in 2019 and 2020. MBLC paid the firm Sasaki in FFY 2018 to produce the Evolving Ecosystem report to understand how and why residents use public libraries across the Commonwealth and understand cooperative borrowing and use patterns of Massachusetts public libraries. The findings were used as input to MBLC's strategic planning process that will shape the services and support delivered to libraries across the state for the next five years.

The two projects that we have combined under the notation *Web Presence* along with the *Data Coordination* project collectively represent fundamental information gathering, analysis and dissemination mechanisms that connect library staff and citizens around the state to MBLC services, provide data and materials that bolster strategic planning and advocacy efforts, and connect people to local library services. *Web Presence* comprises two projects, both of which occurred in all three years of the funding cycle: *Website Support* and *Newsroom/MBLC Awarehouse*. Founded in 2017, the Awarehouse<sup>7</sup> is a website targeted to library staff that hosts MBLC-created materials for statewide campaigns, promotional items for statewide programs and services, official MBLC documents, and press release templates that libraries can use with local media. This service has been enthusiastically received by libraries, and use has increased each year with the exception of FFY 2020, due in part to the pandemic. In a FFY 2020 survey of library staff, 80% of respondents said that they were using Awarehouse materials. MBLC staff also believe uptake -- in the form of staff discovering the registering new accounts with the Awarehouse -- may be leveling off. Funds were used in FFY 2020 to work with a marketing

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<sup>7</sup> MBLC Awarehouse: <https://awarehouse.mblc.state.ma.us/>

public relations firm to develop a statewide survey to inform the development of a new three-year marketing plan. An unexpected outcome from the survey was the creation of a “resident group”: members of the public willing to virtually test and provide feedback on new promotional materials developed for statewide campaigns. The group has already provided valuable feedback for the statewide hotspot lending campaign.

*Website Support* funds the technical support and development for <http://mass.gov/mblc>, the main website for communicating with library stakeholders and residents within the Commonwealth about all of the programs and services provided by the MBLC, including the statewide library directory, statewide licensed eContent, the Commonwealth Catalog, data sets from the state aid and data coordination unit, minutes of board meetings, a special collections directory system, information about libraries offering ESL and literacy services, and more. Another long-standing program is *Data Coordination*, whereby MBLC collects usage, financial, demographic and personnel information about the hundreds of public libraries in the state to be used by libraries and local governments in planning, management, and service and budget development. MBLC staff analyze and publish the data in a series of reports on the agency’s website, and customized reports are created for libraries and for state and municipal officials on demand. Staff reported that Data Coordination has “more of an impact in the past five years than we ever imagined.”

*Preservation Assessment* grants fulfill O1P3, helping libraries to hire a professional consultant to inspect facilities and collections, and produce a report including recommendations and priorities. Libraries then create a Preservation Long-Range Plan, applying the findings to their strategic planning, library operations, and special collection development. While these grants are not as flashy as some others and can be hard to talk up for public attention, directors have been extremely pleased with their impact, as they often lead to subsequent additional local funding for capital projects or staffing. In the words of one library director, “[Our preservation assessment grant] showed the city we had something worth protecting...now the town has voted to approve funding for a town archivist and research librarian budget line! We’ve seen a huge change in just one year from this grant.”

*Statewide Environmental Monitoring and Emergency Assistance/Disaster Response and Recovery* programs are supported by the MBLC’s LSTA-funded Preservation Specialist and fulfill O1P3. Via *Environmental Monitoring*, libraries and cultural institutions are provided best practices and strategies that foster environmental conditions to optimize long-term preservation and storage of their holdings, prolonging the life of collections and allowing for continual access. The Preservation Specialist liaises with state and federal emergency management agencies; provides phone and on-site assistance to libraries; conducts disaster preparedness workshops; and monitors statewide conditions that might impact collections. In their self assessment, MBLC identified Environmental Monitoring as a program in a transitional phase that is currently being rethought. In focus groups, both SACL members and program participants discussed how COVID had reinforced their understanding of the importance of statewide disaster preparedness, whether this be for the next pandemic or for the anticipated need for climate resilience

## Goal 3 Conclusion

The evaluators believe that MBLC accomplished its single Goal 3 Objective. The *Public Library Advisory* project is a longstanding and vital LSTA-funded program that pays for a number of MBLC staff salaries. These staff in turn provide assistance and outreach services to public library directors and staff, trustees, library friends groups, and municipal officials on a wide range of library related topics, including laws and legislation, regulations, policies formation, library governance issues, strategic planning, and the roles and responsibilities of trustee and friends' groups. The *Data Coordination* project enables the collection, analysis, and dissemination of public library input and output data that provides both MBLC and local libraries with valuable information that helps to inform State and local decision-making. Two web initiatives, *Newsroom/MBLC Awarehouse--tools for librarians* and *Web Site Support* help the state library agency communicate with both the larger library community and with the public and alert local libraries of service trends and opportunities that help libraries extend their reach into the communities they serve.

Preservation assessment grants not only assist libraries to understand the preservation needs of their unique materials and to create a Preservation Long-Range Plan, applying the findings to their strategic planning, library operations, and special collection development; these grants have also led to additional local funding for capital projects or staffing for a number of libraries, serving to highlight the valuable role the library can play in preserving community history. The Environmental Monitoring program is in a transitional phase as the MBLC rethinks not so much the objective of the program as the mechanisms used to carry it out. The pandemic has reinforced the importance of statewide Emergency Assistance/Disaster Response and Recovery for library directors, who have new ideas about how future models can influence the state's readiness for disasters as varied as the next pandemic or climate resilience. The evaluators conclude that MBLC has **ACHIEVED** Goal 3.

## Goal 4 Building the Workforce

***Goal 4 - 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.***

### Description and Discussion

Following are the titles of the projects and/or evaluator-assigned "families of projects" as well as the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended directly on activities undertaken in support of Goal 3. To see expenditures on individual projects, please reference appendix H. A number of the *STEM/STEAM/STREAM* projects under Goal 1 have workforce development characteristics as well.

PROJECT FAMILY	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURES
Building the Workforce	\$ 15,000.00
<b>GOAL SUBTOTAL</b>	<b>\$ 15,000.00</b>

Goal 4 expenditures represent less than one percent (0.15%) of Massachusetts’ total LSTA allotment for the FFY 2018 – FFY 2020 period. This total consists of two *Pathways to Success* direct grants. Goal 4 in MBLC’s Five Year Plan has one Objective: Improve users’ ability to use resources and apply information for employment support. There are two accompanying Projects: O1P1) job and career development; and O1P2) STEM. The Pathways to Success grants worked towards O1P1, which sought to provide direct grants and encourage libraries to collaborate with local agencies and organizations to meet the needs of job seekers. Pathways grants provide funding for libraries to establish a work center/mentor program. Only two such grants occurred from FFY 2018 to FFY 2020, though three additional Pathways grants were funded in FFY 2021 and FFY 2022. For example, in FFY 2020 the Sawyer Free Library established a hub for job seeker resources, support and information using grant funding that will continue once the grant is completed. They provided virtual job seeker workshops with professional career counselors, one-on-one appointments for resource assistance with librarians, and created a dedicated Job Seeker Resources page on the library website. The library reports that thanks to the grant, job seekers and hiring businesses have begun contacting the library, realizing the goal of establishing the library as a community hub for job seeker information.

There was considerable activity in the area of *STEM/STEAM/STREAM* projects; however, they were very defensibly reported in the SPR under Goal 1 (Lifelong Learning) instead of under Goal 4 (Building the Workforce). *STEM/STEAM/STREAM* projects logically fit under Goal 4 as well. MBLC’s Plan talks about these projects as “programs to develop STEM knowledge and skills among library staff and encourage them to promote science literacy in their communities.” Long term workforce development implications are real, albeit not immediate. Consulting staff oversee STEM projects in libraries through visits, phone and email consultation. In addition, agency staff work closely with staff from the Massachusetts Department of Early Education and Care as well as maintain a strong partnership with the Boston Children's Museum to refine the project “Family Learning Kits in STEM.” Currently the MBLC is moving forward with a new initiative that will help libraries create pathways for equitable STEM learning in their communities. Working with Cornerstones of Science, Massachusetts will be one of several SLAAs to focus on diversity, equity, inclusion and social justice (DEISJ) skills, with the goal of helping library staff effectively engage all members of their community in pressing societal issues and assist the public library community to create a professional development agenda that results in equitable STEM learning for all members of society. This is a promising new effort around STEM and equity for Massachusetts to help lead at the national level.

## Goal 4 Conclusion

In the three year period (FFY 2018, FFY 2019, and FFY 2020) studied in this evaluation, MBLC did not formally report (in the Federal State Program Report) a single project carried out in the furtherance of Goal 4. However, an examination of projects across all goals reveals that there was, in fact, activity in this area. Two projects, both bearing the title *Pathways to Success* were directly related to Goal 4 (Building the Workforce). Both of these projects involved providing resources and developing employment-related skills. However, one of these projects was reported under the Goal 1 (Lifelong Learning) and the other under Goal 5 (Developing Skills). Both of these projects positively impacted the achievement of the single objective under Goal 4 (Improve users' ability to use resources and apply information for employment support). This objective is one of the "Intents" of the Employment and Economic Development focal area.

Additional activity related to Goal 4 took place in the form of STEM and STEAM projects undertaken primarily under Goal 1 (Lifelong Learning). STEM initiatives were specifically mentioned in the 2018-2022 five year plan as being related to the Goal 4 objective. Based on the evidence gathered, the evaluators conclude that MBLC has **PARTLY ACHIEVED** Goal 4.

## Goal 5 Developing Skills

***Goal 5 - 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.***

### Description and Discussion

Following are the titles of the projects and "families of projects" as well as the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on activities undertaken in support of Goal 5. To see expenditures on individual projects, please reference appendix H.

PROJECT FAMILY	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURES
Health Literacy	\$ 73,315.00
Family Engagement	\$ 55,964.40
Financial Literacy	\$ 13,000.00
<b>GOAL SUBTOTAL</b>	<b>\$ 142,279.40</b>

Goal 5 expenditures represent less than two percent (1.46%) of Massachusetts' total LSTA allotment for the FFY 2018 – FFY 2020 period. Goal 5 in MBLC's Five Year Plan has one Objective: 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. There are

three accompanying Projects: O1P1) Developing parenting skills through family engagement; O1P2) Financial literacy; and O1P3) Health literacy.

MBLC offered direct grant categories aligned with the three Projects from the Five Year Plan. Libraries were most enthusiastic about the Health & Wellness category, leading to the funding of nine direct grants under *Health Literacy*, which fulfilled O1P3 of the Five Year Plan. The objective of the “Health & Wellness” grant category is to leverage the library’s position as a trusted community resource to help communities explore ideas about health and wellness, which can have a significant impact on daily life, particularly for vulnerable populations. Five of nine grants had a focus on seniors, and one had a focus on teens. In a focus group with SACL members, one outcome of these grants was said to often be a deepening of community partnerships and relationships with the community organizations. Libraries collaborated with community organizations to offer programs focused on healthy aging, holistic wellness, hospice care and death, and more; to enhance collections; to offer fitness and relaxation/de-stressing classes; and to establish Memory Cafes. Memory Cafes were cited in focus groups as LSTA funded projects whose impact far outlives their initial funding. These Cafes hold regular meetings for people with memory loss, their caregivers, and community volunteers. They include movement, art therapy, and conversation. Outcomes from the grants were high when documented; for example, the Wilmington Memorial Library received 222 completed evaluation forms and 85% of respondents said they learned something new, 77% felt more confident about what they had just learned, 69% intended to apply what they had learned, and 72% were more aware of applicable services and resources.

*Financial Literacy* direct grants worked towards O1P2 of the Five Year Plan. The purpose of this grant category, which began during the last LSTA funding cycle, is to help libraries strengthen their role for improving financial literacy in their community. Successful applicants must ensure the project reaches vulnerable and marginalized populations. Only two direct grants were funded during the three year evaluation period, and both projects were forced to modify their implementation significantly due to the realities of the COVID-19 pandemic. The evaluators believe that it should be seen as a success that the Blackstone Free Public Library offered a “financial Formula for Success” programming series with 18 virtual programs and 341 attendees. In post-surveys, 67.1 % of respondents said they will implement something that they have learned into their personal financial plan, 93.3 % had a better understanding of the topic presented after attending a program, and 60% said that they felt more comfortable using library resources to help with financial literacy. Many libraries in the Commonwealth demonstrated great commitment and flexibility in pursuing the objectives of their grants in spite of the adversity presented by the pandemic.

*Family Engagement* projects worked toward O1P1 of the Five Year Plan. The “Strength in Families” direct grant category was first offered in the fall of 2020. This new program pushed libraries to undertake a more complex level of outreach than many typical LSTA projects. Based on the principles outlined in, “IDEABOOK: Libraries For Families,” which offers a research-based framework to guide libraries’ work in family engagement,<sup>8</sup> the grant encourages

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<sup>8</sup> IDEABOOK: Libraries For Families <https://globalfrp.org/Articles/Ideabook-Libraries-for-Families>

libraries to create or build on existing partnerships with community organizations that share a similar mission. A key element of the effort is to elevate the family voice in designing services to those previously underserved in their communities. The “Strength in Families” project grew out of work happening at the national level through the Public Library Association, developing in parallel with a major federal grant received by the Massachusetts Department of Elementary and Secondary Education (DESE) to implement a cross agency planning initiative to develop a framework for prenatal through young adulthood family engagement.<sup>9</sup> MBLC was a project partner to DESE in this effort. The framework came about after four years of collaboration meetings across the state. The collaboration with DESE has led to several opportunities for MBLC, including a new partnership with the Department of Public Health to promote use of local libraries as sites for COVID vaccinations for young children (“the Vaccine Equity Initiative”).

One grant was submitted and funded during the first year “Strength in Families” was offered, FFY 2020, and two additional grants have been funded for FY 2022. While organized and discussed under Goal 1, the highly successful *Mind in the Making* grants are also considered to be *Family Engagement* programs. Lastly, the national IMLS initiative, “Rethinking School Readiness” in which the Consultant to the Underserved conducts ongoing statewide training also falls under the *Family Engagement* umbrella.

## Goal 5 Conclusion

Objective 1 - Project 1 under Goal 5 was fulfilled by a combination of direct grants and statewide collaborations as well as staff development opportunities led by the MBLC Consultants. The Consultant to the Underserved conducts ongoing statewide training in the national IMLS “Rethinking School Readiness” initiative. MBLC staff worked for four years with a statewide coalition led by DESE and funded by the IMLS to develop a framework for family engagement in Massachusetts, culminating in 2020. MBLC additionally partnered with DPH to develop “the Vaccine Equity Initiative” promoting use of local libraries as sites for COVID vaccinations for children. In terms of direct grants, the “Strength in Families” grant category was first offered in the fall of 2020. This new program pushed libraries to undertake a more complex level of outreach than many typical LSTA projects. One grant was funded during the first year and two additional grants have been funded for FFY 2022. The highly successful *Mind in the Making* grants (discussed under Goal 1 in this report) are also considered important *Family Engagement* programs. Objective 1 - Project 2 was partially addressed by two small *Financial Literacy* direct grants. Objective 1 - Project 3 was fulfilled by a large number of *Health Literacy* grants. Focus group members said that one outcome of these grants was a deepening of community partnerships and relationships with community organizations. In other focus groups, *Health Literacy* Memory Cafes were cited as LSTA projects whose impact far outlives their initial funding.

Due to the fact that implementing Goal 5 involved pursuing its objective primarily through subgrants, it is not surprising that the comprehensive skills development program envisioned by

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<sup>9</sup> “Strengthening Partnerships: A framework for for-natal through young adulthood family engagement”: <https://www.doe.mass.edu/sfs/family-engagement-framework.pdf>

MBLC was significantly disrupted by the COVID-19 (Coronavirus Disease 2019) pandemic. Nevertheless, significant activities were carried out and ironically, a number of health and wellness focused projects pivoted to address pandemic-related concerns. In fact, it can be argued that the health and wellness aspect of this goal exceeded expectations while efforts in other areas such as financial literacy suffered due to library closures and difficulties related to in-person programming. The number and reach of *Financial Literacy* projects was somewhat disappointing but understandable given pandemic realities. Due to the mixed results in the ability of sub-grantees to carry out projects as envisioned, the evaluators conclude that MBLC has **PARTLY ACHIEVED** Goal 5.

## Goal 6 Connecting Communities

***Goal 6 - 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.***

### Description and Discussion

Following are the titles of the projects and “families of projects” as well as the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on activities undertaken in support of Goal 6. To see expenditures on individual projects, please reference appendix H.

PROJECT FAMILY	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURES
Go Local	\$ 117,695.00
Civic Hub	\$ 69,100.00
Social Infrastructure	\$ 38,640.30
<b>GOAL SUBTOTAL</b>	<b>\$ 225,435.30</b>

Goal 6 expenditures represent 2.31% of Massachusetts’ total LSTA allotment for the FFY 2018 – FFY 2020 period. Goal 6 in MBLC’s Five Year Plan has one Objective: Improve users’ ability to participate in their community and in local issues. There are three accompanying Projects: O1P1) Celebrate history and create new community connections; O1P2) Civic Hub; and O1P3) Connecting communities through reading.

Over a dozen *Go Local* direct and targeted grants were funded during the evaluation period, fulfilling O1P1. This grant category -- new to this evaluation period -- aimed to give public libraries the opportunity to develop projects using historical documents and artifacts to surface unknown stories, engaging citizens with projects that bridge generations and overcome cultural and socio-economic divisions. MBLC characterized their *Go Local* projects as exemplary. The



evaluators agree with this assessment. The linkage of the historical record with the concept of building community is both innovative and effective.

Example projects include the Ames Free Library's collection of local stories to commemorate the town of Easton's 300th anniversary of its founding; the Forbes Library's "Outside Voices" collection of oral histories to expand poorly documented pieces of local history centered around the gay and lesbian community; and the Oak Bluffs Public Library in Martha's Vineyard documenting the historical African American community in the area known as Cottage City. Funds were used to train staff on data collection methods and technology, to purchase technology such as podcasting and recording studios. These grants often resulted in strengthened connections between libraries and other local organizations; for example, in response to the evaluators' survey one respondent commented that, "the Go Local Grant...connected the library to other people in town with an interest in local history and resulted in the library director being invited to be appointed to the local Historical Commission. This collaboration will keep the library connected to local history and give the library an opportunity for future collaborative efforts."

Eight grants were funded via the *Civic Hub* category in fulfillment of O1P2. These projects have seen huge success engaging the community. MBLC asked fund recipients to go into their communities and find out the real issues the community is facing, then work to address those. In the words of one library director, "The Civic Hub grant supported some of the most impactful work that the library has ever done in terms of bringing the community together for important conversations on immigration and climate change." A respondent to the evaluators' survey said, "our Civic Hub grant still has people talking about it years later. The...programs we provided using LSTA funding cemented the library's reputation for quality, timely, and thoughtful programming that reflects a wide variety of topics and views." In a focus group with SACL members, one reflected that the "Civic Hub is one of the most important things we offer now...[community members are] learning about their rights, and how they can participate in the political process." SACL members believe that these grants are becoming more popular each year. Libraries developed programs that invited patrons to participate in nonpartisan information sessions around civic issues such as racial justice, climate change, LGBTQ+ rights, addiction/substance use, food equity, homelessness, poverty, and immigration and citizenship. Libraries held film screenings, moderated discussion groups, and racial healing circles; they hosted speakers, provided reading lists, informational packets, and topical displays. Some programs, such as an initiative at the Sawyer Free Library, provided opportunities for residents with diverse political and cultural viewpoints to come together and engage with each other around topics of interest to the community as a whole.

Another significant high impact, low cost LSTA-funded effort addressed O1P2. In November 2019, MBLC organized the LSTA-funded daylong summit titled, "Communities in Crisis: Massachusetts Libraries Respond to the Opioid Epidemic" with participants from 134 libraries. This program highlights the value a one-time event can have in connecting libraries to a wealth of training information and resources in their communities. Applications were subsequently opened for *Social Infrastructure Mini Grants* to symposium attendees, and 14 libraries were

awarded small grants to assist them in developing a program, service or staff training to build social infrastructure. All the projects directly applied the knowledge gained from participating in the Opioid symposium. Projects ranged from staff training on Mental Health First Aid to convening community meetings around issues of substance abuse. Two libraries did extensive staff training to help people experiencing homelessness. Some used grant funding to expand their collection in the areas of wellness, addiction and mental health. There was also a high degree of collaboration as a result of this project: a community college and the public library located in the same city applied together and did cross training around Mental Health First Aid; another library connected with a local arts organization and held a theater based program on dealing with addiction. Several libraries used funds to train the majority of staff in the Librarian's Guide to Homelessness. A number of recipients also provided training for staff in the areas of wellness, trauma response, and mental health. MBLC staff report that feedback consistently demonstrated increased awareness of the topics presented and increased awareness of available resources.

O1P3 of the Five Year Plan "Connecting communities through reading," with a proposed process of "providing and supporting direct grants for public, school and academic libraries to establish community-wide reading programs." While no grant category was aligned with Community Read support planned in O1P3, several community reads were funded via Civic Hub and Social Infrastructure Mini Grants. An all-city read was hosted by the Sawyer Free Library as part of its *Civic Hub* grant, and under the *Social Infrastructure Mini Grants*, two communities used the concept of a community read or a film as a catalyst for discussion.

## Goal 6 Conclusion

More than a dozen *Go Local* direct and targeted grants were funded during the evaluation period, fulfilling O1P1. This new grant category gave public libraries the opportunity to develop projects using historical documents and artifacts to surface unknown stories, engaging citizens with projects that bridge generations and overcome cultural and socio-economic divisions. These grants often resulted in strengthened connections between libraries and other local organizations and increased the visibility of the library within the community. The *Civic Hub* category fulfilled O1P2. According to MBLC staff, these projects have seen huge success engaging the community. MBLC asked fund recipients to go into their communities and find out the real issues the community is facing, then work to address them. In the words of one library director, "The Civic Hub grant supported some of the most impactful work that the library has ever done in terms of bringing the community together for important conversations on immigration and climate change." The LSTA-funded daylong summit, "Communities in Crisis: Massachusetts Libraries Respond to the Opioid Epidemic" represents a significant high impact, low cost LSTA-funded program that reached over a fourth of all public libraries in the state.

In short, MBLC took an innovative, multi-faceted approach to pursuing its goal of Connecting Communities (Goal 6). The innovation aspect takes the form of building community through historical documents whereas history and digitization efforts typically promote access to resources. The evaluators believe that MBLC's approach brings their efforts closer to the intent/desired outcomes. Projects in the *Civic Hub* category perhaps embrace a more traditional

approach to civic engagement; however, the pandemic presented multiple opportunities, which sub-grantees frequently seized, to redefine the characteristic of a civic hub to include both interaction in physical facilities and in the virtual world. The evaluator's conclude that Massachusetts Board of Library Commissioners has **ACHIEVED** Goal 6.

## Retrospective Assessment Questions A-2 and A-3

### **A-2. To what extent did MBLC's Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?**

The Measuring Success focal areas are: Lifelong Learning, Information Access, Institutional Capacity, Economic and Employment Development, Civic Engagement, and Human Services. MBLC's Five Year Plan goals map directly to the six measuring Success focal areas. There are no intents that do not have at least one project mapped to them. The results achieved are in line with the national priorities associated with the Measuring Success framework and their corresponding intents. Appendix F provides a detailed mapping to LSTA focal areas and intents on a project by project basis.

Goal 1 "Promoting Learning" maps to the focal area of Lifelong Learning. Of the 37 projects, all map to focal areas under Lifelong learning, nine map to Human Resources, and six to Civic Engagement. Goal 2 "Enabling Access" maps to the focal area of Information Access. Of the 20 projects, all map to Enabling Access intents and one maps to improving the library's physical and technological infrastructure and improving users' ability to participate in their community, respectively. Additionally, *Licensed electronic resources* provides databases that map to four additional intents in Human Resources, Economic and Employment Development, and Institutional Capacity. Goal 3 "Strengthening Libraries" maps to the focal area of Institutional Capacity. Of the 13 projects, all map to the third intent, improve library operations, half to improving the library's physical and technological infrastructure, five to improving the library workforce, and six additionally map to intents under Information Access. Goal 4 "Building the Workforce" maps to the focal area of Economic and Employment Development. Of the two projects, both map to the focal area intent of improving users' ability to use resources and apply information for employment support. Goal 5 "Developing Skills" maps to the focal area of Human Resources. Of the 13 projects, all map to intents within Human Resources, with the majority centered on improving users' ability to apply information that furthers their personal or family health and wellness. Goal 6 "Connecting Communities" maps to the focal area "Civic Engagement." Of the 15 projects, all map to the focal areas within Civic Engagement, with *Social infrastructure mini-grants* mapping to five additional intents within four additional focal areas.

**A-3. Did any of the following groups represent a substantial focus for MBLC’s Five-Year Plan activities? (Yes/No)**

No single project or activity reached the 10% expenditure threshold identified by IMLS as representing a substantial focus on a specific identified group; however, this does not mean that many of the target audiences did not significantly benefit from the efforts supported with LSTA funding. Expenditures under Goal 3 (Library Capacity Building - Strengthening Libraries) that directly or indirectly benefited the library workforce come the closest to the arbitrary criteria. Furthermore, the evaluators were able to identify individual subgrants that were awarded during the period covered by this assessment that address every audience identified by IMLS in a substantive way. See appendix G for a breakdown of projects mapped to audiences.

## Process Questions B-1, B-2, and B-3

**B-1. How has MBLC used any data from the State Program Report (SPR) and elsewhere (e.g., Public Libraries Survey) to guide activities included in the Five-Year Plan?**

SPR data is used by the MBLC Director and by other key staff, especially in relation to the state library administrative agency’s strategic plan, to ensure that pertinent activities are taking place. Elements of SPR submissions are included in a variety of the agency's reports to the public, to the library community, and to state government. Data from the SPR is also used to establish benchmarks that are reviewed on a periodic basis to assess progress toward the goals stated in the LSTA 2018–2022 Five-Year Plan. Finally, SPR data has been shared with QualityMetrics, LLC for the purposes of this assessment.

**B-2. Specify any modifications MBLC made to the Five-Year Plan. What was the reason for this change?**

The 2018-2022 LSTA Five-Year Plan was not amended or modified.

**B-3. How and with whom has MBLC shared data from the SPR and from other evaluation resources? How has MBLC used the last Five-Year Evaluation to inform data collected for the new Five-Year Evaluation? How has MBLC used this information throughout this five-year cycle?**

Data derived from the SPR is used internally for planning and evaluation purposes. It is shared directly with key MBLC staff, advisory groups (including the State Advisory Council on Libraries), as appropriate with stakeholders, and is shared indirectly as excerpts of statistical data and text are included in written and/or oral reports with Library Commissioners, legislators, and other public officials. SPR data has also been shared with QualityMetrics, LLC for the purposes of this evaluation.

## Methodology Questions C-1, C-2, C-3, and C-4

### **C-1. Identify how MBLC implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of an Independent Evaluator.**

To ensure rigorous and objective evaluation of the Massachusetts Board of Library Commissioners' (MBLC) implementation of the LSTA Grants to States program, MBLC, in cooperation with eight other state library administrative agencies (SLAAs) in the northeast United States, participated in the issuance of a joint Request for Proposals (RFP) for a "Cooperative Library Services and Technology Act Five-Year Plan Evaluation 2018-2022" through the Council of State Library Agencies in the Northeast (COSLINE). The RFP was issued on June 14, 2021 with proposals due by July 12, 2021.

As a result of a competitive bidding process, QualityMetrics LLC, a library consulting firm headquartered in Silver Spring, Maryland, was awarded the contract to conduct the independent LSTA evaluation. QualityMetrics LLC does not have a role in carrying out other LSTA-funded activities and is independent of those who are being evaluated or who might be favorably or adversely affected by the evaluation results.

QualityMetrics LLC has in-depth evaluation experience and demonstrated professional competency in conducting LSTA Grants to States evaluations. QualityMetrics Director and Chief Executive Officer Dr. Martha Kyrillidou, carried out more than 20 such evaluations for the 2013-2017 cycle. In addition, QualityMetrics associate consultant, Bill Wilson, has been part of a total of more than 50 LSTA evaluations spanning each five-year cycle since 2002 either as a partner in Himmel & Wilson, Library Consultants or as a research consultant with QualityMetrics.

Principal consultant Dr. Martha Kyrillidou has deep experience in library evaluation over her 22 years of service at the Association of Research Libraries (ARL). Dr. Kyrillidou has taught Research Methods and Assessment, and Evaluation courses at the University of Maryland and at Kent State University and has extensive practical experience in mixed methods, evaluation and outcomes assessment. Martha is a current member of the Library Statistics Working Group (LSWG), chair of the NISO Z39.7 standard, and mentoring the next generation of public library staff and evaluators.

Mr. Wilson has extensive experience with federal funding programs for libraries dating back to the 1970s serving on Wisconsin's Library Services and Construction Act (LSCA) Advisory Committee and interactions with multiple state library administrative agencies since his service as Wisconsin's State Librarian in the 1990s. Mr. Wilson has also completed extensive graduate/doctoral-level coursework in statistics and research methods.

Ms. Chapman has over a decade of experience working in assessment and data analysis in academic, state, and consortial libraries. She worked as the Data Analysis & Communications Consultant and State Data Coordinator in the Library Development office of the State Library of

North Carolina and has currently served for eight years as the Assessment Analyst & Consultant at Duke University Libraries.

**C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.**

QualityMetrics, LLC deployed a mixed methods protocol for data collection that is multi-faceted and rigorous. Reviewing demographic data, quantitative Public Libraries Survey (PLS) data, and SPR data formed the basis of our knowledge from the stage of responding to the RFP for an independent evaluator and throughout the evaluation process. Providing a cloud-based storage space for MBLC to deposit additional data and files and reflect on the program was the basis of our initial interaction. After conducting an initial Zoom conference call with representatives of the Massachusetts Board of Library Commissioners at the beginning of the evaluation process and a second phone call to discuss the agencies self-reflection on whether goals have been achieved, partly achieved, or not achieved, the evaluators stayed in regular touch (monthly sessions) with the agency as the evaluation team was gathering data. In addition to updating MBLC leadership on progress, the sessions were used to resolve emerging questions and to solicit additional relevant information. Data gathering included (a) interviews with agency staff members, (b) interviews with project managers for various SPR reported projects and activities, (c) focus group discussions with project teams, (d) focus group discussions with project and activity beneficiaries, (e) a broad based short survey for library staff and stakeholders with some knowledge and engagement with LSTA funded activities collecting primarily qualitative contextual information about past activities and future needs.

Researchers and evaluators across the globe are adjusting to the new realities that accompany the pandemic. The technical note below is merely an example.

COVID-19 presented special circumstances and a number of considerations had to be taken into account. The crisis brought the imperative of changing how evaluation work is done and how we engage policymakers, programme managers and beneficiaries as restrictions on travel and ‘social distancing’ are expected to last.<sup>10</sup>

While no on-site visits to the State Library Agency or to LSTA sub-grant recipient libraries were conducted during this evaluation period, two of the primary investigators for QualityMetrics (Dr. Martha Kyrillidou and Mr. William Wilson) had visited the Massachusetts Board of Library Commissioners’ offices in Boston, MA as part of the 2013-2017 LSTA evaluation cycle and consequently were somewhat familiar with MBLC’s operation. Virtual (Zoom) one-on-one

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<sup>10</sup> OECD/DAC and IEO/UNDP (2020) Guidance Note: Good practices during COVID-19; UNICEF Evaluation Office (2020) Technical Note: Response of the UNICEF Evaluation Function to the COVID-19 Crisis; WFP Office of Evaluation (2020) Technical Note for {Planning and Conducting Evaluations During COVID-19; UNFPA Evaluation Office (2020) Adapting evaluations to the COVID-19 pandemic; UNDP Independent Evaluation Office (2020) Event planning and implementation during COVID-19; ILO Evaluation Office (2020) Implications of COVID-19 on evaluations in the ILO; FAO Office of Evaluations (2020) Risk analysis and guidance for the management and conduct of evaluations during international and national level COVID-190 crisis and restrictions.

interviews were held with the agency MBLC Director and with key staff engaged in LSTA and in specific projects carried out under the LSTA Five Year Plan. The Five Year Evaluation is a summative assessment and as such the availability of the SPR data was extremely useful, even more so than in previous evaluation cycles.

The evaluators noted in several states, including Massachusetts, that COVID-19 circumstances have underscored, and in some ways strengthened, the state library agency role. During a time of crisis the profession and the communities were seeking advice and often turned to the State Library Agency for answers. Many SLAAs responded by holding frequent and regular statewide community meetings with various groups which elevated the importance of the LSTA activities even when they were disrupted by the pandemic. Creative solutions were identified in most instances as most programs had to turn into virtual delivery for most of the pandemic period. In some ways, the record of virtual programming is more evident and its impact more readily documented. However, in our assessment, the evaluators were aware of the risk of minimizing the adverse effects on marginalized communities which often are more difficult to reach during times of crisis such as was presented by the pandemic.

The toll on the mental health of our communities has also been evident as these restrictions are establishing new norms for interacting in person. Student learning and well being have been concerns as the education life cycle was disrupted. Opportunities to help students catch up with unfinished learning were plentiful and many state library agencies, including MBLC, have adjusted or augmented their database offerings to help home-schooled children and teens. Monitoring community behaviors took place frequently during the pandemic often resulting in people feeling over-surveyed in many instances. This directly impacted the approach that the evaluators took to surveys.

A web-based survey targeting the library community was conducted between October 18 and November 9, 2021. The survey (Appendix E) provided some supplementary quantitative information as well as considerable qualitative information. Additional corroborative evidence from comments collected in the survey served to triangulate the evidence gathered.

Validity and reliability analysis reflect a positivist worldview and in a qualitative naturalistic approach they are being redefined with some divergent views on whether and how one ensures quality and rigor in qualitative inquiry. The notion that naturalistic inquiry needs to exhibit quality, rigor, and trustworthiness is more widespread nowadays.

The evaluators engaged in numerous conversations through Zoom interviews. The quality and rigor of these interviews has been enhanced by exploring website links, using Google Maps Street View to get a sense of the size and neighborhood context of libraries receiving subgrants, internal triangulation and, in some instances, by asking interviewees to allow the conversation to be recorded with assurances for confidentiality. Quality and rigor were also enhanced by having two evaluators participate in most focus groups and interviews. Shared note-taking was available in real time through shared Google Docs and Google Drive access. This approach allowed evaluators to refine their inquiry and tailor it as knowledge of MBLC's LSTA program was accumulating from one interaction to the next. Recorded conversations also allow the evaluators

to reflect and refine their interpretations in a reliable manner. The validity of the inquiry was strengthened with the informed selection of the subjects by the MBLC leadership team and staff.

**C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation. How did QualityMetrics in cooperation with MBLC engage them?**

Numerous small-group virtual sessions and telephone interviews were conducted with library staff and with other persons with knowledge of LSTA-funded initiatives. Given the pandemic and restricted travel, the evaluators often utilized Google Maps Street View to get a sense of the size and environment surrounding the libraries represented by interviewees. The focus groups and interviews provided both qualitative evidence and context that supplemented a review of agency-supplied statistical data and information and data submitted in the form of the SPR.

Interviewees shared their knowledge of LSTA utilization, enhancing interactions and depth and quality of the conversations. Principal investigators Martha Kyrillidou, Bill Wilson, and Joyce Chapman conducted individual and joint interviews as well as group sessions and discussed their observations with each other to develop a shared understanding of the meaning of the library experience and how it was supported by the MBLC with LSTA support. All three investigators participated in many of the agency interviews, allowing for the concept of triangulation to be implemented as evaluators debriefed and compared interpretations and understandings.

**C-4. Discuss how MBLC will share the key findings and recommendations with others.**

The Massachusetts Board of Library Commissioners will share the findings of the evaluation with the library community, with a variety of partner agencies in Massachusetts (governmental, other public, and non-profit), and with the broader public by alerting libraries of the availability of the assessment report. The report will be publicly available on the agency website as well as on the IMLS website.

## **Conclusion**

This evaluation would be remiss if it did not acknowledge the increased funding that the state agencies have received through the Coronavirus Aid, Relief and Economic Security Act (CARES) and the American Recovery Plan Act (ARPA). The MBLC, like every other state agency, has been successful in disbursing these one-time additional sources of funding. Often with the same level of staff they had before, they successfully dispersed twice the amount of the LSTA funding as the annual funding stream was augmented with this one-time infusion of support. A big thank you to all parties involved for helping our communities and libraries thrive during the unprecedented times of COVID-19.



# APPENDICES

## Appendix A: Acronyms

ALS - Academic Libraries Survey  
ARL - Association of Research Libraries  
ARPA - American Recovery Plan Act  
CARES - Coronavirus Aid, Relief and Economic Security Act  
ComCat - Commonwealth Catalog  
COP - Community of Practice  
COSLINE - Council of State Library Agencies in the Northeast  
COVID-19 - Coronavirus Disease - 2019  
DEISJ - Diversity, equity inclusion and social justice  
DESE - Massachusetts Department of Elementary and Secondary Education  
DPH - Massachusetts Department of Public Health  
EISi - Elementary/Secondary Information System  
E-Rate - the schools and libraries universal service support program  
FFY - Federal Fiscal Year  
FTE - Full Time Equivalent  
ILS - Integrated Library System  
IMLS - Institute of Museum and Library Services  
LEA - Library eBooks and Audiobooks (Statewide ebooks and Audiobooks)  
LLC - Limited Liability Company  
LoT - Library of Things  
LSCA - Library Services and Construction Act  
LSTA - Library Services and Technology Act  
LSWG - Library Statistics Working Group  
MBLC - Massachusetts Board of Library Commissioners  
MLS - Massachusetts Library System  
NAAL - National Assessment of Adult Literacy  
NCES - National Center for Educational Statistics  
NEDCC - Northeast Document Conservation Center  
O - Objective (from the LSTA Five Year Plan)  
OBE - Outcome-Based Evaluation  
OCLC - Online Computer Library Center  
OPAC - online public access catalog  
P - Project (from the LSTA Five Year Plan)  
PLS - Public Library Survey  
PLSC - Public Library Statistics Cooperative  
RFP - Request for Proposal  
ROI - Return-on-investment  
SACL - Statewide Advisory Council on Libraries  
SFL - Sawyer Free Library  
SL - Summer Learning  
SLAA - State Library Administrative Agency  
SPR - State Program Report  
SRP - Summer Reading Program  
STEAM - Science Technology Engineering, Arts and Mathematics  
STEM - Science, Technology, Engineering, and Mathematics  
STREAM - Science, Technology, Reading, Engineering, and Mathematics

## Appendix B: Interviewees/ Focus Groups

### Interviewees

James Lonergan, Director, MBLC
Rob Favini, Head, Library Advisory & Development, MBLC
Lyndsay Forbes, Project Manager & Grants Specialist, MBLC
Shelley Quezada, Consultant to the Underserved, MBLC
Mary Rose Quinn, Head of State Programs / Government Liaison, MBLC
Celeste Bruno, Communications Director, MBLC
Evan Knight, Preservation Specialist, MBLC
Kate Butler, Electronic Services Specialist, MBLC
Sarah Sogigian, Executive Director, Massachusetts Library System
Bexx Caswell-Olsen, Director of Book Conservation, Northeast Document Conservation Center

### Focus groups

State Advisory Council on Libraries (4 participants)
Direct Grant Recipients (two focus groups, 5 total participants)
Preservation & Disaster Preparedness (6 participants)
Library Directors (5 participants)

## Appendix C: Bibliography of Documents Reviewed

### State Agency Sources

1. 5-year Strategic Planning documents, MBLC
2. 3-year Communications Plan survey and documents, MBLC
3. Database Procurement process materials: survey findings, community and stakeholder discussion sessions, update for the board)
4. Direct Grant: Brockton - Citizenship Corners
5. SACL grant review guidelines
6. Direct Grant: Dig In grant - Scituate
7. Direct Grant Categories -- description pages
8. MBLC Awarehouse
9. Database feedback survey - responses - April 2021
10. Database Survey Questions
11. Update for the board (2021) database procurement process

### Federal Government Publications

#### Federal Agency Data Sources

- Institute of Museum and Library Services, [State Program Report \(SPR\) report](#)
- Institute of Museum and Library Services, [Public Library Statistics](#)
- Institute of Museum and Library Services, [State Profiles](#)
- Institute of Museum and Library Services [“Grants to States” Conference](#)
- Institute of Museum and Library Services, [State Library Administrative Agency Survey](#)
- National Center for Education Statistics, [Academic Libraries](#)
- National Center for Education Statistics, [Elementary and Secondary Information System](#)
- United States Census Bureau, [Decennial Census](#) (April 1, 2020)

#### Evaluation Resources and COVID-19

- OECD/DAC and IEO/UNDP (2020) [Guidance Note: Good practices during COVID-19.](#)
- UNICEF Evaluation Office (2020) [Technical Note: Response of the UNICEF Evaluation Function to the COVID-19 Crisis.](#)
- WFP Office of Evaluation (2020) [Technical Note for Planning and Conducting Evaluations During COVID-19.](#)
- UNFPA Evaluation Office (2020) [Adapting evaluations to the COVID-19 pandemic.](#)
- UNDP Independent Evaluation Office (2020) [Event planning and implementation during COVID-19.](#)
- ILO Evaluation Office (2020) [Implications of COVID-19 on evaluations in the ILO.](#)

- FAO Office of Evaluations (2020) [Risk analysis and guidance for the management and conduct of evaluations during international and national level COVID-19 crisis and restrictions.](#)

## Other Resources

- Ethel Himmel and William J. Wilson. The Functions and Roles of State Library Agencies. American Library Association, Chicago, 2000.
- The Institute of Museum and Library Services. 2021. [Functions and Roles of State Libraries: 2000 and 2020.](#) Washington, DC: Institute of Museum and Library Services.
- The Institute of Museum and Library Services. (2021). [The Use and Cost of Public Library Materials: Trends Before the COVID-19 Pandemic.](#) Washington, DC: The Institute.
- The Institute of Museum and Library Services. 2021. [Understanding the Social Wellbeing Impacts of the Nation's Libraries and Museums.](#) 2021 Report. Washington DC: Institute of Museum and Library Services.
- The Institute of Museum and Library Services. 2021. [Functions and Roles of State Libraries: 2000 and 2020.](#) Washington, DC: Institute of Museum and Library Services.
- Measures that Matter: [Workforce Development Literature Review](#), January 12, 2021.
- Pelczar, M., Frehill, L. M., Nielsen, E, Kaiser, A., Hudson, J., & Wan, T. (2021). [Characteristics of Public Libraries in the United States: Results from the FY 2019 Public Libraries Survey.](#) Institute of Museum and Library Services: Washington, D.C. Results from the SDC E-Resources Survey (received January 2022).
- Sarah Mervosh, "[The pandemic hurt these students the most.](#)" In print "Pandemic widened U.S. Educational Gap into a Gulf, Research Suggests." *New York Times*, July 28, 2021, Section A, Page 13.
- The School Librarian Investigation: Decline or Evolution? <https://libslide.org/>

# Appendix D: Focus Group Questions

## Focus group questions

### General Questions

1. What stands out as being the most effective use of LSTA in Massachusetts and over the last three years?
2. Are there specific examples of projects that you think were the most impactful on the lives of the citizens of Massachusetts?
3. Are there specific changes in how LSTA funds should be expended in the future? Are there new or emerging needs that are unmet that need to be addressed?

### Potential Follow-up Questions

1. What type of programs work for library patrons and staff, in general?
2. What type of programs work for public library patrons, school and academic library clientele, and library staff specifically?
3. What do non-participating libraries and borderline participants need to be able to participate in, grant funded projects or statewide programs?
4. How will the library patrons and library staff be satisfied with the delivery of services?
5. What programs will result in cost savings for participating libraries?

### Outcome Questions

1. Will more patrons use the library services because of the grant programs?
2. Will there be an increase in community involvement in relation to the grant programs?
3. Will customer service improve due to staff training from LSTA funded events?
4. Will the statewide programs enhance libraries' abilities to serve patrons?

### Interview guidelines

1. Introductions (include that you are working for QualityMetrics, a library consulting firm headquartered in Silver Spring, Maryland, established in 2016). Ask them to tell you a bit about themselves.
2. Ask about their familiarity with the LSTA program. If they are unfamiliar you can provide some or all of the below info -
  - a. *The Library Services and Technology Act's (LSTA) "Grants to States" program is the single largest source of ongoing federal funding for libraries. Many states spend funds on a combination of statewide initiatives and on subgrants awarded to individual libraries to enable them to launch innovative efforts or to extend services to populations that are difficult to reach.*
  - b. *The LSTA program requires that each state conduct an evaluation of its LSTA program every five years. These evaluations are overseen by the Institute of*

*Museum and Library Services but are conducted by independent evaluators. QualityMetrics was selected to conduct the state-level evaluations for nine states in the Northeast and our company is also working with more than a dozen additional states and territories. The results of our review are due to be submitted to IMLS in March of 2022.*

3. FOR THOSE WHO DO NOT WORK FOR THE SLAA (who manage a project):
  - a. Ask them to talk about the particular grant/s they worked with. Allow them to lead the conversation in an exploratory fashion. Ask follow up questions.
  - b. Identify where there are materials or data from their projects that it would be useful for us to see.
4. FOR THOSE WHO DO NOT WORK FOR THE SLAA (high level stakeholder):
  - a. Go through the plan goal by goal, remind them of the goal wording and the percent of funds the state spent on it, get their reflections on progress toward each goal.
  - b. Are there any future needs we should be emphasizing in the evaluation?
5. FOR SLAA STAFF on specific projects:
  - a. Ask them to talk about the particular programs they are responsible for
  - b. Let them know the data available (SPR, output, etc.) and verify that there is no other data or materials they have that would be helpful to us. If they only listed outputs in the SPR outcomes data, ask about plans for outcome data in the future.
  - c. What do you see as the needs moving forward for the next seven years?
6. ALL: What impact have you seen LSTA dollars have on your state?
7. ALL: Is there anything you think we should have asked that we didn't?

# Appendix E: Web-Survey Instrument

Massachusetts LSTA Survey 2021

## WELCOME

Every five years, each state library administrative agency in the nation is required to conduct an independent evaluation of its implementation of the Library Services and Technology Act (LSTA) "Grants to States" program. This evaluation must be submitted in order to qualify for ongoing Federal funding.

Following close on the heels of the evaluation is the requirement for the submission of a new state-level five-year plan for the LSTA program. QualityMetrics, Library Consultants is assisting the Massachusetts Board of Library Commissioners (MBLC) with the evaluation.

QualityMetrics has been gathering information and data from a number of different sources including the State Program Report (SPR) that MBLC submits annually to the Institute of Museum and Library Services (IMLS), internal statistical and narrative reports, survey data, and personal interviews with MBLC staff as well as with representatives of the library community in the state. We'd like your help in assessing the impact of the LSTA program on your library and on the people that your library serves.

You are invited to share your thoughts and ideas by answering three short questions. The survey should take you no more than ten minutes to complete. The first question asks you to look back over the last few years and to consider how the LSTA program has benefited libraries and library users. Second, we'd like to invite you to think about the future and to suggest new ways in which you think LSTA funds should be invested. Finally, we want to give you an opportunity to offer any other observations about Massachusetts's LSTA program (positive or negative). Thank you in advance for helping the Massachusetts Board of Library Commissioners serve your community better!

## BACKGROUND

Massachusetts receives approximately \$3.2 million in LSTA Grants to States funding each year. The largest portion of this funding (about 43%) has been allocated to support of the goal Library Capacity Building, with programs such as Public Library Advisory, data coordination, Summer Reading, newsroom/MBLC Awarehouse, website support, statewide library eBooks and audiobooks, and environmental monitoring.

The second largest portion (41%) of the budget supports Lifelong Learning, with programs such as access to licensed electronic resources, Mind in the Making, STEM and STEAM, IdeaLab, Summer Learning, Serving Tweens and Teens, and Citizenship Corners and expanded English language access.

The third largest portion (13%) supports Access to Information, with programs such as Commonwealth Catalog, Outreach to the Underserved, Public Portal, statewide eBooks, Access for All, Preserving Historic Collections, and Serving People with Disabilities.

The fourth largest portion (3.5%) comprises Direct Grant projects in several goal areas: Connecting Communities, with programs such as the social infrastructure mini grants, Go Local, Family Engagement, and Civic Hub; Developing Skills, with programs such as Food For Thought: a Community Gardening Initiative, Pathways to Success, and health and wellness; and the last goal, Building the Workforce, which does not yet have any active LSTA-funded programs associated with it.

LSTA dollars are used to supplement state and local funds and to foster creativity and innovation in meeting the needs of Massachusetts's existing and potential library users and citizens.

#### LOOKING BACK

The LSTA Five Year Plan that we are evaluating covers 2018-2022. Think back over the past few years (2018 and on). Which, if any, of the LSTA-supported programs mentioned above have had the greatest impact on your library and on the people your library serves? How is library service in your community better because of the investment of LSTA funds?

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#### LOOKING AHEAD

Look ahead to the next five years (2023 - 2027). Are there changes in the way that LSTA dollars are invested that you think would significantly improve library services in Massachusetts? If so, what are they and why do you think that the change(s) would make a difference. (Note that LSTA funding cannot be used for building facilities or for lobbying purposes.)

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#### OTHER COMMENTS

Please feel free to offer any additional comments about Massachusetts's LSTA program. What do you like or dislike about the program? What could be improved? (Note that your responses are confidential and comments will not be identified with an individual or with a specific library.)

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OPTIONAL DEMOGRAPHIC QUESTIONS

The library that I represent is:

- A public library
- A school library
- An academic library
- A special library
- Other (Please specify below.)

If you responded "Other" to the question above, please specify the type of library you represent in the text box provided below.

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My role in the library that I represent is:

My role in the library that I represent is:

- Director
- Manager or Department Head
- Youth Services staff
- Adult Services staff
- Technical Services staff
- Technology Specialist
- Circulation/ILL staff
- Library Trustee
- Other (Please specify below.)

If you responded "Other" to the question above, please specify your role in the library you represent in the text box provided below.

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Thank You!

## Appendix F: Measuring Success Crosswalk Table

<b>MASSACHUSETTS</b>							
<b>Measuring Success Focal Areas and Intents</b>							
<b>100 projects total</b>							
		Goal 1: Promoting Learning	Goal 2: Enabling Access	Goal 3: Strengthening Libraries	Goal 4: Building the Workforce	Goal 5: Developing Skills	Goal 6: Connecting Communities
<b>Lifelong Learning</b>							
Improve users' formal education	6						
Improve users' general knowledge and skills	37					1	
<b>Information Access</b>							
Improve users' ability to discover information resources		10	1				
Improve users' ability to obtain and/or use information resources		14	5			1	
<b>Institutional Capacity</b>							
Improve the library workforce		1	5				1
Improve the library's physical and technological infrastructure		1	7				
Improve library operations			13				1
<b>Economic &amp; Employment Development</b>							
Improve users' ability to use resources and apply information for employment support		1			2		
Improve users' ability to use and apply business resources		1					
<b>Human Resources</b>							
Improve users' ability to apply information that furthers their personal, family or household finances		1				2	
Improve users' ability to apply information that furthers their personal or family health & wellness	5					9	1
Improve users' ability to apply information that furthers their parenting and family skills	4					2	
<b>Civic Engagement</b>							
Improve users' ability to participate in their community	5	1					8
Improve users' ability to participate in community conversations around topics of concern	1						5

## Appendix G: Targeted Audiences Crosswalk Table

MASSACHUSETTS Target Population Served	Targeted Audiences											
	Library Workforce (current and future)	Individuals Living Below the Poverty Line	Individuals who are unemployed/ underemployed	Ethnic or Minority Populations	Immigrants/Refugees	Individuals with Disabilities	Individuals with Limited Functional Literacy or Information Skills	Families	Children (aged 0-5)	School-aged Youth (aged 6-17)	General (aged 18-64)	Senior (aged 65+)
1.1 Citizenship/ESOL				YES	YES							
1.2 Purposeful Play (Mind in the Making)	YES							YES	YES			
1.3 STEM/STEAM/STREAM	YES							YES	YES	YES		
1.4 Maker Spaces/Creativity										YES	YES	
1.5 Summer Reading/Learning						YES	YES	YES	YES	YES	YES	
1.6 Dig In											YES	
1.7 Serving Tweens and Teens									YES			
2.1 Statewide Online Access			YES						YES	YES		
2.2 Serving the Underserved	YES	YES				YES			YES		YES	
2.3 Preservation/Conservation /Access	YES											
3.1 Library Planning, Development, and Support	YES											
3.2 Preservation & Disaster Preparedness	YES											
3.3 Web Presence	YES											
4.1 Building the Workforce			YES									
5.1 Family Engagement							YES					
5.2 Financial Literacy											YES	
5.3 Health Literacy											YES	YES
6.1 Go Local											YES	
6.2 Civic Hub											YES	
6.3 Social Infrastructure	YES			YES							YES	

# Appendix H: Expenditure Tables

## Goal 1 Expenditures: Promoting Learning

PROJECT TITLE	TYPE	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE EXPENDITURE TOTAL
Dig In: How Does Your Garden Flow?	Subgrant			X			\$ 8,975.00	\$ 8,975.00	0.68%	0.09%
Dig In: Pondsides Patio	Subgrant			X			\$ 9,991.00	\$ 9,991.00	0.75%	0.10%
Dig In: Garden Information Series	Subgrant			X			\$ 10,000.00	\$ 10,000.00	0.75%	0.10%
Toward a Community Culture of Fitness	Subgrant	X	X		\$ -	\$ 8,000.00	\$ 7,000.00	\$ 15,000.00	1.13%	0.15%
Open: Enhancing YA and New Adult Engagement with Tabletop Games	Subgrant			X			\$ 5,000.00	\$ 5,000.00	0.38%	0.05%
Housatonic Creates!	Subgrant	X			\$ -	\$ 9,624.00	\$ -	\$ 9,624.00	0.72%	0.10%
IdeaLab	Subgrant	X			\$ 51,000.00	\$ -	\$ -	\$ 51,000.00	3.84%	0.52%
ideaSPACE	Subgrant	X			\$ -	\$ 15,000.00	\$ -	\$ 15,000.00	1.13%	0.15%
CreateLab	Subgrant	X			\$ -	\$ 15,000.00	\$ -	\$ 15,000.00	1.13%	0.15%
IdeaLab: Teen & TEC Lab	Subgrant	X			\$ -	\$ 15,000.00	\$ -	\$ 15,000.00	1.13%	0.15%
IdeaLab	Subgrant	X			\$ -	\$ 15,000.00	\$ -	\$ 15,000.00	1.13%	0.15%
IdeaLab: Maker Space	Subgrant	X			\$ -	\$ 15,000.00	\$ -	\$ 15,000.00	1.13%	0.15%
IdeaLab: Create, Learn, and Inspire	Subgrant			X			\$ 12,000.00	\$ 12,000.00	0.90%	0.12%
IdeaLab: Exploration Station Maker Lab: Norfolk	Subgrant			X			\$ 15,000.00	\$ 15,000.00	1.13%	0.15%
Innovative: People, Places and Things Celebrating Diversity	Subgrant	X	X		\$ -	\$ 6,000.00	\$ 6,000.00	\$ 12,000.00	0.90%	0.12%
Innovative: Chatham Reads	Subgrant	X			\$ 5,642.00	\$ -	\$ -	\$ 5,642.00	0.42%	0.06%
Mind in the Making: Read, Play, Grow	Subgrant	X			\$ -	\$ 10,000.00	\$ -	\$ 10,000.00	0.75%	0.10%
Mind in the Making Purposeful Play	Subgrant	X			\$ -	\$ 10,000.00	\$ -	\$ 10,000.00	0.75%	0.10%
Mind in the Making: PLAY! Possibilities, Learning and You	Subgrant	X			\$ -	\$ 10,000.00	\$ -	\$ 10,000.00	0.75%	0.10%
									<i>Continued on following page</i>	

PROJECT TITLE	TYPE	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE EXPENDITURE TOTAL
Mind in the Making	Subgrant	X			\$ 69,947.00		\$ 47,463.00	\$ 117,410.00	8.83%	1.20%
Literacy and Our Town, Perfect Together	Subgrant	X			\$ 15,000.00	\$ -	\$ -	\$ 15,000.00	1.13%	0.15%
STEM and STEAM	Statewide	X	X		\$ 41,573.82	\$ 13,831.45	\$ 18,301.50	\$ 73,706.77	5.54%	0.76%
Anytime STEM Learning	Subgrant	X	X		\$ 36,167.00	\$ 7,500.00	\$ -	\$ 43,667.00	3.28%	0.45%
Science is Everywhere	Subgrant			X			\$ 7,500.00	\$ 7,500.00	0.56%	0.08%
Brockton Kids Can Code	Subgrant	X			\$ 10,529.00	\$ -	\$ -	\$ 10,529.00	0.79%	0.11%
Serving Tweens and Teens: Making a Home for Easthampton's Youth	Subgrant		X		\$ -	\$ 6,558.00	\$ -	\$ 6,558.00	0.49%	0.07%
Serving Teens and Tweens: Stevens Memorial Library	Subgrant			X			\$ 10,400.00	\$ 10,400.00	0.78%	0.11%
Serving Teens and Tweens: Minnd, Body, and World Wellness	Subgrant			X			\$ 9,450.00	\$ 9,450.00	0.71%	0.10%
Serving Tweens and Teens	Subgrant	X			\$ 32,570.86	\$ -	\$ -	\$ 32,570.86	2.45%	0.33%
Serving Tweens and Teens	Subgrant	X	X		\$ 16,642.00	\$ 6,800.00	\$ -	\$ 23,442.00	1.76%	0.24%
Summer Learning	Subgrant	X	X		\$ 24,047.00	\$ 20,000.00	\$ -	\$ 44,047.00	3.31%	0.45%
Summer Reading	Statewide	X	X	X	\$ 230,759.05	\$ 237,461.87	\$ 157,763.87	\$ 625,984.79	47.09%	6.42%
Citizenship Corners and Expanded English Language Access	Subgrant	X	X		\$ 7,500.00	\$ 6,292.00	\$ -	\$ 13,792.00	1.04%	0.14%
INCITE: Invest in Citizenship and Expanded English Learning	Subgrant		X	X	\$ -	\$ 7,900.00	\$ 7,100.00	\$ 15,000.00	1.13%	0.15%
Citizenship Corners and Expanded English Language Services	Subgrant	X			\$ 5,700.00	\$ -	\$ -	\$ 5,700.00	0.43%	0.06%
Pathways to Citizenship	Subgrant			X			\$ 6,653.00	\$ 6,653.00	0.50%	0.07%
Citizenship Corners & Expanded English Language Services	Subgrant	X			\$ 8,708.00	\$ -	\$ -	\$ 8,708.00	0.66%	0.09%
<b>GOAL SUB-TOTAL</b>					<b>\$ 555,785.73</b>	<b>\$ 434,967.32</b>	<b>\$ 338,597.37</b>	<b>\$ 1,329,350.42</b>	<b>100.00%</b>	<b>13.64%</b>

## Goal 2 Expenditures: Enabling Access

PROJECT TITLE	TYPE	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE EXPENDITURE TOTAL
		X	X	X						
Access to Licensed Electronic Resources	Statewide	X	X		\$ 987,203.68	\$ 1,111,778.99	\$ 621,376.00	\$ 2,720,358.67	58.07%	27.91%
Statewide eBooks	Statewide	X			\$ 89,300.86	\$ 102,126.00	\$ 715,180.58	\$ 906,607.44	19.35%	9.30%
Joining Networks	Statewide			X			\$ 6,520.00	\$ 6,520.00	0.14%	0.07%
Commonwealth Catalog	Statewide	X	X	X	\$ 185,384.47	\$ 115,281.38	\$ 171,188.27	\$ 471,854.12	10.07%	4.84%
Public Portal	Statewide	X	X		\$ 30,494.94	\$ 66,296.88	\$ 25,951.26	\$ 122,743.08	2.62%	1.26%
Outreach to the Underserved	Statewide	X	X	X	\$ 99,389.70	\$ 86,060.17	\$ 90,489.85	\$ 275,939.72	5.89%	2.83%
Dementia Friendly Nahant - Helping Everyone Live, Age and Thrive	Subgrant	X			\$ 7,500.00	\$ -	\$ -	\$ 7,500.00	0.16%	0.08%
First Contact: Students and Primary Sources	Subgrant	X			\$ 7,500.00	\$ -	\$ -	\$ 7,500.00	0.16%	0.08%
Access for All	Statewide		X	X	\$ -	\$ 7,500.00	\$ 11,935.00	\$ 19,435.00	0.41%	0.20%
Serving People With Disabilities	Subgrant	X			\$ 6,985.00	\$ -	\$ -	\$ 6,985.00	0.15%	0.07%
Library on the Go: Going Mobile, Delivering the Northborough Free Library to Your Door	Subgrant	X			\$ 4,250.00	\$ -	\$ -	\$ 4,250.00	0.09%	0.04%
Preserving Newburyport's Historic Collections Project	Subgrant	X	X		\$ 21,215.00	\$ 8,785.00	\$ -	\$ 30,000.00	0.64%	0.31%
Enhancing Access and Preservation for Ipswich Newspapers	Subgrant		X		\$ -	\$ 30,000.00	\$ -	\$ 30,000.00	0.64%	0.31%
Preservation and Conservation of Library and Archival Materials	Subgrant	X			\$ 14,167.00	\$ -	\$ -	\$ 14,167.00	0.30%	0.15%
Archives Arrangement and Description: Athol Public Library	Subgrant		X		\$ -	\$ 10,000.00	\$ -	\$ 10,000.00	0.21%	0.10%
Manuscripts Arrangement and Description	Subgrant	X			\$ 7,270.00	\$ -	\$ -	\$ 7,270.00	0.16%	0.07%
Archives Arrangement and Description: Thomas Crane Public Library, Quincy	Subgrant		X		\$ -	\$ 2,730.00	\$ -	\$ 2,730.00	0.06%	0.03%
Protecting Priority Collections: Blandford	Subgrant			X			\$ 5,088.00	\$ 5,088.00	0.11%	0.05%
Protecting Priority Collections: Howe Library, Mass Eye and Ear	Subgrant			X			\$ 5,698.00	\$ 5,698.00	0.12%	0.06%
Conserving and Digitizing Gloucester's History	Subgrant	X			\$ 30,000.00	\$ -	\$ -	\$ 30,000.00	0.64%	0.31%
<b>GOAL SUB-TOTAL</b>					<b>\$ 1,490,660.65</b>	<b>\$ 1,540,558.42</b>	<b>\$ 1,653,426.96</b>	<b>\$ 4,684,646.03</b>	<b>100.00%</b>	<b>48.06%</b>

### Goals 3 Expenditures: Strengthening Libraries

PROJECT TITLE	TYPE	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE EXPENDITURE TOTAL
Data Coordination	Statewide	X	X	X	\$ 328,512.55	\$ 318,672.98	\$ 265,889.87	\$ 913,075.40	27.24%	9.37%
Newsroom/MBLC Awarehouse--tools for librarians	Statewide	X	X	X	\$ 81,725.19	\$ 73,794.77	\$ 60,710.47	\$ 216,230.43	6.45%	2.22%
Web Site Support	Statewide	X	X	X	\$ 72,381.93	\$ 51,740.00	\$ 69,051.25	\$ 193,173.18	5.76%	1.98%
Public Library Advisory	Statewide	X	X	X	\$ 472,738.62	\$ 463,326.87	\$ 585,728.88	\$ 1,521,794.37	45.41%	15.61%
Strategic Planning	Statewide		X		\$ -	\$ 81,982.38	\$ -	\$ 81,982.38	2.45%	0.84%
Library Ecosystem	Statewide	X			\$ 21,200.62	\$ -	\$ -	\$ 21,200.62	0.63%	0.22%
Environmental Monitoring	Statewide	X	X	X	\$ 64,716.58	\$ 25,737.92	\$ 34,808.00	\$ 125,262.50	3.74%	1.28%
Emergency Assistance/Disaster Response and Recovery	Statewide	X	X		\$ 33,099.92	\$ 33,555.31	\$ 42,791.36	\$ 109,446.59	3.27%	1.12%
Preservation Assessment	Statewide	X	X	X	\$ 12,600.00	\$ 29,400.00	\$ 33,600.00	\$ 75,600.00	2.26%	0.78%
Town-Wide Preservation Assessment and Collection Identification	Subgrant	X			\$ 19,762.50	\$ -	\$ -	\$ 19,762.50	0.59%	0.20%
Town-Wide Preservation: Montague	Subgrant			X			\$ 30,000.00	\$ 30,000.00	0.90%	0.31%
Town-Wide Preservation: Sutton	Subgrant			X			\$ 17,350.00	\$ 17,350.00	0.52%	0.18%
Town-Wide Preservation: Swampscott	Subgrant			X			\$ 26,500.00	\$ 26,500.00	0.79%	0.27%
<b>GOAL SUB-TOTAL</b>					<b>\$ 1,106,737.91</b>	<b>\$ 1,078,210.23</b>	<b>\$ 1,166,429.83</b>	<b>\$ 3,351,377.97</b>	<b>100.00%</b>	<b>34.38%</b>

**Goal 4 Expenditures: Building the Workforce**

PROJECT TITLE	TYPE	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE EXPENDITURE TOTAL
Pathways to Success: Gloucester	Subgrant		X				\$ 7,500.00	\$ 7,500.00	50.00%	0.08%
Pathways to Success	Subgrant	X			\$ 7,500.00	\$ -	\$ -	\$ 7,500.00	50.00%	0.08%
<b>GOAL SUB-TOTAL</b>					<b>\$ 7,500.00</b>	<b>\$ -</b>	<b>\$ 7,500.00</b>	<b>\$ 15,000.00</b>	<b>100.00%</b>	<b>0.15%</b>

**Goal 5 Expenditures: Developing Skills**

PROJECT TITLE	TYPE	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE EXPENDITURE TOTAL
Family Engagement	Subgrant	X	X		\$ -	\$ 27,662.89	\$ 18,301.51	\$ 45,964.40	32.31%	0.47%
Strength in Families: Engage and Empower: Family Literacy Advocates	Subgrant			X			\$ 10,000.00	\$ 10,000.00	7.03%	0.10%
Financial Literacy for All Ages: A Formula for Success	Subgrant	X			\$ -	\$ 7,500.00	\$ -	\$ 7,500.00	5.27%	0.08%
Financial Literacy for All Ages: Financial Fitness for Life	Subgrant	X			\$ -	\$ 5,500.00	\$ -	\$ 5,500.00	3.87%	0.06%
At the Table: Everyone is Welcome at the Table	Subgrant			X			\$ 10,000.00	\$ 10,000.00	7.03%	0.10%
At the Table	Subgrant			X			\$ 10,000.00	\$ 10,000.00	7.03%	0.10%
Health and Wellness: Serving those with Memory Loss and their Caregivers	Subgrant	X			\$ -	\$ 7,500.00	\$ -	\$ 7,500.00	5.27%	0.08%
Health and Wellness	Subgrant	X			\$ -	\$ 7,500.00	\$ -	\$ 7,500.00	5.27%	0.08%
Health and Wellness: Holistic Wellness for All	Subgrant			X			\$ 7,500.00	\$ 7,500.00	5.27%	0.08%
Health and Wellness: Aging in Place: Keeping 60-70 Seniors Connected to the Billerica Community	Subgrant			X			\$ 7,500.00	\$ 7,500.00	5.27%	0.08%
Health and Wellness: On the Road to Healthy Senior Living	Subgrant			X			\$ 7,500.00	\$ 7,500.00	5.27%	0.08%
Health and Wellness: Renew Your Health at the Library	Subgrant			X			\$ 7,500.00	\$ 7,500.00	5.27%	0.08%
Food for Thought: A Community Gardening Initiative	Subgrant	X			\$ 8,315.00	\$ -	\$ -	\$ 8,315.00	5.84%	0.09%
<b>GOAL SUB-TOTAL</b>					<b>\$ 8,315.00</b>	<b>\$ 55,662.89</b>	<b>\$ 78,301.51</b>	<b>\$ 142,279.40</b>	<b>100.00%</b>	<b>1.46%</b>



### Goal 6 Expenditures: Connecting Communities, Total expenditures and Administrative Overhead

PROJECT TITLE	TYPE	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018 - FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE EXPENDITURE TOTAL
Go Local: Building Communities and Collections	Subgrant	X			\$ -	\$ 7,500.00	\$ -	\$ 7,500.00	3.33%	0.08%
Go Local: Nature in Nahant	Subgrant	X			\$ -	\$ 7,500.00	\$ -	\$ 7,500.00	3.33%	0.08%
Go Local: Celebrating the Centennial, Creating Community	Subgrant	X			\$ -	\$ 6,905.00	\$ -	\$ 6,905.00	3.06%	0.07%
Go Local: Elisha Converse 2020	Subgrant	X			\$ -	\$ 6,050.00	\$ -	\$ 6,050.00	2.68%	0.06%
Go Local: Building & Preserving Historical Artifacts of Leverett	Subgrant	X			\$ -	\$ 6,000.00	\$ -	\$ 6,000.00	2.66%	0.06%
Go Local: Postcards from Falmouth	Subgrant	X			\$ -	\$ 5,090.00	\$ -	\$ 5,090.00	2.26%	0.05%
Go Local: Celebrating 300 Years of Bellingham, 1719-2019	Subgrant	X			\$ -	\$ 2,050.00	\$ -	\$ 2,050.00	0.91%	0.02%
Go Local: Postcards from Falmouth	Subgrant		X				\$ 9,910.00	\$ 9,910.00	4.40%	0.10%
Go Local: Nature in Nahant	Subgrant		X				\$ 7,500.00	\$ 7,500.00	3.33%	0.08%
Civic Hub	Subgrant	X	X		\$ 22,500.00	\$ -	\$ 22,500.00	\$ 45,000.00	19.96%	0.46%
Civic Hub: Engaging Gloucester	Subgrant	X			\$ -	\$ 7,500.00	\$ -	\$ 7,500.00	3.33%	0.08%
Civic Hub: Community Conversations	Subgrant	X			\$ -	\$ 7,500.00	\$ -	\$ 7,500.00	3.33%	0.08%
Sewing Threads of Diversity	Subgrant		X				\$ 9,100.00	\$ 9,100.00	4.04%	0.09%
Go Local	Subgrant	X	X		\$ 37,495.00	\$ -	\$ 21,695.00	\$ 59,190.00	26.26%	0.61%
Social Infrastructure Mini Grants	Subgrant		X		\$ -	\$ 38,640.30	\$ -	\$ 38,640.30	17.14%	0.40%
<b>GOAL SUB-TOTAL</b>					<b>\$ 59,995.00</b>	<b>\$ 94,735.30</b>	<b>\$ 70,705.00</b>	<b>\$ 225,435.30</b>	<b>100.00%</b>	<b>2.31%</b>
	LSTA PROGRAM ADMINISTRATION				\$ 54,703.71	\$ 132,193.84	\$ 104,333.33	\$ 291,230.88		2.90%
<b>GRAND TOTAL EXPENDITURES</b>					<b>\$ 3,283,698.00</b>	<b>\$ 3,336,328.00</b>	<b>\$ 3,419,294.00</b>	<b>\$ 10,039,320.00</b>		
LSTA GRANTS TO STATES ALLOTMENT					\$ 3,283,698.00	\$ 3,336,328.00	\$ 3,419,294.00	\$ 10,039,320.00		

Project families and Projects	Expenditures
<b>Goal 1</b>	
<b>Citizenship/ ESOL</b>	<b>\$ 49,853.00</b>
Citizenship Corners & Expanded English Language Services	\$ 8,708.00
Citizenship Corners and Expanded English Language Access	\$ 13,792.00
Citizenship Corners and Expanded English Language Services	\$ 5,700.00
INCITE: Invest in Citizenship and Expanded English Learning	\$ 15,000.00
Pathways to Citizenship	\$ 6,653.00
<b>Dig In</b>	<b>\$ 28,966.00</b>
Dig In: Garden Information Series	\$ 10,000.00
Dig In: How Does Your Garden Flow?	\$ 8,975.00
Dig In: Pondsides Patio	\$ 9,991.00
<b>Maker Spaces/ Creativity</b>	<b>\$ 167,624.00</b>
CreateLab	\$ 15,000.00
Housatonic Creates!	\$ 9,624.00
IdeaLab	\$ 66,000.00
IdeaLab: Create, Learn, and Inspire	\$ 12,000.00
IdeaLab: Exploration Station Maker Lab: Norfolk	\$ 15,000.00
IdeaLab: Maker Space	\$ 15,000.00
IdeaLab: Teen & TEC Lab	\$ 15,000.00
ideaSPACE	\$ 15,000.00
Open: Enhancing YA and New Adult Engagement with Tabletop Games	\$ 5,000.00
<b>Other</b>	<b>\$ 32,642.00</b>
Innovative: Chatham Reads	\$ 5,642.00
Innovative: People, Places and Things Celebrating Diversity	\$ 12,000.00
Toward a Community Culture of Fitness	\$ 15,000.00
<b>Purposeful Play</b>	<b>\$ 147,410.00</b>
Mind in the Making	\$ 117,410.00
Mind in the Making Purposeful Play	\$ 10,000.00
Mind in the Making: PLAY! Possibilities, Learning and You	\$ 10,000.00
Mind in the Making: Read, Play, Grow	\$ 10,000.00
<b>STEM/STEAM/STREAM</b>	<b>\$ 150,402.77</b>
Anytime STEM Learning	\$ 43,667.00
Brockton Kids Can Code	\$ 10,529.00
Literacy and Our Town, Perfect Together	\$ 15,000.00
Science is Everywhere	\$ 7,500.00
STEM and STEAM	\$ 73,706.77
<b>Summer Reading/ Learning</b>	<b>\$ 670,031.79</b>
Summer Learning	\$ 44,047.00
Summer Reading	\$ 625,984.79
<b>Teens and Tweens</b>	<b>\$ 82,420.86</b>
Serving Teens and Tweens: Mind, Body, and World Wellness	\$ 9,450.00
Serving Teens and Tweens: Stevens Memorial Library	\$ 10,400.00
Serving Tweens and Teens	\$ 56,012.86
Serving Tweens and Teens: Making a Home for Easthampton's Youth	\$ 6,558.00

Project families and Projects	Expenditures
☐ Goal 1	\$ 1,329,350.42
☐ Goal 2	\$ 4,684,646.03
☐ <b>Preservation/Conservation/Access</b>	\$ 134,953.00
Archives Arrangement and Description: Athol Public Library	\$ 10,000.00
Archives Arrangement and Description: Thomas Crane Public Library, Quincy	\$ 2,730.00
Conserving and Digitizing Gloucester's History	\$ 30,000.00
Enhancing Access and Preservation for Ipswich Newspapers	\$ 30,000.00
Manuscripts Arrangement and Description	\$ 7,270.00
Preservation and Conservation of Library and Archival Materials	\$ 14,167.00
Preserving Newburyport's Historic Collections Project	\$ 30,000.00
Protecting Priority Collections: Blandford	\$ 5,088.00
Protecting Priority Collections: Howe Library, Mass Eye and Ear	\$ 5,698.00
☐ <b>Serving the underserved</b>	\$ 321,609.72
Access for All	\$ 19,435.00
Dementia Friendly Nahant - Helping Everyone Live, Age and Thrive	\$ 7,500.00
First Contact: Students and Primary Sources	\$ 7,500.00
Library on the Go: Going Mobile, Delivering the Northborough Free Library to Your Door	\$ 4,250.00
Outreach to the Underserved	\$ 275,939.72
Serving People With Disabilities	\$ 6,985.00
☐ <b>Statewide online access</b>	\$ 4,228,083.31
Access to Licensed Electronic Resources	\$ 2,720,358.67
Commonwealth Catalog	\$ 471,854.12
Joining Networks	\$ 6,520.00
Public Portal	\$ 122,743.08
Statewide eBooks	\$ 906,607.44
☐ Goal 3	\$ 3,351,377.97
☐ <b>Library Planning, Development, and Support</b>	\$ 2,538,052.77
Data Coordination	\$ 913,075.40
Library Ecosystem	\$ 21,200.62
Public Library Advisory	\$ 1,521,794.37
Strategic Planning	\$ 81,982.38
☐ <b>Preservation &amp; Disaster Preparedness</b>	\$ 403,921.59
Emergency Assistance/Disaster Response and Recovery	\$ 109,446.59
Environmental Monitoring	\$ 125,262.50
Preservation Assessment	\$ 75,600.00
Town-Wide Preservation Assessment and Collection Identification	\$ 19,762.50
Town-Wide Preservation: Montague	\$ 30,000.00
Town-Wide Preservation: Sutton	\$ 17,350.00
Town-Wide Preservation: Swampscott	\$ 26,500.00
☐ <b>Web Presence</b>	\$ 409,403.61
Newsroom/MBLC Warehouse--tools for librarians	\$ 216,230.43
Web Site Support	\$ 193,173.18

Project families and Projects	Expenditures
☐ Goal 1	\$ 1,329,350.42
☐ Goal 2	\$ 4,684,646.03
☐ Goal 3	\$ 3,351,377.97
☐ Goal 4	
☐ Building the Workforce	\$ 15,000.00
Pathways to Success	\$ 7,500.00
Pathways to Success: Gloucester	\$ 7,500.00
☐ Goal 5	
☐ Family Engagement	\$ 55,964.40
Family Engagement	\$ 45,964.40
Strength in Families: Engage and Empower: Family Literacy Advocates	\$ 10,000.00
☐ Financial Literacy	\$ 13,000.00
Financial Literacy for All Ages: A Formula for Success	\$ 7,500.00
Financial Literacy for All Ages: Financial Fitness for Life	\$ 5,500.00
☐ Health Literacy	\$ 73,315.00
At the Table	\$ 10,000.00
At the Table: Everyone is Welcome at the Table	\$ 10,000.00
Food for Thought: A Community Gardening Initiative	\$ 8,315.00
Health and Wellness	\$ 7,500.00
Health and Wellness: Aging in Place: Keeping 60-70 Seniors Connected to the Billerica Community	\$ 7,500.00
Health and Wellness: Holistic Wellness for All	\$ 7,500.00
Health and Wellness: On the Road to Healthy Senior Living	\$ 7,500.00
Health and Wellness: Renew Your Health at the Library	\$ 7,500.00
Health and Wellness: Serving those with Memory Loss and their Caregivers	\$ 7,500.00
☐ Goal 6	
☐ Civic Hub	\$ 69,100.00
Civic Hub	\$ 45,000.00
Civic Hub: Community Conversations	\$ 7,500.00
Civic Hub: Engaging Gloucester	\$ 7,500.00
Sewing Threads of Diversity	\$ 9,100.00
☐ Go Local	\$ 117,695.00
Go Local	\$ 59,190.00
Go Local: Building & Preserving Historical Artifacts of Leverett	\$ 6,000.00
Go Local: Building Communities and Collections	\$ 7,500.00
Go Local: Celebrating 300 Years of Bellingham, 1719-2019	\$ 2,050.00
Go Local: Celebrating the Centennial, Creating Community	\$ 6,905.00
Go Local: Elisha Converse 2020	\$ 6,050.00
Go Local: Nature in Nahant	\$ 15,000.00
Go Local: Postcards from Falmouth	\$ 15,000.00
☐ Social Infrastructure	\$ 38,640.30
Social Infrastructure Mini Grants	\$ 38,640.30

# Appendix I: Web-Survey Report

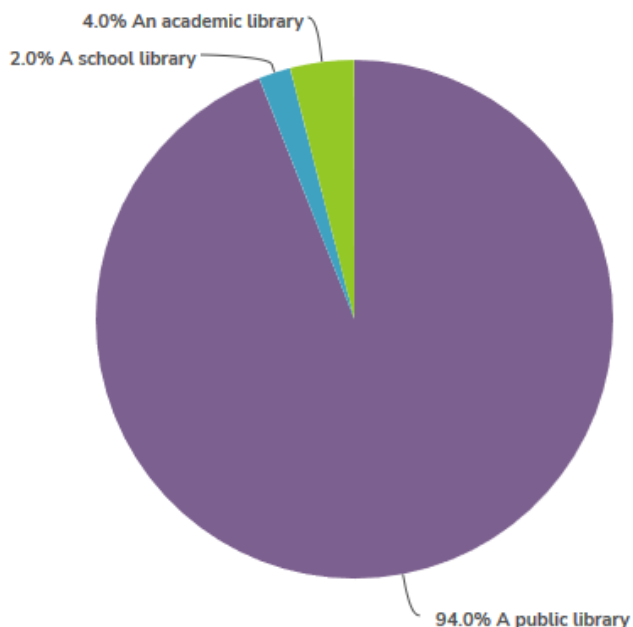
## Library Stakeholder Survey LSTA Five-Year Evaluation

As part of the 2018-2022 LSTA Five Year Plan evaluation process, the Massachusetts Board of Library Commissioners (MBLC) worked with independent evaluators to distribute a survey to library stakeholders. The survey was built in Alchemer survey software and distributed by MBLCL staff via relevant listservs. The survey ran from October 18th through November 10th, 2021. The goals of the survey were to assess the impact of the funds provided by the LSTA program on the libraries of Massachusetts, and to additionally inform the library's 2023-2027 Five-Year Plan for LSTA funds. The survey asked respondents to look back over the last few years and to consider how expenditures within the LSTA program have benefited libraries and library users, to think about the future and to suggest changes to the ways in which LSTA funds could be invested, and provided the opportunity for respondents to offer any other observations about the MBLC's LSTA program. The six goals of the current Five Year LSTA Plan were shared with respondents in the survey's introduction (Lifelong Learning, Enabling Access, Library Capacity Building, Building the Workforce, Developing Skills, and Connecting Communities).

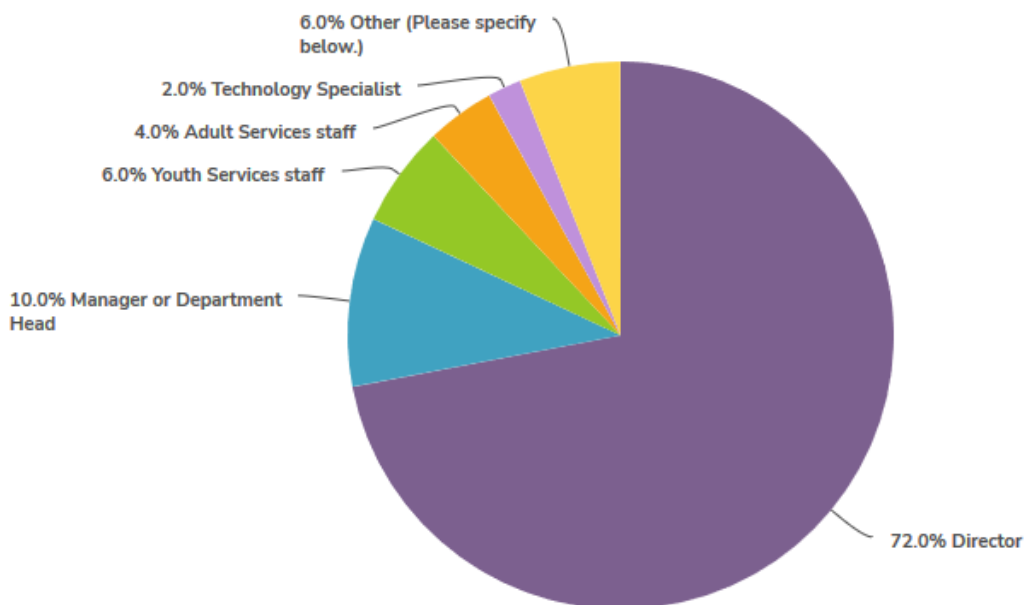
### Findings

The survey received 53 responses, 50 of which were complete. As shown in Figure 1, 94% (47) of 50 respondents work in public libraries, 4% (2) work in academic libraries and 2% (1) work in school libraries. Figure 2 shows that 72% of respondents (36) were library directors and an additional 10% were managers or department heads.

**Figure 1. The type of library in which respondents work**

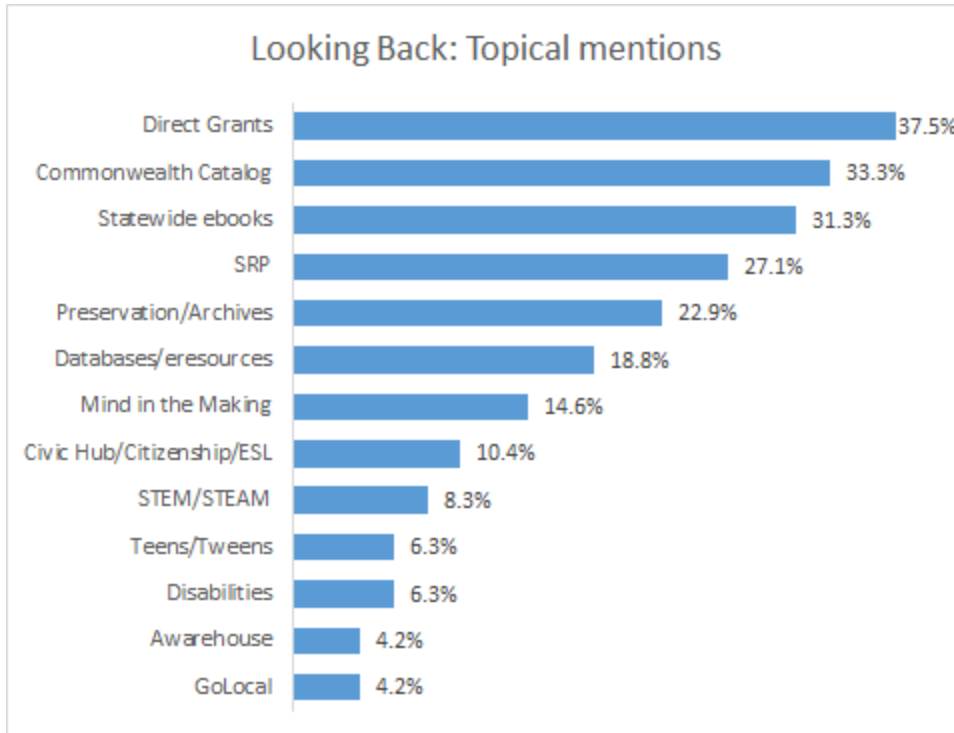


**Figure 2. Role of respondent within their library**



### Looking back

The first question asked respondents to think back over the past three years and discuss which LSTA-supported programs had the greatest impact on the library and the people the library serves. While examples of funded projects were provided for each area, respondents were not asked to specifically comment on each. We received 50 responses to this question. Programs praised as impactful at least two times were coded by response, and results can be seen in the figure below. Overall, direct grants were mentioned by 37.5% of respondents, with some specific grant categories also highlighted (i.e., Mind in the Making at 14.6%). Roughly a third of respondents also discussed the impact of the Commonwealth Catalog and the statewide ebook and e-audiobook program, and 27.1% praised Summer Reading Program (SRP) support.



A sample of comments from this question can be found below.

“Public library budgets are most often crafted with the intent to get ‘the best bang for the buck’ in order to maintain services...City Councilors usually want reassurance that the funds are being spent on the large (majority) audiences, on popular or high profile projects...However, LSTA and the MBLC focus on equity, diversity, and belonging, gives libraries the opportunity to decenter the privileged majority and amplify unheard voices and welcome marginalized audiences in our communities.”

“LSTA provides...support that allows us to initiate and build new resources and programming. Once we have developed the service and promotion, we can sustain it over as many years as there is a community need.”

“The Civic Hub grant supported some of the most impactful work that the Library has ever done in terms of bringing the community together for important conversations on immigration and climate change.”

“We've had huge success with services, programs, and resources provided to our community thanks to LSTA funds. From extra money to use to bring in programmers we otherwise couldn't afford, to expanding our ebook collection, to growing our ‘Library of Things,’ LSTA funds have been instrumental in allowing our library to be flexible, growing and adapting to rapid changes.”

“The Commonwealth Catalog is a much-used resource at our library, filling the needs of our patrons and also serving to stretch all of our budgets further in terms of collection development. The ability to serve a wider community allows us, as selectors, to purchase niche items that we know will have interest for a limited audience statewide and not just for our own library patrons.”

The Mind in the Making grant...was transformative. More parents and children use the play space before and after story time programs, and often even older children enjoy the...area.”

“The Go Local Grant...connected the library to other people in town with an interest in local history and resulted in the library director being invited to be appointed to the local Historical Commission. This collaboration will keep the library connected to local history and give the library an opportunity for future collaborative efforts.”

### Looking forward

Respondents were asked to think ahead to the years covered by the upcoming Five-Year Plan (fiscal years 2023 - 2027) and discuss changes in the way that LSTA dollars are invested that would significantly improve library services. We received 42 responses to this question. These responses will be examined in depth as part of the planning process for the next LSTA Five-Year plan; for now, several themes and quotes are included below.

Ideas for areas of expanded or new LSTA support include adult digital literacy; purchasing technology for individual libraries and training staff on use of technology; a statewide library card; more intentional ways of supporting small, rural libraries; continued and increased funding for programs that enhance equity, social justice, and positive civic engagement; a re-focus on underserved communities; improving ease of applying for and receiving direct grants, as well as considering changes to the grant categories; more funding for professional development; and providing support for website creation and maintenance for small libraries. A selection of comments for this question can be found below.

“I have seen libraries doing more collaboration on programming...I would love to see more collaboration built into the structure of funding; possibly with more support. My sense is that these funds can often make the most meaningful impact on our smaller communities, where staff are usually stretched the most... so much so that the grant process can be too much. (Even though MBLC does a great job of working with libraries to make it as accessible as possible.) Perhaps collaborative library grants could help?”



“We have found that LSTA grants are often very specific and not practical to implement. It would be of more value to provide thematic grants that are given based on a proposal rather than a grant for a very specific program.”

“Though I feel a strategic plan is important and worth having, not every library has the capacity or personnel to file long range plan every 3-5 years to qualify for LSTA funds..Changes? .if the library has an up to date strategic plan on file, it will qualify for 100% of the request; if not, then the library may qualify for a small portion of the request. At least, the library will have the chance to make a difference in the community.”

“Other states use a portion of LSTA funds on a large program that reaches all parts of its state...I wonder if MBLC ought to think about a sustained funding of a large-scale program to bring all communities into conversation while also bringing attention to the community-building functions of library programming.”

“I feel like I am pretty knowledgeable about how library funding works, and I don't think I realized how much LSTA touches library services. I know that we have to do a lot of PR and advocacy, but would it help to convey the message that we also rely on this type of federal funding for these services that we take for granted? I know it's one more thing and I know we are exhausted.”

#### Other comments

Finally, respondents were provided with a free text field in which to provide any additional comments. We received 29 responses to this question, 21% of which consisted of praise for the MBCL's LSTA program and staff:

“I love the support from MBLC, the staff is amazing. You all go above and beyond to help us with grant writing and more.”

#### Additional ideas:

“Could use funds to provide training for staff to facilitate community conversations e.g. equity and diversity issues, political issues, climate change, etc.”

Many of the comments in this section focused on the Direct Grants program, including reflections on the timeline, application process, rules, and coverage. A few such comments are included below.

“Marketing the grant is a struggle for me and perhaps other librarians. Maybe help each library with a "promoting your grant in the community" package to increase participation and community support.”

“You offer workshops on the application process. Perhaps there could be more professional development opportunities that are adjacent to the LSTA process and grants: ‘conducting community surveys’ ‘the difference between inclusion and belonging,’ ‘decentering the library: community partnerships,’ ‘using qualitative and quantitative measurements for success’... content that would help directors and librarians with imagining and implementing LSTA programs.”

“I would prefer multi-year funding opportunities in order to sustain activities, also the ability to expend funds over 2 fiscal years.”

“...it's possible I'm just undereducated on this, but the process and timelines for applying for these grants seems a little opaque to me. I feel like I'm often hearing about grants coming available only shortly before applications are due (and I do subscribe to, and usually keep up with, various email lists including all regions).”

# Appendix J: Databases in Massachusetts

## Background

Statewide database programs are a crucial service supported at various levels by the vast majority of state library agencies across the United States.<sup>11</sup> Meeting user needs in virtual as well as physical spaces is a critical component of state library agency services; even as physical visits and circulation decline at public libraries (a trend likely to be further exacerbated by the COVID-19 pandemic), both the usage and availability of electronic resources has expanded.<sup>12</sup>

To understand the snapshot of the database resources and programs provided by the state agency, it is important to note that funding models for statewide databases have shifted considerably in the last few decades. For example, between 2000 and 2020 state library agencies' overall spending on statewide database licensing increased from 42.29 million to 74.04 million dollars (spent by 48 state libraries). Within this increase however, state library agencies were very unlikely to be the sole source of support for statewide databases; in fact, in 2020 89.6 percent of statewide database licensing was carried out by multiple entities and funding sources.<sup>13</sup> In an informal 2021 survey of state data coordinators, it was found that although the majority of states offer support for a statewide databases program (41 of 44 respondents), many of those are not managed through the state library agency (only 33 reported state library management). Thirty-six of these respondents also noted the existence of a local e-resource consortium in the state.

Often these statewide database programs are supported in part through LSTA funding, as well as state funding, library cost-shares, grants, and external, but often complementary, consortial programs.<sup>14</sup> Each statewide database program is approached, funded, and supported in slightly different ways. The following snapshots note where LSTA funds have likely supported a particular resource or platform to some extent, but they do not note what other funding or percentage of support this comprises, as this information is beyond the scope of the LSTA evaluation.

**State:** Massachusetts

### Project details/URLs:

- 2019: <https://imls-spr.imls.gov/Public/Details/83043>
- 2018: <https://imls-spr.imls.gov/Public/Details/81517>

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<sup>11</sup> The Institute of Museum and Library Services. 2021. Functions and Roles of State Libraries: 2000 and 2020. Washington, DC: The Institute of Museum and Library Services, p.14.; Results from the SDC E-Resources Survey.

<sup>12</sup> The Institute of Museum and Library Services. (2021). *The Use and Cost of Public Library Materials: Trends Before the COVID-19 Pandemic*. Washington, DC: The Institute, p. 6.

<sup>13</sup> The Institute of Museum and Library Services. 2021. Functions and Roles of State Libraries: 2000 and 2020. Washington, DC: The Institute of Museum and Library Services, p.14.; Results from the SDC E-Resources Survey, p.14.

<sup>14</sup> Results from the 2021 SDC E-Resources Survey

- In FFY 2018 & FFY 2019 \$2,098,982.67 was spent on database resources, consisting of 32.63% of total LSTA expenditures for Massachusetts.

### 1. Table of Resources:

*\*Databases in italics are only available to public libraries.*

Vendor/Provider	Resource	Vendor/Provider	Resource
Gale/Cengage	Academic OneFile	Gale/Cengage	Home Improvement (Gale OneFile)
Gale/Cengage	Academic OneFile Select	Gale/Cengage	Hospitality & Tourism (Gale OneFile)
Gale/Cengage	Biography (Gale in Context)	Gale/Cengage	Information Science (Gale OneFile)
Gale/Cengage	Elementary (Gale in Context)	Gale/Cengage	Insurance and Liability (Gale OneFile)
Gale/Cengage	Entrepreneurship (Gale Business)	Gale/Cengage	Military & Intelligence (Gale OneFile)
Gale/Cengage	Gale Presents: Peterson's Career Prep	Gale/Cengage	News (Gale OneFile)
Gale/Cengage	General OneFile	Gale/Cengage	Nursing and Allied Health (Gale OneFile)
Gale/Cengage	Global Issues (Gale in Context)	Gale/Cengage	Physical Therapy & Sports Medicine (Gale OneFile)
Gale/Cengage	Health and Wellness	Gale/Cengage	Pop Culture Studies (Gale OneFile)
Gale/Cengage	Literature Resource Center	Gale/Cengage	Popular Magazines (Gale OneFile)
Gale/Cengage	Middle School (Gale in Context)	Gale/Cengage	Psychology (Gale OneFile)
Gale/Cengage	New York Times, The	Gale/Cengage	Religion and Philosophy (Gale OneFile)
Gale/Cengage	Opposing Viewpoints (Gale In Context)	Gale/Cengage	Vocations and Careers (Gale OneFile)
Gale/Cengage	Power Search (Gale)	Gale/Cengage	War and Terrorism (Gale OneFile)
Gale/Cengage	Power Search - Publication Search (Gale)	Proquest	HeritageQuest
Gale/Cengage	Science (Gale In Context)	Proquest	Research Companion
Gale/Cengage	U.S. History (Gale In Context)	Proquest	Science Database
Gale/Cengage	World History (Gale In Context)	Proquest	The Boston Globe

Gale/Cengage	Agriculture (Gale OneFile)	Britannica	Britannica Fundamentals
Gale/Cengage	Business (Gale OneFile)	Britannica	Britannica Library Suite
Gale/Cengage	Communications and Mass Media (Gale OneFile)	Britannica	Britannica Library Young Adults
Gale/Cengage	Criminal Justice (Gale OneFile)	Britannica	Britannica Library: Children
Gale/Cengage	Culinary Arts (Gale OneFile)	Britannica	Britannica Library: Reference Center
Gale/Cengage	Diversity Studies (Gale OneFile)	Britannica	Elementary School Edition
Gale/Cengage	Economics and Theory (Gale OneFile)	Britannica	High School Edition
Gale/Cengage	Educator's Reference Complete (Gale OneFile)	Britannica	Middle School Edition
Gale/Cengage	Environmental Studies and Policy (Gale OneFile)	Britannica	Online School Edition
Gale/Cengage	Fine Arts (Gale OneFile)	Britannica	Spanish Edition: Elementary
Gale/Cengage	Gardening and Horticulture (Gale OneFile)	Britannica	Spanish Edition: Escolar
Gale/Cengage	Gender Studies (Gale OneFile)	Britannica	Spanish Edition: Middle
Gale/Cengage	Health and Medicine (Gale OneFile)	<i>Social Law Library</i>	<i>Social Law Library</i>
Gale/Cengage	High School Edition (Gale OneFile)		

## 2. Access/Scope/Population:

Statewide licensed database access is available for all Massachusetts residents (6.893 million in 2019), including Massachusetts Library System (MLS) member libraries, as well as campus-wide access for K-12 and academic institution members. LSTA funded databases are administered by the MLS. The database resources provide include a broad array of general, K-12, scholarly (undergraduate and graduate), and consumer, predominantly full-text information, including multimedia files. Content includes general periodicals, encyclopedias (especially appropriate for K-12) and other reference books, scholarly journals (academic level), biographies, and newspapers, as well as content in the following subject areas: consumer health, nursing and allied health, literature, biography, literary criticism and readers' advisory, and science and technology. The K-12 user population relies most heavily on LSTA funded databases, and in many schools these databases represent the library's core collection. These

databases have been critical during periods of remote learning. There is less database use by academic and public libraries, however they provide consistent feedback that these resources are important to their users. In FY 20, as a result of additional state funding, 5 new database products were added, including: Gale in Context: Opposing Viewpoints (Gale Cengage), Career Transitions (Gale Cengage), HeritageQuest (ProQuest), Research Companion (ProQuest), and Science Online (ProQuest). The new databases went live in January 2020. There was a sharp decline in usage during the pandemic, as detailed in the activity report of the LSTA project summaries and publicly available online usage statistics. When the Commonwealth of Massachusetts shut down all in-person schools and many workplaces due to the COVID-19 pandemic the Massachusetts Board of Library Commissioners (MBLC), along with the Massachusetts Library System (MLS), worked with vendors to allow access to temporarily free resources and helped troubleshoot authentication issues. The first line of database support has been provided (since 2016) by the MLS, but the MBLC provides assistance with promotional materials and complex authentication issues. Users can login via their library (public or school) or via geo authentication if located in Massachusetts. There is one database that is only available to public libraries, the Social Law Library.

### **3. URLs :**

Massachusetts-DBs spreadsheet constructed.

### **4. URLs usage :**

Usage information in the aggregate for the major vendors licensed by MLS is available publicly online: <https://guides.masslibsystem.org/databases/statistics>. The tableau platform is used to facilitate ease of access to the overall statewide usage patterns, see 2019 here: <https://guides.masslibsystem.org/databases/statisticsFY2019>. Proquest Research is not reported with these statistics, but Proquest will provide statistics upon request: [support@proquest.com](mailto:support@proquest.com)