

**EVALUATION
OF THE
LIBRARY SERVICES & TECHNOLOGY ACT
PLAN FOR IMPLEMENTATION
IN
NORTH CAROLINA**

**AUGUST 1997
Revised February 1999
Revised January 2000**

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SEPTEMBER 2001

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EVALUATION CONSULTANTS' FOREWORD

Stakeholder Involvement

It is traditional to evaluate projects in terms of a comparison of intentions and achievements—to address such questions as

- the degree of clarity of the intentions,
- the degree to which achievements matched the intentions, and
- the degree to which intentions are yet to be achieved.

Often, an outside evaluator is brought in to conduct an “audit” of the situation and to provide a report that addresses these questions. While producing responses to these questions is important, increasingly it is understood that without attention to the process of planning and evaluation, by the persons who will carry out the plan, evaluation reports are of severely limited value. Persons who have not been involved in the evaluation process are less likely to understand, accept, or be able to make use of evaluation reports. Involvement in the evaluation process will make it more likely that evaluation will be integrated with the next planning process (making subsequent evaluation easier) and that it will be kept in mind as activities are being carried out or modified.

This evaluation is marked by a beneficial attention to the process of planning and evaluation by those who have a stake in the plan. Indeed, the LSTA Plan for Implementation in North Carolina was developed over a period of years by involving stakeholder groups in a variety of ways. Two state committees, the LSTA Advisory Committee, composed of leaders from the state’s library community, and the State Library Commission, made up of fifteen North Carolina citizens and professional librarians, brought stakeholder interests and a statewide perspective to the planning process. A Discussion Paper that outlined the proposed approach, principles, and priorities for implementing LSTA in North Carolina was prepared collaboratively with these committees and was the basis of a series of five meetings with 182 librarians across the state. The resulting Plan was reviewed again by stakeholder representatives before submission to the Institute for Museum and Library Services. Subsequent focused collaborative planning efforts on interlibrary cooperation and on youth services resulted in modifications to the LSTA Plan.

Evaluation Questions

Throughout, the LSTA planning process in North Carolina was characterized by data gathering and broad involvement of the library community. Similarly, this evaluation has focused on the method by which evaluation data has been gathered and processed.

An essential question was:

- *How the State Library can make sure that they perform evaluation in an on-going way. Determine what tools, formats, work forms are needed and how to continuously improve the planning/evaluation processes.*

Therefore, the evaluation design involved key State Library of North Carolina staff in the assessment of the achievement of the Plan's objectives. It is expected that their active involvement in evaluation of objectives will enable the writing of even clearer and more readily evaluated objectives in the next plan.

A second evaluation question was:

- *How North Carolina librarians evaluate the success of the current LSTA plan, what gaps they would identify in services, and what priorities they would select for LSTA support over the next 3-5 years.*

Throughout the process, librarians in North Carolina have had broad involvement in the design and conduct of this evaluation. The approach and design for the evaluation was reviewed by the LSTA Advisory Committee in November, 2000. The perceptions of North Carolina librarians were obtained at a series of five structured meetings held across the state and are reported in the following pages. SLNC staff were active in the design and conduct of these meetings.

Therefore, the LSTA Evaluation Report is a product of the efforts and judgments of librarians in North Carolina

- ❖ who have had generous opportunities to participate in the formation of the Plan,
- ❖ who have lent their perceptions to the evaluation, and
- ❖ who have an increased sense of how planning and evaluation form a cycle of evolving performance.

While the Evaluation Report is designed to represent the observations, perspectives, and judgments of librarians in North Carolina, this Foreword is an appropriate place for observations of the evaluation consultant.

A third evaluation question was:

- *How successful North Carolina's LSTA plan and its implementation have been in facilitating progress in meeting the needs that have been identified in the ongoing planning activities?*

This question is addressed in the evaluation reports prepared for each of the objectives in the LSTA Plan and includes the regional meeting results and reports by State Library staff. These reports can be found in Part III (Supporting Materials). A more succinct presentation is in the Summary Reports at the front of the Evaluation Report.

A fourth evaluation question was:

- *How successful the State Library has been in moving from the LSCA program, which focused on public libraries, to a multi-type library program for all types of libraries that was also designed to support activities that were formerly funded by Higher Education Act grants for academic libraries.*

There is ample evidence of on-going efforts to involve all types of libraries in the LSTA program. Regional meetings for the development of the LSTA plan in 1997 and for its evaluation in 2001 have been attended by representatives of all types of libraries, with special libraries being the least represented. Representatives from all types of libraries were involved in the development of state plans to serve youth (Powerful Partners) and foster library cooperation (Building Communities). Components of these plans were incorporated into the LSTA plan. LSTA programs, such as Powerful Partners and The Very Best Place to Start, have been designed to bring librarians from different types of libraries together to jointly plan and provide services. Special attention has been paid to the needs for workstations in academic libraries and for up-to-date collections in school library media centers. Representatives from different types of library are members of the LSTA Advisory Committee and the State Library Commission. While it is clear that LSTA planners in North Carolina are deliberate in their consideration of the needs of all types of libraries, progress is slowed somewhat as librarians in other than public libraries are not accustomed to looking to the State Library as a source of support. The state library community also needs to adjust to the fact that although the amount of money overall for LSTA did not change in the shift from LSCA to LSTA, the number of eligible libraries increased significantly—from 75 public libraries to the addition of 111 academic libraries, 2100 school library media centers, and special libraries that meet the definition.

The final evaluation question was:

- *How successful have been the efforts of the last three years to promote conversation and collaboration across types of libraries?*

The LSTA program has been the occasion for a marked increase in opportunities for librarians from diverse types of libraries to jointly plan and evaluate. Comments from each of these meetings have expressed appreciation for what was learned through these conversations and requests for more such occasions. The Powerful Partners projects promote formal collaborative activities. While it can be inferred that the degree of collaboration across types of libraries has been fostered by the LSTA program, a study would be required to determine whether a measurable increase in collaborative activity has occurred.

Guiding Principles

A set of “Guiding Principles for LSTA in North Carolina” emerged during the 1997 LSTA planning process to provide a philosophy to guide the ongoing planning, policy development, and implementation of LSTA in the state by:

- ❖ serving as a consistent guide for decision-making;
- ❖ helping communicate plans and decisions to customers and stakeholders.

At the time of this evaluation, evidence of adherence to these principles from 1997 can be found in the activities and accomplishments of the North Carolina LSTA program.

- ***Vision Driven***

The state's LSTA program will be guided by a statewide vision for the future of libraries in North Carolina. Decisions will be based on the desired future of library services in the state, with the federal program focused on achieving that vision.

The North Carolina LSTA Plan reflected the merging of two visions:

- ✓ the vision behind the LSTA legislation and
- ✓ the vision of quality library service for the residents of the State.

The *vision behind the LSTA legislation* saw the need for the enhancement of access to electronic resources, the need for different types of libraries to act in concert to provide services to residents, the need to address library services to those lacking quality services, and the need for accountability for the use of Federal funds. The *vision of quality library services for the residents of North Carolina* was developed collaboratively with involvement of librarians from the range of library types and based on data collected from and about the citizens of the state. Each of the four goals of the Plan had a “Vision for Success” that provided focus for the selection of objectives and activities:

North Carolina LSTA Goal #1: Enabling All Libraries to Serve as Gateways to Information

Vision for Success: Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond.

North Carolina LSTA Goal #2: Achieving Equity in Public Library Service

Vision for Success: Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide.

North Carolina LSTA Goal #3: Libraries as Leaders for Children and Teens

Vision for Success: With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.

North Carolina LSTA Goal #4: The State Library as a Leader in Library and Information Services

Vision for Success: The State Library serves as a model and a leader in the development and delivery of library and information services.

These vision statements are consistent with the intentions of the LSTA legislation and were instrumental in keeping the North Carolina LSTA program focused.

- ***A Balance of Priorities***

For the implementation of LSTA in North Carolina, the priorities outlined in the federal legislation are interpreted in the following way to respond to North Carolina's needs:

- *Providing equal access to library and information resources for North Carolinians through cooperation, collaboration, and technology and*
- *Enabling libraries to achieve equity in serving their communities.*
- *North Carolina's LSTA program will balance these two priorities.*

North Carolina has promoted equal access to resources by carrying out grant programs that ensure that citizens across the state can gain access to the Internet through their public and academic libraries, through the Powerful Partners collaboration program, and through the information technology programs of NC LIVE, NC ECHO, and FIND NC.

The Powerful Partners collaboration program has also worked to achieve equity in serving communities, as have the programs to advance services to the Hispanic community and to young adults. In addition, equity has been supported through Basic Equipment Grants, Enhanced Connectivity Grants, and Technology Planning Grants.

- ***Fostering Innovation and Equity***

LSTA funds in North Carolina will have a dual focus. One is an emphasis on enabling innovation and change through the funding of "leading edge" projects, supported through innovation grants and statewide leadership grants. A second overall intent is to fund "trailing edge" projects that improve the overall level of library service statewide by enabling participating libraries to achieve equity. The State Library believes that the LSTA program can result in positive, focused change if the program consciously manages the issues of equity and innovation.

North Carolina supported a variety of LSTA projects that maintained this dual focus. Leading edge programs are illustrated by the NC ECHO program to make unique cultural resources available online and The Very Best Place to Start program using advanced public relations approaches to promote library services. Examples of trailing edge projects are the Basic Equipment Grants and Enhanced Connectivity Grants to bring libraries up to the standard for numbers of user workstations and to improve the level and quality of user access to Internet resources.

- ***A Coordinated Approach***

Key LSTA program objectives will be coordinated with the State Library of North Carolina's mission and goals to foster positive development of statewide and local library and information services.

The stated goals of the State Library are:

- *To develop and extend public library service for North Carolinians in partnership with local communities.*
- *To coordinate and support statewide library network activities to assure equity of access to library and information resources for all North Carolinians.*
- *To provide library and information resources for North Carolinians to promote knowledge, education and business.*

The LSTA program had been designed to be compatible with State Library initiatives. While State Library funds were used to provide NC LIVE services, LSTA funds enabled training of librarians in uses of NC LIVE. NC ECHO direction is provided by State Library staff, and LSTA funds have been used to hire other staff for the program. Several of the objectives of the LSTA Plan were achieved without expending LSTA funds.

State statutes direct the State Library to coordinate activities among all types of libraries, and LSTA statewide grant programs have fostered that collaboration. Overall, the approach has been to conduct participatory planning for the state, and then to decide what initiatives are best funded using LSTA funds.

- ***Build Cooperation and Collaboration***

The priorities and the process for LSTA implementation must build a strong infrastructure of understanding, shared goals, and healthy working relationships among all types of libraries.

Inclusion of bibliographic and holdings information from all types of libraries in North Carolina's Union Catalog has laid the foundation for a broad-based resources sharing program. The Powerful Partners program has provided a structure for collaboration among types of libraries. State Library-initiated meetings, such as the regional meetings for this evaluation, have deliberately involved representatives from many library types. Library staff members in all types of libraries are eligible to attend various state sponsored training workshops.

- ***Focus Federal Funding***

Both LSTA requirements and findings during the planning process indicate that federal funds must (1) leverage local dollars and (2) create incentives for the continuous improvement of library services statewide.

The State Library has attempted to use federal funding to accomplish maximum change at a time when LSTA dollars remained constant and the number of eligible libraries increased significantly. An example is using the school library collection development grant program to draw attention to the poor condition of collections across the state and to leverage local resources with the requirement for matching funds. Other examples are using statewide leadership grants to kick off major initiatives such as NC ECHO to make accessible unique resources from across the state and The Very Best Place to Start to pilot a state-wide public relations campaign. Further, the

State Library has been frugal in the use of LSTA funds. Several of the objectives were accomplished without the expenditure of LSTA funds and the costs for the administration of LSTA were kept to 2.5% of the overall grant funds.

“To Do” List

Finally, conduct of this evaluation results in the beginning of a “To Do” list for the next LSTA plan:

Public Relations Campaign

During LSTA planning North Carolina librarians cited the need to create a greater appreciation and understanding of the value of libraries through improved communication. In response, planners for the North Carolina LSTA program took the strategy of using LSTA resources:

- to conduct market research,
- to employ a highly qualified public relations firm to design a professional campaign,
- to train librarians in interacting with the media, and
- to engage local librarians in implementing the campaign in their communities and in their libraries.

As a pilot project for a much more comprehensive campaign for libraries of all types, this initial campaign focused on library services for children and teens. The campaign launch involved 1,400 public library outlets and school library media centers. The success of the campaign launch is now tempered by the perception of some that the expenditure was excessive when compared with local library needs and the complaints of some others that they were not able to benefit from this campaign because of not being informed or of scheduling conflicts. Still others questioned the campaign’s focus and methods. Decisions are needed now about how to maintain the momentum of the campaign, how to facilitate its use by all libraries serving youth, how to communicate its cost/benefit to the library community, and how to make use of the lessons of this impressive pilot to address the original requests for assistance with public relations.

Planning and Evaluation

During the LSTA planning process, North Carolina librarians recognized that a greater appreciation and understanding of the value of libraries would also flow from improved planning and evaluation. This recognition mirrors an increased emphasis on accountability at the federal level where Congressional leaders are demanding that the Institute of Museum and Library Services develop a strategic plan with performance measures that demonstrate the impact of money appropriated for library services. Much development of planning skills and activities is evidenced throughout North Carolina’s LSTA Plan and its evaluation:

- the involvement of the library community in assessing needs, determining plans, and evaluating results;

- specialized planning efforts on information technology and services for youth;
- active participation of State Library staff in the LSTA evaluation.

There are, in addition, aspects of planning and evaluation that could usefully be addressed:

The objectives in the LSTA and other plans need to be improved by becoming:

- More ends-oriented (i.e., not describing activities)
- More measurable (While many of the LSTA Plan's objectives have benchmarks—to describe current conditions—and outcome measures—to project desired points of achievement, State Library staff have experienced the difficulty of evaluating objectives that do not have clear indicators of success.)
- Linked to dates for achievement, so that the timing for evaluation is clear.

The plans submitted by public library systems in order to qualify for state aid exhibit a broad range of quality, indicating that, for a substantial proportion of systems, planning is not a productive activity, but one largely pursued to comply with an external requirement. There are also public library system plans (some produced as a result of LSTA grants) that could serve as models for others of how thoughtful and skilled planning can result in more focused and effective library services.

The State Library has an objective (4.3) that urges leadership in evaluation, assessment, and measurement of library effectiveness. There has been some involvement by State Library staff in the measures developed for determining effectiveness of electronic library services, but increased attention will be required in order for the libraries in the state to gain from these initial efforts. Finally, at the same time that the new LSTA plan is being constructed, a plan for the collection of data and the evaluation of the plan's objectives should accompany that document. This is urged because linking the planning and evaluation efforts will result in the writing of objectives that are better able to be evaluated and because personnel often change from the time of planning to the time of evaluation. Including the design for the evaluation with the plan will ease the task of evaluation and make it more likely that the evaluation will match the intent of the objectives.

Studies of Conditions

A number of the objectives in the LSTA plan resulted from findings of earlier studies, for example:

- the state of automation in academic libraries
- the degree to which libraries' records are available in machine-readable form
- the competence of staff to integrate the use of technology into the delivery of library services
- the degree to which public library plans address services for youth and to which Local Education Agencies have long-range plans for library media services

It is difficult to determine whether LSTA activities have affected these conditions without repeated investigations. Since it may be too early to look for desired changes, thought needs to be given to a plan and schedule for these follow-up studies.

Expansion of Leveraging Strategy

Observations of the grant program and from the Regional Meetings indicate the School Library Collection Development program to be very successful, and a key element in its success is the requirement for a \$1 to \$1 match. This has, of course, doubled the funds available for school library collection improvement, but it has also alerted the school districts and communities to the inadequate state of the school library collections and has marshaled sources of local support to address the problem. (There were some school librarians at Regional Meetings who said that the matching requirement was a barrier to their applying for the grant, but consultation from State Library staff may assist those librarians in locating the needed funds.)

The mechanism of matching fund requirements could be considered for other grant areas, such as local planning, upgrades of equipment, or training. Again, the mechanism not only allows broader use of funds, it also ensures local commitment to the project activity and promotes continuity of funding.

On-going Consideration of Equipment for Technology

The current LSTA Plan has contributed to impressive improvement in the technological infrastructure to support access to electronic sources of information. Now that almost all of the state's public and academic libraries have reached a basic level of adequacy, continuing attention will need to be given to the minimal levels represented in the current standards and to the on-going need to upgrade equipment.

Continue Focus on Users

At Regional Meetings, librarians were asked to distinguish between the differences LSTA funds had made for their libraries and the differences they had made for their users. In addition, they were asked, when suggesting needs and priorities for the next LSTA plan, to state what the impact of such proposed activity would be for users. Librarians were able, with some difficulty, to articulate how library programs and services affected users (most powerfully in stories of individual incidents. One librarian in frustration said, "But everything we do is for the user!") The importance of being able to express how library services contribute to user well being is difficult to over-estimate, and librarians are encouraged to continue their efforts in articulating user benefits.

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PART I: INTRODUCTION AND OVERVIEW

The Library Services and Technology Act (LSTA) requires that a state library agency evaluate the progress it has made in implementing its LSTA plan by the end of the first five years of the act, which was signed into law on September 30, 1996. The State Library of North Carolina initiated its planning for the evaluation in the fall of 2000, in order to serve as one of a small number of states conducting a Fast Track evaluation.

This evaluation was guided by five evaluation questions:

- *How successful North Carolina's LSTA plan and its implementation have been in facilitating progress in meeting the needs that have been identified in the ongoing planning activities.*
- *How successful the State Library has been in moving from the LSCA program, which focused on public libraries, to a multi-type library program for all types of libraries that was also designed to support activities that were formerly funded by Higher Education Act grants for academic libraries. The State Library has tried to involve all types of libraries in a continuing planning/evaluation loop, using an incremental approach to widen the scope of libraries involved.*
- *How successful have been the efforts of the last three years to promote conversation and collaboration across types of libraries, the numbers and qualities of collaborative relationships that have been developed.*
- *How North Carolina librarians evaluate the success of the current LSTA plan, what gaps they would identify in services, and what priorities they would select for LSTA support over the next 3-5 years.*
- *How the State Library can make sure that they perform evaluation in an on-going way. Determine what tools, formats, work forms are needed and how to continuously improve the planning/evaluation processes.*

Two evaluation designs were used to address the evaluation questions. The first collected information needed to address the first evaluation question, *How successful North Carolina's LSTA plan and its implementation have been in facilitating progress in meeting the needs that have been identified in the ongoing planning activities.* This information is closely related to the objectives in the LSTA Plan, and State Library staff members, who are best informed about these activities, were instructed in a method for reporting this information. Specifically, the evaluation consultant met with each staff member involved and provided instruction in the use of

the following template for preparing an “evaluation report” for each objective in the LSTA Plan. (The template used can be found in Part IV, Appendix A.)

The consultant reviewed the evaluation reports provided by the staff members and met with each to clarify questions. In Part III – B (Supporting Materials: Staff Evaluation Reports for Individual Objectives), the staff member responsible is identified as the “Evaluation Reporter” for each of these individual, objective-centered reports.

A second evaluation design was used to obtain reflections of the library community about the achievements of the LSTA Plan and about the State’s strategy for use of LSTA funds in order to address the next three evaluation questions:

- *How successful the State Library has been in moving from the LSCA program, which focused on public libraries, to a multi-type library program for all types of libraries that was also designed to support activities that were formerly funded by Higher Education Act grants for academic libraries. The State Library has tried to involve all types of libraries in a continuing planning/evaluation loop, using an incremental approach to widen the scope of libraries involved.*
- *How successful have been the efforts of the last three years to promote conversation and collaboration across types of libraries, the numbers and qualities of collaborative relationships that have been developed.*
- *How North Carolina librarians evaluate the success of the current LSTA plan, what gaps they would identify in services, and what priorities they would select for LSTA support over the next 3-5 years.*

Five regional meetings were held across the state in April of 2001 (in Fayetteville, Mocksville, Waynesville, Washington, and Raleigh). These meetings were attended by 118 members of the library community; about half of those attending were from public libraries with the other half coming from school and academic libraries. Almost all of those attending had received an LSTA grant, but there were also school librarians attending who had not received a grant and who were interested in this grant program, new to them, that was available through the State Library.

The pattern of the meetings was fairly uniform, although modifications were made as the series of meetings progressed. The opening of each meeting was a presentation by the State Library’s Federal Programs Consultant on the purposes of the North Carolina LSTA program and of the Goals, Objectives, and Accomplishments of the current Plan. Because we wanted an informed evaluation of the LSTA program, this information had also been provided in writing to each participant in a Background Paper. Then groups, mixed by library type, were asked to list under each of the four Goal areas, the differences the LSTA program had made for their library and for their users. After the differences LSTA had made for libraries and for users had been listed under

each goal, participants were asked to place five colored dots by those differences **for users** that they considered most important.

We then asked those attending to write a story that illustrated the difference some part of the LSTA program had made. Some of these stories are reported in this document with the Summary Report for the related goal.

The evaluation was taking an in-depth look at two aspects of the LSTA program:

- providing Internet access to the public through libraries and
- enhancing services to children and young adults.

Participants were asked to consider each of these emphases and to provide an assessment of what worked well in that aspect of the program and of what could be changed to make it more effective. The results of their reflections are included in reports on these two program emphases following the Summary Reports on the LSTA plan goals.

In a final work session, participants were asked to suggest needs and priorities to be addressed in the next North Carolina LSTA plan and for each suggestion, what difference that would make for users. This last session specifically addressed the evaluation question: *How North Carolina librarians evaluate the success of the current LSTA plan, what gaps they would identify in services, and what priorities they would select for LSTA support over the next 3-5 years.*

At the end of the meeting, participants handed in a one-page evaluation sheet that asked about the LSTA program as well as whether the meeting has increased their understanding of the LSTA program in North Carolina. A copy of the form used is in Part IV – B (Appendices: Evaluation Form Used at Regional Meetings). Of the 118 participants, 115 completed evaluations, a 97% response rate. In response to the question: “To what extent has this meeting **increased your understanding** of LSTA programs in North Carolina over the last three years?,” participant scores had a mean of 4.3 on a scale of 1 – 5. Some lower scores were explained by participants saying that they already had an understanding of the program, so the meeting had not greatly increased that understanding.

To the question, “To what extent would you agree that North Carolina’s **LSTA programs have made a difference** for libraries and users?” participants gave a mean response of 4.5 indicating strong agreement.

To the question, “To what extent would you agree that **progress has been made in achieving the Goals** set out in the five-year plan?,” participants gave a mean response of 4.3, again indicating strong agreement.

The next two questions were prefaced with, “Based on your experience with LSTA over the last 3 years, as well as your participation in today's meeting...” Then the first question asked, “To what extent do you feel that the State Library has been **successful in involving all types of libraries** in the continuing planning & decision making about LSTA?,” to which participants gave a mean score of 3.8. The second question asked, “How successful have the State Library’s efforts been over the last three years in **promoting conversation and collaboration** across types of library?,” to which participants gave a mean score of 3.7. For both of these questions, participants acknowledged considerable success while noting that there was still room for progress.

The evaluation form also solicited questions about the LSTA program and general comments on the program or the meeting. Participants’ responses can be found in Part III – A (Supporting Materials: Questions and Comments from Regional Meetings).

PART II: SUMMARY REPORTS

Summary Report for North Carolina LSTA Goal #1: **Enabling All Libraries to Serve as Gateways to Information**

Vision for Success: Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond.

Introduction

The Vision for Success for Goal 1 led to the conception of a statewide network of libraries based on cooperation, collaboration, and technology. If North Carolina users are to have access “to the full range of electronic and print resources available in North Carolina and beyond,” then libraries will have to perform cooperatively, will need to collaborate, and will need to have the technological capacity. Planning for this conception is described in Objective 1.1 and was completed by June of 1999. The remaining objectives of this goal address critical aspects of this statewide network: technological adequacy, staff competency, electronic records, enhanced access to specialized resources, and a program of advocacy to communicate this vision to the residents of the state. Progress toward this goal of enabling all libraries to serve as gateways of information can be seen for each of these aspects.

A listing of the objectives for Goal 1 follows with a note of the degree of accomplishment (*in italics*) for each. See “Staff Evaluation Reports for Individual Objectives” in the Supporting Materials (Part III – B) for detailed reports on the activities carried out for each objective and its evaluation.

Goal #1 Objectives

Objective 1.1: Complete the plan for a statewide network of libraries based on cooperation, collaboration, and technology to support information access through all types of libraries.
Objective completed.

Objective 1.2: Libraries have the physical infrastructure to enable them to provide access to networked information for their users. *All community college libraries have Internet access for students. Significant increase in public library and college library capacity.*

Objective 1.3: Libraries have an automated system that meets the minimum standards. *Almost all NC LIVE libraries now have integrated automated systems; the number of those systems actually meeting the minimum standards is not known with certainty. Almost all*

public libraries and community college libraries can be assumed to have core collection's bibliographic records in machine-readable form. The state of other academic library collections is not known at this time.

Objective 1.4: Library staff members in all types of libraries have the needed skills, knowledge, and abilities to integrate the use of technology into the delivery of library services. *While extensive training has been conducted, the desired level of competency has not been stipulated and the degree to which staff possess skills, knowledge, and abilities has not been determined.*

Objective 1.5: All libraries have accurate, complete bibliographic and holdings information in the North Carolina Union Catalog, a subset of OCLC's WorldCat. *Modest progress has been made. Further study and effort are needed to accomplish this objective.*

Objective 1.6: Develop and implement a plan for making unique North Carolina resources accessible to North Carolina residents and to scholars and researchers throughout the world. *This objective has been accomplished, and rapid progress is being made in making unique North Carolina resources accessible.*

Objective 1.7: Libraries have an effective statewide program of marketing and communications to inform the public about the role that libraries play in providing access to networked information. *A pilot project has been conducted that can lead to the accomplishment of this objective.*

Significant attention was given to ensuring public access to the Internet in libraries, with LSTA funds contributing to rapid change (Objective 1.2). Seventy-seven grants for up-to-date workstations were awarded to public libraries for \$655,100; 48 were awarded to community college libraries for \$436,799; and 16 were awarded to academic libraries for \$130,692. In addition, a grant program to support improved networking and bandwidth as well as equipment for staff and user training enhanced libraries' capacity for quality access to electronic resources. In this reporting period, 30 grants were awarded to public libraries for \$1,068,660; 5 grants to community college libraries for \$144,219; and 3 grants to academic libraries for \$124,611.

The number of public library outlets offering Internet access to the public (93% of all outlets) increased by 256% from July 1997 to January 2000. The number of public library systems meeting a standard of one public access workstation per 5,000 legal service population (58% of all systems) increased 2,200%! Progress was more modest in community college libraries as Internet access was generally available in 1999, but data available from other academic libraries showed a 400% increase in the number of academic libraries meeting a standard of one public access workstation per 100 full-time equivalent student population.

A combination of grants to support automation planning and purchase of integrated library management systems (Objective 1.3) allowed public library systems to progress from less than half having systems that met modest standards of functionality to all but one of the 76 public library systems having an integrated automated system. In addition, an automation planning grant and four automated systems grants resulted in all but one of the 111 independent academic libraries having an integrated system that meets standards.

In order to allow a functional network of libraries, retrospective conversion grants supported making libraries' core collections' bibliographical records available in machine-readable form. Because the degree to which the records for library collections can only be inferred, further study is needed to directly determine how much more effort is required to make the network fully participatory.

Objective 1.5 addressed the need to make those records that are machine readable available in the North Carolina Union Catalog. From 1998 to the end of 2000, the percentage of North Carolina libraries that either used OCLC for ongoing cataloguing or had batchloaded holdings into OCLC had more than doubled, from 31% to 77%. As expected, the increase of monograph records in the Union Catalog has resulted in an increase in lending from these libraries. However, the percentage of libraries with their holdings in the Online Union List of Serials has not changed.

In addition to sharing information on conventional holdings in libraries, the LSTA plan called for identifying and making available the North Carolina resources that were unique and found in museums, archives, and other important special collections (Objective 1.6). As of the end of 2000, a well-formed plan was in the process of being implemented, approximately 633 cultural repositories had been identified in the state (the first time such a compilation had been created), guidelines for the digitization of resources were prepared, and a project web-site was in operation.

A coordinated program of training increased staff's ability to make use of the new technologies and electronic resources. In Objective 1.4, the LSTA plan proposed the development of a competency model that would describe the knowledge, skills, and abilities that library staff would require in order to make use of technology. While this model is yet to be developed, an active program of workshops reached almost 2,500 staff from public and academic libraries through 154 workshops. In addition, a Master Trainer Program has prepared 34 librarians from different types of libraries to be able to provide technology training that meets local needs. This activity has addressed the evident need for staff training, however a systematic study would be required to determine the existing needs for technology training in public, academic, and school libraries.

A public communications initiative accompanied the efforts to improve technology, staff competence, and knowledge of the existence of resources (Objective 1.7). If the improved services were to be effective, the public would need to be aware of them and would need to see them as desirable for the state. While this initiative is seen as critical to the goal of all libraries

serving as gateways to information, pursuit of the full plan for public communications was delayed in order to take advantage of the lessons emerging from a state-wide marketing and communications campaign focused on services for youth (described at Goal #3).

At Regional Meetings, participants identified projects that focused LSTA dollars on using technology to deliver information services to users as making a significant difference to libraries and their users. [These observations reflect the predominant comments of Regional Meeting participants; see Part III – C (Tabulation of Differences LSTA Made for Libraries and for Users) for a full listing.] LSTA dollars enabled libraries to purchase more and better computers, to install automated library systems, and to enhance connectivity in their libraries. These grants gave patrons more ready access to a broader, deeper pool of electronic resources and to the resources of other libraries in the area and around the state. “Everyone has access to more material.” “There’s better and faster service and access.” For some libraries the money enabled them, for the first time, to use technology and demonstrate its benefits to their communities. For other libraries, the money provided for more workstations, better connections, and the ability to respond to increased patron demand. “Patrons are getting the information and help they need in the same speedy/efficient way that folks elsewhere have been doing for some time. So patrons are happy to get what they want and are happy/proud of their library for providing it.” Libraries gained greater visibility and recognition in their communities by offering access to developing information technology along with opportunities to learn how best to use it.

Participants also valued NC LIVE training, the Master Trainer Program and technology workshops that developed their staff’s knowledge and skills. For patrons this meant better service from a staff that was proficient in searching the Internet and using various electronic resources. This was said by many participants to be a major benefit of LSTA funds.

The following stories describing the contributions of activities related to North Carolina LSTA Goal #1 were collected from participants at Regional Meetings.

Stories Related to North Carolina LSTA Goal #1: Enabling All Libraries to Serve as Gateways to Information

- *A community college librarian on a Basic Equipment Grant:*
Our library had 7 computers (4 very out of date). Students had to stand in line to get access to our electronic catalog and when trying to use the Internet the computers would lock up and freeze. Trying to teach classes was very difficult with 3 to 4 to a computer and when they froze it was 6-8 to a computer. Our first LSTA grant got us 7 new computers and 2 printers. We threw out 3 old ones to end up with 10. This gave students better access to more computers. And classes then had 2 students to a computer that worked. Our second LSTA grant allowed us to get 3 computers put in our library at a branch (Davie County Campus). They didn’t have any computers before these 3. They now have

access to our catalog and remote resources. All of this led to the college's interest. We now have the open lab located in our library with 40 state of the art computers. (We are getting 10 more this summer). With these resources our students have access to resources from 7:45 a.m. to 9:30 p.m. during the week and 9-2 on Saturdays. They never have to wait. We are able to give more classes with 1 student per computer for total hands-on learning. The community patrons are also able to use these computers.

- *A community college librarian on a Basic Equipment Grant:*

The biggest help that the LSTA grants have been for Mayland Community College is the “jumpstart” that it has provided our library. In addition to providing us workstations, networking capability and connecting in general it has allowed for the situation where our college is able to update and replace the pieces of the puzzle. We would not have been able to get everything in the first place, let alone replacement, if it had not been for the ease of Basic Equipment Grants. Now the system is in place to keep these valuable resources because we have had an opportunity to demonstrate the impact of having electronic resources available in the college library environment.

- *A public librarian on collaboration:*

Our Master Trainer also assists as a volunteer in the local community college’s English as a Second Language class. Three of her students at the college heard that the ELLIS ESL software was being installed on one of the computers added to our public Internet access center through the LSTA Basic Equipment Grant on a specific day. That very day, almost at the moment the installation was completed, the three ESL students showed up at the library anxious to use the new ELLIS software. Our Master Trainer gave the three the ELLIS test screening immediately so could get started that very day using the ELLIS software to improve their English language skills. She then turned them loose and they spent the next two hours helping each other work through the program. Since that day they have all been assigned tutors, and all three are in training to use the program to improve their English. Because of the community response to ELLIS, our Master Trainer has chosen training community volunteers in how to tutor as ELLIS tutors as her Master Trainer project in the community.

- *A public librarian on the Master Trainer Program:*

The Master Trainer Program has enabled our region to have a staff with skills to assist patrons in using the NC LIVE databases. The NC LIVE training, while good, was limited. Our staff really needed lots of follow-up in order to be proficient with these wonderful resources. Jeri Oltman received the Master Trainer training, and has presented 8 short training sessions for all of our paraprofessional staff. With the skills she learned during the Master Trainer training. Those staff members had fun and improved their proficiency so that they now are more effective and eager to help patrons meet their information needs.

- *An academic librarian on LSTA program for making unique North Carolina resources accessible:*

This is a personal story. It's about how FIND NC and NC ECHO helps me do my job. I do collection development for NC Collection and because of that I'm always on the lookout for books, pamphlets, reports, etc. about not just the state as a whole but also about localities, individuals, local institutions, and the like. I might find out about a publication from a newspaper article, hear it mentioned on TV or radio, or someone might stop by to tell me about it. It's rare that these sources have the full author, title, publisher, information, or an address or phone number for the publisher. FIND NC and NC ECHO are invaluable for finding contact information for the museums, libraries state offices, local historical societies, and genealogical groups that are so often the publishers of the obscure, but valuable publications that I'm trying to acquire for my collection.

Summary Report for North Carolina LSTA Goal #2: Achieving Equity in Public Library Service

Vision for Success: Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide.

Introduction

The Vision for Success for Goal 2 focused on public library service and resulted in three areas of emphasis:

- (1) assisting public libraries in acquiring and using information technologies,
- (2) assisting public libraries in the planning and evaluation of library services, and
- (3) developing public library services for North Carolina's growing Hispanic population.

While identifying these key areas of emphasis for achieving equity in public library service the *LSTA Plan for North Carolina* recognized that success was dependent on increased support for library services at the state and local level. "Federal funds alone cannot create that equity. The challenge for the State Library and local library leaders is to find ways to use the benefits of federal funds to leverage state and local funds to support improved services."

Goal #2 Objectives

Objective 2.1: All 75 public library systems have an automated system that meets minimum standards. *All but one public library system have automated systems that meet minimum standards.*

Objective 2.2: Every public library outlet in North Carolina provides adequate public access to the Internet. *Reported on at Objective 1.2.*

Objective 2.3: Public libraries provide appropriate services and resources for North Carolina's rapidly increasing Hispanic community. *Considerable progress has been made in developing a plan for the provision of services and resources for the Hispanic community. Workshops prepared library staff to obtain funds for needs assessments in twelve public libraries.*

Objective 2.4: Public library managers have the resources and skills they need to plan and evaluate library services. *All public library systems have current plans of varying quality on file with the State Library of North Carolina. Ten public library systems have engaged in extensive planning efforts funded with LSTA grants. Technology planning and performance measurement require further attention.*

Objective 2.1 focused on infrastructure development and the integration of technology into public library service. This objective is also reflected in Goal #1, "enabling all libraries to serve as

gateways to information.” A combination of grants to support automation planning (22) and purchase of integrated library management systems (12) allowed public library systems to progress from less than half having systems that met modest standards of functionality to all but one of the 76 public library systems having an integrated automated system. Eight retrospective conversion grants supported making libraries’ core collections’ bibliographical records available in machine-readable form.

The rapid growth of North Carolina’s Hispanic population and the fact that few North Carolina public libraries have undertaken the development of comprehensive programs of service targeted specifically toward Hispanics motivated the state’s focus on providing appropriate services and resources for the Hispanic community (Objective 2.3). An Hispanic Services Advisory Committee provided guidance in the development of continuing education workshops and in the design of a mini-grant program. As of December, 2000, 88 library staff members representing 51 libraries attended workshops offered around the state. Twelve grant applications were awarded for a total of \$69,689. These efforts are a beginning. Significant librarian experience and expertise in this area is lacking along with a consistent statewide strategy for strengthening library services to the state’s Hispanic population.

In order to ensure quality library services statewide, planning and evaluation were supported through consulting grants to libraries and the presentation of a planning workshop attended by 50 public library directors. (Objective 2.4) Since the planning mini-grants were offered beginning in 1999, five libraries have done long-range planning and five additional libraries have undertaken comprehensive technology planning. While every public library system in North Carolina has a current long range plan, the plans submitted exhibit a broad range of quality, suggesting a continuing need to improve the skills of public library managers in planning and evaluation. Sixty-six library systems currently have approved technology plans on file because of E-rate requirements, the same number as in 1998 and ten short of the desired number of 76.

At Regional Meetings, participants especially emphasized the important role LSTA dollars played in enabling poorer more rural public libraries make investments in new technology as the focus of this goal was on providing a consistent level of service statewide. [These observations reflect the predominant comments of Regional Meeting participants; see Part III – C (Supporting Materials: Tabulation of Differences LSTA Made for Libraries and for Users) for a full listing.] Money for computer purchases provided the first computers/Internet access for a community or increased dramatically the number of computers available to the public. Because of these investments more users could be accommodated by libraries, users were able to spend more time at workstations, and access was easier. This was seen as especially critical for people who were not able to afford access through a home computer. The availability of more technology in turn resulted in access to more resources for library users across the state.

This goal also focused on library services to Hispanics and planning and evaluation resources and support. The Hispanic Needs Survey and the Hispanic Services Workshop gave libraries information they could use in order to develop appropriate collection and outreach service plans. As a result the Hispanic community now has the public library as a community resource, including a Spanish language materials collection and English as a Second Language resources.

The following stories describing the contributions of activities related to North Carolina LSTA Goal 2 were collected from participants at Regional Meetings.

Stories Related to North Carolina LSTA Goal #2, Achieving Equity in Public Library Service

- *A public librarian on LSTA support for Internet access:*

As the only public library in county, we are the only location where general public has access to Internet.

 - Had elderly man who came in and told us that he wanted to re-establish contact with his commanding officer from his unit in Germany during the 50's. His commander had helped enable him to marry his sweetheart while in Europe. We showed him how to use the Internet. After searching he was able to match phone numbers and names. He made contact with his commanding officer in a nursing home in Florida. They talked over the phone and our patron and his wife of 50 years flew to Florida for a reunion.
 - Patron told me she found her job by using Internet resources at the library. She also used word processing to type resume.

- *A public librarian on LSTA support for Internet access:*

LSTA funds allowed us to upgrade from one dial-up access Internet computer to 11 frame relay computers. This allowed us to provide 10 times the access to the Internet at the faster bandwidth. We are now able to offer classes on Internet use and even basic services on how to use a computer mouse. Especially helpful for senior citizens. Our computer use went from 30 uses a month to over 600 uses a month.

- *A public librarian on LSTA support for Internet access:*

Providing funds for equipment, training, and resources has created an atmosphere of learning for our residents. It has brought our area into the "Information Age." Instead of having to say, "I'm sorry, I do not have that information," to "Let me see how much we can find for you." One night I was working at the public library when a young handicapped girl came into the library. She was having a difficult time walking, not to mention the fact that her speech was impaired because she was hard of hearing. Her mother asked if we could help her get an e-mail address so that she could communicate with a brother and friends from

out-of-town. Yes, we did and her mother came in later and said that it had opened up a world for her.

- *A public librarian on services to Hispanics:*
Monthly preschool storytime in Spanish was provided at our library branch and transportation was arranged and provided. One Friday when the van could not pick up a family, the children burst into tears and the mother and children set out on foot for the library with our outreach staff person following behind through the streets of West Asheville to the library. [Insurance would not cover public being given rides by staff.] Asheville High School Spanish class students volunteers to do storytimes at ESL classes in town. All staff plus two occasional substitutes have taken Spanish to try to learn how to communicate with Spanish-speaking patrons.

Summary Report for North Carolina LSTA Goal #3:
Libraries as Leaders for Children and Teens

Vision for Success: **With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.**

Introduction

The Vision for Success for Goal 3 created projects focused on planning, collaboration, communication, and resource and staff development in order to improve library service to North Carolina's youth. This goal resulted from the work of the State Library Commission's Advisory Committee on Library Services to Children and Youth.

Goal #3 Objectives

Objective 3.1: Children and teens receive services strengthened by collaboration of agencies in their community. *While grant programs have promoted collaboration, a follow-up to the initial research in 1998 would be required in order to determine whether the amount of collaboration has changed.*

Objective 3.2: Children and teens receive library services that are based on long-range community-based plans. *Study would be required to determine whether the percentage of library systems or public library outlets with a long-range community-based plan that includes youth services has changed and whether the percentage of Local Education Agencies with a long-range plan for library media services has changed.*

Objective 3.3: Children and teens are aware of and attracted to library programs and services. *Study would be required to determine the degree to which this objective has been met.*

Objective 3.4: Children and teens in schools have access to accurate, current, and attractive resources. *The accuracy, currency, and attractiveness of school library media center materials can be expected to have increased dramatically in the 153 schools receiving School Library Collection Development grants. Grant applications give evidence of the continuing inadequate and inequitable state of school library media center collections.*

Objective 3.5: Children and teens have access to a range of library programs, services, and resources that respond to their needs and interests. *Data have not been collected to determine the numbers of programs offered for teens or for school-age children, the perceived adequacy of services for teens, or the degree of collaboration by public library outlets.*

Objective 3.6: Children and teens have access to library services designed and managed by professionals prepared for the task. *A subcommittee of the Youth Services Advisory Committee has been formed to examine approaches to increasing the number of youth services librarians.*

Objective 3.7: Children and teens are served by staff with up-to-date knowledge, skills and abilities to deliver library services. *There is no current data available concerning annual participation in continuing education related to youth services by youth services staff.*

A series of workshops and grant opportunities (Powerful Partners) was offered to develop the leadership and collaboration skills of librarians (Objective 3.1). During 1999 and 2000 over 385 school and public librarians participated in the basic workshops, 20 libraries participated in the advanced workshops, and 43 mini-grants were awarded. No data has been collected since the beginning of the project to determine the percentage of libraries that have collaborated with community agencies. However, there has been some evidence of the language/principles of true collaboration from the workshops appearing in LSTA grant applications in other categories.

Although five grants for general planning and five for technology planning were awarded during 1999 and 2000, no applications were received to develop community-based plans for youth services (Objective 3.2).

In an effort to attract children and teens to library programs and services (Objective 3.3), *Libraries: The Very Best Place to Start* marketing and communications campaign was developed. A statewide leadership grant funded a variety of activities including opinion research, a marketing and communications plan and its initial implementation, and media workshops around the state. Over 1400 public library outlets and school library media centers enrolled in the campaign launch, and the Start Me Up! Sweepstakes game resulted in over 165,000 entries from children across the state. Five hundred public library and school library media staff attended the six regional “Launch Workshops” and 71 library representatives attended nine media training workshops. Sharing the results of public relations demonstration projects developed in fall, 2000 and implemented in spring, 2001 will be important in reaching the larger library community in the coming program year. A challenge will be to encourage sustainability at the local level.

Objective 3.4 is based on the assumption that children cannot learn to read or love to learn if the books available to them in their school libraries are not current, accurate, or attractive. EZ-LSTA School Library Collection Development grants were initiated in 2000, and 198 schools applied for, and 153 schools libraries received, grants totaling \$811,171. The median copyright date of applicants’ book collections was 1981. End-of-project reports showed improvements in average copyright date, but complete data is not yet available. Because of the \$1 for \$1 matching requirement, these grants actually supported over \$1.6 million in book expenditures for school

libraries and encouraged community outreach to locate matching funds. In addition, because the grant application required collection assessment activities, the program brought to the attention of school personnel the issue of out-of-date and worn library book collections.

The lack of library programming for young adults resulted in the development of continuing education opportunities for school and public librarians (Objective 3.5). Three regional workshops emphasized adolescent development and ways to apply that knowledge to the planning and delivery of developmentally appropriate programs and services for young adults. Over 170 school and public librarians participated. Five of the eleven Powerful Partners projects funded for 2000/01 specifically targeted services to young adults.

The final objectives (Objectives 3.6 and 3.7) for Goal #3 focused on insuring that library services for youth are professionally managed and provided by knowledgeable staff. A subcommittee of the state's Youth Services Advisory Committee is examining approaches to increasing the number of youth services librarians. Strategies to encourage and track youth services staff participation in continuing education are still to be determined.

At Regional Meetings, participants reflected on the LSTA programs that focused on services for children and teens. [These observations reflect the predominant comments of Regional Meeting participants; see Part III – C (Supporting Materials: Tabulation of Differences LSTA Made for Libraries and for Users) for a full listing.] One program garnering many positive comments from participants was the EZ LSTA Collection Development Grant for school libraries. Participating libraries believed the program made a big impact on their collections, especially in non-fiction. One library totally replaced its science collection and another was able to add new titles representing one quarter of its total collection. Other subject areas mentioned were history, geography, Spanish language, easy readers and accelerated readers. This infusion of new materials into neglected collections benefited students and teachers by providing more books and books that were attractive, up-to-date, accurate and better aligned to the curriculum. "Students notice and use the new resources." The grant required applicants to analyze their collections and match federal funds dollar for dollar. Libraries realized some side benefits as a result of these requirements, although praise was not universal for the required matching dollars. Collection analysis activities helped to make school administrators aware of collection weaknesses and then see the difference additional funds could make in improving library resources. The match requirement leveraged more funds for the library and stimulated community partnerships with area businesses, foundations, private trust funds, and service organizations.

The Very Best Place to Start was the most controversial of grant programs at the regional meetings. Many participants felt the program raised awareness among children and adults of library services and brought schools and public libraries together. "School and public library cooperation increased awareness of the importance of marketing and raised community awareness of library's importance." "Kids are reading and talking about books." Criticisms of

the program included a tight timetable with little understanding of school calendars and insufficient time to build cooperative activities. Information on the program was not well distributed to those who needed to be involved in program implementation at the building level. Some participants questioned the amount of money spent on the campaign, various elements of the campaign, and the effectiveness of a statewide PR effort.

The collaborative activities and increased communication encouraged by the Collection Development Grants and The Very Best Place to Start were further fostered by Powerful Partners workshops and grant opportunities. Cooperative relationships among libraries and between libraries and their communities resulted in access to more resources and increased awareness and utilization of library collections for library users. “Barriers to communication dropped tremendously; for example school people sharing curriculum changes with the public library.” “Tenth graders are excited about the Powerful Partners project and about reading. They have developed a website and they’re teaching and sharing their excitement with younger kids.”

The following stories describing the contributions of activities related to North Carolina LSTA Goal 3 were collected from participants at Regional Meetings.

Stories Related to North Carolina LSTA Goal #3, Libraries as Leaders for Children and Teens

- *A school librarian:*
LSTA school library collection development grant has provided dynamic change for our school district with regard to funding print collections. It opened a dialogue between community partners for financing print materials. It stimulated civic community sponsorship of print materials. It opened up other grant opportunities. One school received \$5,000 LSTA, \$5,000 community partnership, and \$5,000 from local private foundation. It stimulated school-wide analysis of collection mapping financial study for past 3 years. It stimulated local (school board) support of print collection. It stimulated school district weeding. It stimulated long-range planning and collaboration between teachers and school media coordinators (weeding parties). It caused balcony view of media programs. It provided leverage to make changes. Principal accountability. It caused change in non-grant schools.
- *A school librarian on the school library collection development grant:*
Last year I received \$1314 in matching funds (\$2628 total spent on books) from an LSTA grant to buy geography books for our high school. Our geography collection averaged 30 years in age. With LSTA funds, we purchased 115 books on countries. We printed a bibliography of the area books and distributed it to all teachers. Within an hour of the lists going out, 3 teachers who were teaching geography out of field came to the library to check out these books for classroom use. Teachers assigned students to do projects such as travel

brochures, posters to boost tourism, and dioramas to portray sites of interest in different countries.

- *A school librarian on the school library collection development grant:*

Arturo was a new student to our school, arriving mid-year. He was going to be in third grade, and he spoke only Spanish. On his first day, early in the morning, well before the bell, two little girls who had been third graders for only a month or two themselves came into the library with Arturo in tow. “Libor en espanol” was all I could really make out in their conversation. I had used my LSTA grant funds to buy as many early reader books in Spanish as I could find. The girls pulled Arturo over to the bookshelves, laughing and chattering. Arturo glanced at me once: he look bewildered. But a few minutes later he was at the check-out desk again, beaming from ear to ear. He handed me the three early readers in Spanish and I asked “Whose class are you in?” Arturo couldn’t answer, but one of the girls told me, adding “He’s a new student.” It was his first day, and he had come to the library before he had even been to a classroom!
- *A school librarian on the Start Me Up Sweepstakes:*

Picture the school librarian stepping out of her “Ivory Tower” and entering the noisy, chaotic scene of the school cafeteria. “Would you like a ‘Very Best Place to Start’ sticker?” she asks. Within minutes, dozens of teenagers are wearing the pointing finger emblem and filling out game cards. Students are now seeing the media center in an exciting new light. As they return their game cards to the school librarian, new interest is generated. Imagine the bare, white, sterile walls surrounding the outside of the media center suddenly brought to life with exciting student made murals. These visuals depict scenes from the most recent books that they have read. When passing by these creations, students’ and teachers’ attention is drawn to the fact that young people love books and stories and they spark their imaginations.
- *A school librarian on The Very Best Place to Start:*

Recently two students came into my school library, looking for information on an assigned topic. The first came to me for a consultation, while the second wandered on his own. A short time later, the first was at work taking notes and resulting several sources, while the second was still wandering, saying he could find what he needed on his own. Several minutes later the first student pulled his friend over to me, telling me his friend did need help. As I walked away from their table, having settled the second student with his own stack of source material, I heard the first boy say to his friend, “See, I told you she was the best place to start!”
- *A public librarian on Powerful Partners:*

When the county nurse supervisor from the health department announced at the monthly Interagency/Juvenile Justice Council meeting that the Powerful Partners grant cooperatively sought and administered by the public library and the k-2 school was indeed reaching

families that could profit greatly from the services provided I knew that our goal of reaching children and their families to promote reading and loving to learn was successful. Our Powerful Partners project focused on collaborative programming, cooperative collection development, and mutually supportive public relations efforts. Families who might not otherwise have been aware of the resources available to them have been coming to both the school and the public library for Toddler Times, held once each month at each site and Family Reading Nights, held at each site monthly in alternate months. Because the grant had a component that provided for giving each family a book upon completing a short survey at each program, families' home libraries have been enhanced. Parents want the best for their children; a free new book each month may not seem like much, but for poverty-level families, it can be significant. Long range impact because of groundwork laid this year.

- *A school librarian on Powerful Partners:*

I would say the campaign overall has done a number of things for the library community.

- a) Collaboration and discussion between the school and public library.
- b) \$ for needs both in equipment and community outreach
- c) Students receiving the benefits of both the school and public collaboration

I have seen students actually enjoy and find books that worked well for their research, and [realize] the efficiency of that specific print text over the Internet searching/surfing. Thank you for including and networking with schools.

Summary Report for North Carolina LSTA Goal #4:

The State Library as a Leader in Library and Information Services

Vision for Success: The State Library serves as a model and a leader in the development and delivery of library and information services.

Introduction

The Vision for Success for Goal 4 resulted in the creation of planning documents and technology demonstration models that are leading the way to better access to state and library resources for all North Carolinians.

Goal #4 Objectives

Objective 4.1: The State Library develops and updates plans, standards, and guidelines to support the development and use of information technology in libraries statewide. *A statewide technology plan with appropriate standards and guidelines to serve as a single document with appropriate goals and priorities is not yet available.*

Objective 4.2: On an ongoing basis, the State Library tests and models approaches for integrating technology into library management and services. *Study would be required to determine whether libraries are benefiting from State Library information and leadership.*

Objective 4.3: The State Library's provides leadership in evaluation, assessment, and measures of library effectiveness. *State Library staff have been actively involved in the evaluation of the LSTA plan and have been strengthened in evaluation skills.*

Objective 4.4: Assure statewide access to state government information in all formats. *The State Library designed a metadata database with the assistance of an outside software vendor, developed FIND NC, and investigated government information programs in other states.*

Objective 4.5: On an ongoing basis, State Library supports statewide planning and development activities to assure achievement of the LSTA goals, plans and priorities. *The State Library has worked with broadly representative stakeholder and customer groups for at least three major initiatives and has sought participation of the library community in planning and evaluation of the LSTA plan.*

Minimum Standards for Library Automation in North Carolina (Objective 4.1) ensured that grant-funded automated system projects (see Goals #1 and #2) resulted in adequate and functional integrated library systems to support access to resources for users and effective management of the library and its resources. A statewide technology plan is still to be developed. Development of the standards used no LSTA funds.

My Library@Project is testing the process of developing customizable web-based portals. This will be followed by library staff training and the dollars needed for hardware purchases. (Objective 4.2) Evaluation is not yet available as it is too early in the project's development.

Objective 4.3 focuses on state leadership in evaluation, assessment and measures of library effectiveness. State Library staff participated in an Institute of Museum and Library Services national pilot program. As yet, no specific evaluation models have been successfully implemented. This objective used no LSTA funds.

In Objective 4.4 the state sought to model innovative delivery of library service in the provision of state government information. Under this objective the state library piloted the use of Government Information Locator Service standards to metatag North Carolina government web resources. At the end of 1998 two state agencies tagged their resources. Since then no additional state agencies have created metadata for their resources. Extensive developmental work was also done on FIND NC, the State Library's central gateway to state government web resources. A strategic plan for public access statewide to state government information in digital format remains to be developed.

The final objective for Goal #4 (Objective 4.5) resulted in the development of *Powerful Partners: Strategic Plan for Library Services to Youth in North Carolina*. The plan in turn led to the development of a variety of grant programs discussed earlier including Libraries: The Very Best Place to Start, Powerful Partners, and School Library Collection Development Grants. Also realized under this objective was creation of *North Carolina Libraries: Building Communities, A Plan for Cooperation*. Goal #1 describes projects undertaken as a result of this plan including NC ECHO, a prototype Web portal that features the digitized resources of libraries, archives, museums, and historical societies across North Carolina. Both for the development of the LSTA Plan and for its evaluation, regional meetings were held across the state to allow the broadest participation of members of the library community.

At Regional Meetings, participants had fewer comments to make, perhaps because it was the last goal reviewed or because this goal had no grant programs providing dollars directly to state libraries. [These observations reflect the predominant comments of Regional Meeting participants; see Part III – C (Supporting Materials: Tabulation of Differences LSTA Made for Libraries and for Users) for a full listing.] Many of the activities undertaken for this goal provided the planning foundation for projects discussed under earlier goals. Other activities are still very much under development with benefits yet to be realized statewide. Benefits most often mentioned by participants related to the State Library's role in using technology to offer more and better access to the state's information resources and to providing technology support and training for librarians who in turn can provide better service to library users. FIND NC was seen as giving library users a faster easier way to obtain government information while NC ECHO facilitates access to

information from special collections. Remote access to NC LIVE gives users a more convenient way to use that great resource. Participants noted that the publication of *Minimum Standards for Library Automation in North Carolina* provided libraries with technology support in a number of ways. The *Standards* helped libraries justify the purchase of new computers and helped make funders aware of local technology needs. The *Standards* also helped focus purchasers on functionality and quality, not just price. For library patrons this meant being able to use equipment appropriate for the “job” of accessing the growing variety of electronic resources now available. While agreeing that the *Standards* could be helpful, some participants suggested that they needed to be revised because they were too low for some libraries.

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In-Depth Examination of Two LSTA Program Aspects

This evaluation of North Carolina's LSTA program included an emphasis on two aspects of the program: public access to the Internet through public and academic libraries and services for youth in public and school libraries. Sources of evaluation material came from:

- the evaluation reports prepared for each objective of the LSTA plan,
- the benefits to libraries and to users cited at the regional meetings,
- specific sessions at the regional meetings that reflected on the emphasis area, and
- relevant expressions of needs and priorities at the regional meetings.

(1) Focus on Internet Access for the Public in Public and Academic Libraries

The first two priority needs cited in the LSTA plan relate to **providing public access to the Internet:**

- The need to develop an infrastructure that will support access to networked information for North Carolinians statewide
- The need to plan and deliver comprehensive programs of training, technical assistance, and information sharing to enable staff to integrate technology into library services

Grant activities that responded to these priority needs were:

Program	Funding 1997-2000
Basic Equipment Grants (141 subgrants)	\$1,227,591
Enhanced Connectivity Grants (38 subgrants)	1,283,740
Continuing Education for Technology	122,002
Training for NC LIVE	117,249
The Master Trainer Program	106,476

The evaluation report for Objective 1.2 details the results of the Basic Equipment and the Enhanced Connectivity Grant programs. Increases in the amount of physical access to the Internet are so dramatic that it appears that the basic requirements for access in public and academic libraries will be met in the next year. Activities in support of this emphasis include:

- funding of the Basic Equipment Grant (BEG) program to provide libraries with sufficient up-to-date computer workstations, meeting a minimum level of adequacy in both computing power and in number of workstations, as established for the BEG and ECG programs, to ensure adequate access to online electronic resources available through the Internet (including NC LIVE):
 - In 1998, 104 BEGs were awarded: 61 to public libraries, 31 to community college libraries, and 12 to academic libraries.

- In 1999, 23 BEGs were awarded: 9 to public libraries, 11 to community college libraries, and 3 to academic libraries.
 - In 2000, 14 BEGs were awarded: 7 to public libraries, 6 to community college libraries, and 1 to an academic library.
- funding of the Enhanced Connectivity Grant (ECG) program to improve the level and quality of library user access to Internet resources (including NC LIVE). The program's focus includes not *only* assisting libraries in meeting minimum standards for adequate computer workstations, as established for the BEG and ECG programs, but also enabling them to obtain adequate networking hardware and bandwidth for Internet connectivity as well as equipment for staff and user training in electronic resources.
- In 1998, 22 ECGs were awarded: 16 to public libraries, 3 to community college libraries, and 3 to academic libraries.
 - In 1999, 12 ECGs were awarded: 10 to public libraries and 2 to community college libraries.
 - In 2000, 5 ECGs were awarded, all to public libraries.
- maintenance of minimum standards, guidelines and levels of adequacy for user access: During each funding year, the standards for minimum computer equipment purchases were updated to reflect the best combination of computing power and purchase price. Levels of adequacy were established in 1997 for purposes of these grant programs and have remained constant.

Results of these activities are:

Public Libraries:

In January 2000, 343 of 367 public library outlets (93%) offered Internet access to the public, a 256% increase since 1997. (This information was obtained from a quick response survey of NC public libraries.) As of June 2000, 44 of the 76 public library systems (58%) met minimum adequacy, defined as 1 public access workstation per 5,000 legal service population. This is a 2200% increase since 1997. (This information was obtained from public library statistical reports for 1999-2000.)

Community College Libraries:

As of July 2000, all 58 community colleges offered Internet access to students in the library on the main campus of each community college.

College Libraries:

With 40 of the 58 colleges reporting, 16 met minimum adequacy, defined as 1 public access workstation for each 100 FTE (full-time equivalent student population). This represents 40%

of the colleges reporting and a 400% increase in colleges meeting minimum adequacy since 1997.

The training component of public access to the Internet is found in the evaluation report for Objective 1.4.

Activities that related to training were:

- Funding a continuing education program of technology-related workshops to help library staff in all types of libraries integrate the use of technology into the delivery of library services: A separate program of workshops to train library staff in the use of NC LIVE resources was also funded. During the evaluation period, a total of 154 technology-related workshops were sponsored. Seventy of these sessions were part of the NC LIVE training program.
- Initiating the Master Trainer Program to increase the ability of local library staff to conduct effective internal training for library staff with a focus on technology: The Master Trainer Project began in 1998 as a demonstration project with staff members from 12 public libraries. In Spring 1999, 22 Master Trainers – 11 each from the academic and public library sectors – joined the program. New Master Trainers were not recruited during FY 1999-2000. Rather, the State Library increased its support of the Master Trainer network through monthly conference calls where the trainers consulted and coached each other, an electronic discussion list, and a two-day skills “refresher” meeting.

Results of these activities in 1997-2000 were 154 technology-related continuing education workshops being attended by 2,474 library staff. As of December 2000, the Master Trainers represented 27 libraries across the state – 8 academic institutions and 19 public libraries.

Participants at the Regional Meetings testified to the impact of these programs. Greatest emphasis in terms of benefits to users was given to the ability to accommodate more users through more access points. The next most frequently cited benefit was the increased access to more materials. The training programs were also cited as important benefits for staff and for users.

At the Regional Meetings, special sessions were held to reflect the LSTA emphasis on Internet access for the public. Participants were asked to use a “plus/delta” approach, which is to first comment on what worked well about the program and then to suggest what could be improved. [The comments made in these sessions can be found in Part III – D (Supporting Materials: Plus/Delta Comments Made at Regional Meetings on Internet Access for the Public in Public and Academic Libraries).] Participants showed recognition of and

appreciation for the various components of this program emphasis: technological infrastructure, electronic resources, and staff training. Comments on could be improved call for “more of the same”: more training, improved equipment, more resources. Some comments related to grant guidelines needing revision, a need to raise the level of standards, and concerns with content on the Internet.

The Needs and Priorities that relate to this emphasis also call for more of the same:

- a great number of requests for training—largely on technology and electronic resources,
- needs for technology support in the form of consultants and support staff,
- enhanced electronic access to collections, and
- increasing bandwidth.

There is a clear picture of a program that has addressed an important need for North Carolina libraries, that has had remarkable success, and that has stimulated an interest in continued or increased State Library programs.

(2) Focus on Services for Youth in Public and School Libraries

The second area chosen for emphasis in this evaluation was **services for youth in public and school libraries**. This emphasis in the LSTA plan resulted from needs assessments conducted in 1997-99.

Fall 1997: Conducted a literature search on current practices and trends in library services to children and young adults as background information for the committee

Winter/Spring 1998: Working with independent consultants and State Library staff, conducted surveys to assess current public and school library services to children and young adults in NC. From the public school media center surveys 57 of 117 school systems responded. From the public libraries surveyed, 291 of 350 responded.

Also contracted for opinion research to assess public attitudes toward library services to North Carolina’s children and teens. Focus groups were held in *September 1998*, and a statewide poll was conducted in *January 1999*.

Fall 1998: Held a two-day invitational leadership conference seeking input from key members of the library community and other stakeholders on the results of the assessment of current library services to children and young adults in NC. 71 representatives from the school and public library communities, as well as library educators, teachers, and children’s authors attended the conference.

Winter/Spring 1999: Based on the data gathered, the Youth Services Advisory Committee drafted a “Strategic Plan on Library Services to Youth” for statewide library development strategies including grants and continuing education.

Spring 1999: Draft plan was reviewed at regional meetings of school and public library representatives. 175 school media specialists and public librarians participated in the regional meetings.

In *Spring 1999* the State Library recruited a public relations and marketing firm to assist in developing a campaign based on the findings of the opinion research.

Summer 1999: State Library Commission adopted the final plan titled *Powerful Partners*.

The vision of the strategic plan focuses on libraries and librarians taking a leadership role in working with their communities to assure that every child and teen in North Carolina learns to read, loves to learn, and has access to the world.

Grant activities in support of this vision were:

Program	Funding 1997-2000
School Library Collection Development (153 subgrants)	\$811,171
Libraries & Librarians as Leaders & Powerful Partners	396,617
Youth Services Assessment & Planning Project	26,743
YSAP/Strategic Communications Research & Planning	252,347
Libraries: The Very Best Place to Start	962,117
Developmental Needs of Youth	24,273

The School Library Collection Development grant program, described at Objective 3.4, was initiated in 2000 to call attention to and partially address the documented inequities and inadequacies in school library collections across the State. The grant program sought to energize local support for school library collections by requiring a collaborative approach to the grant application and a dollar-for-dollar local match for grant funds. In 2000, 153 grants were awarded, generating over \$1.6 million in funds for books in school libraries.

The Powerful Partners program is described under Objective 3.1. From 1997 to 2000, 30 Powerful Partner mini-grants were awarded to 22 public and 8 school libraries for a total of \$13,300. Thirteen Powerful Partner Collaboration grants were awarded to 11 public and 2 school libraries for a total of \$344,824. In addition 385 library staff have participated in Powerful Partners Collaboration workshops.

A major LSTA initiative was the Libraries: The Very Best Place to Start (VBPTS) marketing and communications campaign described in Objective 3.3. This multi-faceted program was developed based on state-wide opinion research conducted in 1998-99 that involved surveys and focus groups with North Carolina residents. While public relations is a general need for libraries in the State, the marketing and communications program was intended to address two needs: the need for increased emphasis on services for youth and the opportunity to use this campaign as a pilot that would allow the testing of communication strategies on a state-wide scale.

In-state surveys had found in 1998 a low level of services addressed to young adults in public libraries. The Developmental Needs of Youth project, funded at \$24,273, was an initial effort to address this lack. In the spring of 2000, 170 participants representing all 75 public library systems in the State participated in Developmental Needs of Young Adults workshops. The workshops included viewing of videotape from focus groups conducted with North Carolina young adults.

At the Regional Meetings, the synergy from these interrelated programs was evident in the comments from public and school librarians. Benefits cited related to increased collaboration, the improvement of school library collections, and the excitement of participation in VBPTS.

At the Regional Meetings, special sessions were held to reflect on the LSTA emphasis on services for youth in public and school libraries. Participants were asked to use a “plus/delta” approach, that is to first comment on what worked well about the program and then to suggest what could be improved. [The comments made in these sessions can be found in Part III – E (Supporting Materials: Plus/Delta Comments Made at Regional Meetings on Services for Youth in Public and School Libraries).] Much appreciation was expressed for the complex of programs that addressed services for youth. School librarians shared the impact of the School Library Collection Development grants on their schools and on their libraries’ collections. Both school and public librarians noted the collaborative benefits of the Powerful Partners and VBPTS programs. Improvements involved requests for increased support for school library collections and a variety of suggestions for the VBPTS program. In particular, participants suggested that VBPTS should have more local involvement in planning of local campaigns, should rethink the timing of the campaign, and should refocus the use of media. While there were some negative comments on the strategy, the general thrust of the comments was appreciative and interested in improvements.

The Needs and Priorities related to this emphasis on services for youth expressed at Regional Meetings were generally calls for more of the same:

- collection development grants should be continued and even expanded to public and community college libraries
- continue to provide support for and opportunities for collaboration

- continue to develop a marketing and communications campaign for libraries and follow through on the good start made with VBPTS

Again, there is considerable evidence that this multi-pronged approach to improvement of services for youth has had strong and positive effect and merits continuation so that more can benefit.

Summary of Needs and Priorities from Regional Meetings

At the Regional Meetings, participants were asked to share their opinions on the needs and priorities for the next LSTA plan and then asked to articulate how a need or priority would impact library users. Generally speaking participants gave a “vote of confidence” for the current LSTA plan because many of the suggestions offered could be summarized as “more of the same” or “continue with some revisions.” There was also some interest in certain categories in organizing more services on a local or regional level rather than from the state. Examples of this would be funds for technology support staff for a region or union catalogs for an area. Following the meetings, comments were sorted by 12 different categories. Brief descriptions of those categories follow in priority order. Those categories garnering the most comments are listed first. The number of times the topic was mentioned by meeting participants is recorded in parentheses. The full listing of Needs and Priorities can be found in Part III – F (Supporting Materials: Tabulation of Needs and Priorities for the Next LSTA Plan).

The categories of needs and priorities are:

- Continue and Expand Programs of Outreach to Underserved (103)
- Hardware and Software (93)
- Training (85)
- LSTA Mechanics (70)
- Expand Collection Development (62)
- Expand/Promote NC LIVE, NC ECHO, FIND NC (50)
- Public Relations(48)
- Continue to Promote Collaboration (43)
- Electronic Access to Collections/Improved Inter-Library Loan (33)
- Technology Support (24)
- Funding for Increased Bandwidth (15)
- Miscellaneous and State Library Role (21)

The “**Continue and Expand Programs of Outreach to Underserved**” category received the most comments with various populations suggested as possible beneficiaries. Hispanics received almost as many mentions (25) as all other groups combined, while seniors, the poor and teens were among other suggested target populations. Many specific kinds of outreach activities were suggested, especially collection development, but also staff training and programming assistance.

Impact on Users: These activities would reach those who need it most and may not currently have access to library resources.

Next in order of participant interest was **“Hardware and Software.”** The word “upgrade” was heard frequently in terms of library computer workstations, peripherals, software, and automation systems, with many worries expressed about replacing Gates computers in the future. Expanding the availability of computer technology was suggested for bookmobiles, branch libraries, school libraries, academic libraries, and through the purchase of laptops for community outreach. Concerns were expressed about the adequacy of current minimum standards. Some questioned whether it was true that all but one of the state's public libraries meet the existing standards because of requirements such as graphical interface.

Impact on Users: Filling these needs means faster, easier and more equitable access to library resources statewide.

“Training” in new technology received a lot of attention, with participants asking for training to keep staff proficient and current in using electronic information resources. There were also requests for learning how best to train others, including continuing and expanding the Master Trainer Program, and computer basics and troubleshooting. Rather than depending on the state to offer the training, some suggested that state funding be used to enable library systems to design and offer training for local area library staff through grants, tuition reimbursement and travel money. Alternative continuing education delivery systems mentioned included online staff development courses, fostering collaborative training opportunities among types of libraries in an area, and the development of training kits with traveling laptops that could be lent to libraries.

Impact on Users: Increased patron satisfaction as a result of users finding qualified staff to help them fill their information needs

When examining the **“LSTA Mechanics,”** participants asked for improved communication about grant opportunities and grantwriting, more flexibility within Federal guidelines, and better overall program evaluation and reporting. Reduced paperwork was an especially attractive idea as participants asked for a simplified application and for continuation of the “Letter of Intent” process. Longer timelines and multi-year grants were popular ideas. And there were requests to encourage more local initiatives.

Impact on Users: None identified

Participants wanted to **“Expand Collection Development”** grants. Collection development grants were praised by those school libraries that participated in the program and desired by those libraries that had not received grants, including currently ineligible libraries. Some requested collection development money for specific needs such as children's and non-print collections. Grant revisions were suggested, such as reducing or eliminating matching requirements and not restricting grants to one year.

Impact on Users: Although there seems to be an emphasis on digital information, the need for books still exists so that users will have access to top-quality, attractive books with current information.

Participants said **“Expand and Promote NC LIVE, NC ECHO, FIND NC.”** Merge NC LIVE and NC Wise Owl. Expand the number of resources available by adding new databases and by continuing to identify and digitize special collections. Make these tools easily available statewide. Promote them.

Impact on Users: Easier access to more resources for all North Carolina citizens

Participants seemed to agree that there is a need for library **“Public Relations,”** but there are differences of opinion as how best to carry out a public relations program. Public relations needs were often expressed in relation to the “Very Best Place To Start.” Some participants wanted to drop the entire program, while others suggested a variety of steps to refocus, revitalize and improve the effort. Activities were suggested by some to bring the PR efforts closer to the local library, while others thought statewide marketing and “branding” were important emphases.

Impact on Users: The public becomes more aware of the availability and value of library resources and services and think of the library as “the place to go.”

The state should **“Continue to Promote Collaboration,”** especially among different types of libraries, in order to improve access to area library resources. Participants suggested continuing Powerful Partners, extending it to other types of libraries, and initiating other grant programs to stimulate collaboration. The state should also continue its efforts to provide opportunities for staff from different types of libraries to meet, plan and learn together and improve communication among libraries at state and local levels.

Impact on Users: Increased patron awareness of the continuum of library services available and better access to improved library resources and services

“Electronic Access to Collections/Improved Interlibrary Loan” included state support for expanded and enhanced OCLC participation by all North Carolina libraries. The result would be more opportunities to share resources, especially locally. Suggestions were made to improve the state's interlibrary loan process including providing model systems.

Impact on Users: Better catalog access to the State's library resources and the ability to locate materials closer to home

“Technology Support” was requested in the form of more technology experts, automation planning assistance, and revised standards. Participants envisioned more technology help closer to home with a specialist assigned to their region, or a “circuit rider” who visited libraries across the state.

Impact on Users: Patrons would experience fewer technical problems with computers and equitable access to electronic resources across the state.

Participants identified “**Funding for Increased Bandwidth**” in order to provide more, better, and faster connectivity.

Impact on Users: Users will be able to more effectively search for information.

“**Miscellaneous and State Library Role**” covers a variety of suggestions including issues surrounding Internet access, State Library monitoring, evaluation and reporting on legislation, planning and evaluation assistance and money for library personnel.

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Lessons Learned in North Carolina – The Evaluators’ Perspective

The evaluation team of Douglas Zweizig and Coral Swanson prepared the following comments. They traveled into North Carolina as outside observers, conducting the evaluation of North Carolina’s first years of implementing its LSTA program. Their process included regional meetings with representatives from the library community, reports from State Library staff on each objective, and participation in stakeholder meetings. They identified the following list of “lessons learned” based on their evaluation.

- The planning process for LSTA was broad based and inclusive and resulted in a plan that was generally seen as meeting the needs of libraries (and, we think, library users) throughout the state. Librarians appreciated the inclusiveness of the process and the regional and multitype opportunities to participate. Continue that strategy.
- The exception to this was the public relations component of the plan that met varying levels of resistance and success across the state. This expensive cutting edge project might have included more librarians in the initial planning. This could have avoided problems reported during the evaluation process including timelines that didn't work for school districts and insufficient time for local planning and implementation. The project moved faster than did the understanding and acceptance of the project, suggesting more effort in communicating with librarians across the state about the project and its benefits.
- Objectives should be written with evaluation in mind. Waiting three years before determining whether the information exists to conduct the evaluation will mean the data won't be available when needed. Periodic reviews of the plan can help anticipate evaluation needs. Involving State Library of North Carolina staff in the evaluation proved effective. It may be useful for each objective to have one staff member assigned to collect needed data and monitor progress.
- Individual library project evaluations could be better structured so as to contribute more to the state's LSTA evaluation process.
- Matching fund requirements leverage more project dollars. This requirement energized local sources of support and was generally acceptable to the libraries.
- Because non-public libraries are new to LSTA more intensive communication and training is needed in order for them to take fuller advantage of the program.
- Collaboration among all types of libraries is desired and appreciated by NC libraries, but it does not happen spontaneously. State-offered incentives, mechanisms, and opportunities may be necessary to encourage it.
- Planning is not widely engaged in by libraries, and the benefits are not obvious to them. As with multitype cooperation, the state may need to offer incentives, mechanisms, and opportunities in order to encourage it.
- Depending on the program, abbreviated application forms can work well and are appreciated.

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PART III SUPPORTING MATERIALS

A. *Questions and Comments from Regional Meetings*

Note: "Item numbers" in some responses refer to items on the evaluation form completed by Regional Meeting participants. See Part IV – B (Evaluation Form Used at Regional Meetings).

Questions

Waynesville:

- Are the "Minimum Standards for Automation Systems" in writing? Could we have a mini-workshop on this topic?
- What happens to LSTA funds left over at the end of a federal fiscal year—are all libraries given an equal shot at these funds?

Washington:

- How will you get the word out about grants available in the future to school libraries? Especially us rural ones 😊.
- There are 2100 school libraries and probably under 500 totaled academic and public libraries. Are school libraries getting fair \$ and fair representation?

Raleigh:

- How often can you apply for a collection development grant?

Comments

Fayetteville:

- The information in the PowerPoint presentation in the Overview was very helpful, but perhaps it could be presented differently, with[out?] the presenter reading each of the slides/repeating the wording on the slides.
- A well-planned and well-executed session. I feel confident that our comments will be taken into consideration & I am grateful for the opportunity to participate. It was a good learning experience for me as well as a newcomer to the state—so felt I learned as well as contributed. Thanks, everyone!
- Rural public libraries do not necessarily have the same economic assets or problems as urban public libraries. Many rural libraries need help in obtaining equipment and materials that should be considered "basic" library resources. LSTA can help, but in some cases small rural libraries do not have the staff to investigate and write grant

requests. The E-Z grants have been of great help. I hope that type of grant will continue to be available to us.

- Great opportunity to express needs & wants
- I am still unhappy that LSTA seems to be focused exclusively on electronic access to information. Since this is apparently mandated by Congress, perhaps state funding needs to be made available for books (remember them?), construction, more staff positions, in short all the things that LSTA will not fund. We were not even allowed to discuss these things today. We have other needs besides computers and technology enhancements.
- This was a good opportunity. Thank you.
- [Explaining the score of “3” for item #6, “promoting conversation and collaboration”] Very tough job. “3” denotes a high level of success.

Mocksville:

- [a school librarian]—[Re item #5, “involving all types of libraries”] Seems to be a lack of this, but I am new to the overall LSTA program & there may be more of this than I am aware of.
- [Re item #6, “promoting conversation and collaboration”] This has been a bonus for me & would like to see continued efforts promoting collaboration.
- Having been in NC for a little over one year, I have no real knowledge of prior LSTA activities.
- A very positive meeting, but not much room for negative comment.
- Please reference our comments & feedback in the groups.
- [On inability to rate on item #3 through #6] Not certain—no real compelling evidence offered
- Too much facilitation in today’s workshop!!
- Regret there was no open discussion.
- [a school librarian]—[Re item #5, “involving all types of libraries” and item #6, “promoting conversation and collaboration”] For schools, 100%
- It would be great to allow applicants to apply for funding the following year, so applicants will continue to complete their projects.

Waynesville:

- I understand that success stories are key to continued funding at the federal level, but it is hard to do both in one day: to come up with success stories and critique & evaluate.
- Thank you for a good workshop.
- [a school librarian]—Food was good. People were friendly and made me very comfortable.

Washington:

- [Re rating of “2” for item # 1, “increased your understanding”] Already had occasion to know.
- [a public librarian]—I enjoyed the day. I intend to apply this year. I look forward to more collaboration between public library & public schools.
- [a public librarian]—I have just applied for the LSTA grant (3/2001) for the first time. However, from the conversation of the attendees, the monies have produced very effective results for NC patrons, of all ages.
- [a school librarian]—[Re item #6, “promoting conversation and collaboration”] Need more; not enough trickled down to all library people. Need more meetings.
- Facility works well for this kind of meeting. Food is good. Doug was a good coordinator. State Library staff understood their tasks, carried them out well.

Raleigh:

- Next time for evaluation, let us know ahead of time that you would be interested in stories & future ideas.
- [a public librarian]—Very enlightening. I did not realize “school” libraries were part of LSTA. I think all libraries need to work together. Media coordinators are a thing of the past. I think school (elementary, jr., hi) should focus on curriculum and work public libraries for all other material.
- State Library staff—AWESOME
- Need to bring in more special libraries to help identify resources. Examples:
 - ✓ Law libraries might be able to build legal portal
 - ✓ Medical/hospital AHEC libraries identify medical resources
 - ✓ Business, etc. etc.

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PART III SUPPORTING MATERIALS

B. Staff Evaluation Reports for Individual Objectives

North Carolina LSTA Goal #1: Enabling All Libraries to Serve as Gateways to Information

Vision for Success: Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond.

Objective 1.1 : Complete the plan for a statewide network of libraries based on cooperation, collaboration, and technology to support information access through all types of libraries. (Evaluation Reporter: Julie Blume Nye)

This objective supports the goal of **Enabling All Libraries to Serve as Gateways to Information**, with its Vision for Success that *Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond.* This objective was included in response to the clear need expressed during the original LSTA planning process: ***The need to plan and implement a comprehensive program to support cooperation and collaboration among libraries of all types to assure access to print and electronic information for library users statewide.*** Such a plan was a critical first step in enabling libraries to work together to achieve the vision.

Activities to support this objective during the evaluation period (1997-2000):

- State Library staff prepared "Library Cooperation and Resource Sharing in North Carolina: An Overview" in September, 1998.
<<http://statelibrary.dcr.state.nc.us/nclin/ilc/background.pdf>>
- North Carolina Conference on Interlibrary Cooperation held in Greensboro, October 7-8, 1998. Approximately 80 library leaders from public, academic, school and special libraries attended, with representatives also from library education and key library associations. Results formed basis for discussion paper and content of regional meetings (see below)
- In November, 1998, the Interlibrary Cooperation Committee identified short-term priorities for LSTA funding, based on recommendations from the Greensboro conference. Priorities identified included: support for batchloading library holdings into OCLC, technology and connectivity improvements to support remote access to NC LIVE, retrospective conversion and digitization. State Library staff prepared an "Update on LSTA funding for library cooperation, 1998-99 and 1999-00."

- “Library Cooperation in North Carolina: A Discussion Paper” prepared by staff and members of the Interlibrary Cooperation Committee for regional meetings in early 1999. <<http://statelibrary.dcr.state.nc.us/nclin/ilc/discuss.pdf>>
- Six regional meetings (Greenville, Fayetteville, Charlotte, Asheville, Chapel Hill and Greensboro) held in March, 1999. More than 250 invitations were issued; just over 200 public, academic, school and special librarians attended. <<http://statelibrary.dcr.state.nc.us/nclin/ilc/regional.htm>>
- Working with consultant Maureen Sullivan and drawing on feedback from the regional meetings, the Interlibrary Cooperation Committee adopted “North Carolina Libraries: Building Communities - A Plan for Cooperation.” Plan approved by the State Library Commission on June 14, 1999. <<http://statelibrary.dcr.state.nc.us/nclin/ilc/plan990614.pdf>>

Information on Outcome Measures and Benchmarks:

What was measured?

Outcome Measure 1.1.1: By September 30, 1999, complete the plan for the statewide network.

Result as of the end of 2000:

The plan was adopted by the State Library Commission in June, 1999.

Staff observations:

With a plan in place, the objective has been achieved. *North Carolina Libraries: Building Communities - A Plan for Cooperation* sets out a number of strategic directions, only some of which have been addressed—either through LSTA support, NC LIVE initiatives, or internal State Library efforts. Some of the specific outcomes were incorporated into the LSTA Plan; these are excerpted here with a brief status report and reference to the section of *North Carolina Libraries: Building Communities - A Plan for Cooperation*:

I. Access

4. Increase Internet access to specialized resources:
 - Unique local and statewide collections in libraries, archives, museums, and historical societies. (*major progress via LSTA-funded Access to Special Collections project, Objective 1.6. Background and plan at <http://statelibrary.dcr.state.nc.us/ld/ascwg.htm>; Prototype portal to cultural collections: <http://statelibrary.dcr.state.nc.us/asc/asc.html>*)
 - Local, state, and federal government information. (*Access to state government information was the focus of some LSTA funding under Goal #4.*)
 - Expand funding for statewide networking and hardware to support high-

speed universal access to the Internet. (*Elements in individual libraries supported under Objective #1.2 and #2.2*)

II. Services

1. Provide staff development and training programs for libraries throughout the State. (*LSTA-funded State Library CE initiatives supported under Objective 1.4 contributed to achieving this.*)

III. Materials

- Evaluate and expand the core resources of NC LIVE on an ongoing basis. (*NetLibrary resources purchased with unobligated LSTA funds at the close of federal fiscal year 2000.*)
2. Use OCLC's WorldCat database as North Carolina's union catalog:
 - All libraries sharing materials will enter their holdings into WorldCat. (*Significant LSTA support for batchloading by public and academic libraries, beginning in fall, 1999; see Objection 1.5 for full information.*)

IV. Advocacy

1. Promote and celebrate libraries and their contribution to the quality of life and economic growth and development in North Carolina. (*See Objective 1.7 and Objective 3.3 (Very Best Place to Start campaign)*)

Objective 1.2: Libraries have the physical infrastructure to enable them to provide access to networked information for their users. (Evaluation Reporter: Grant Pair)

This objective is in pursuit of the goal of **Enabling All Libraries to Serve as Gateways to Information**, with its Vision for Success that *Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond*. Ensuring that adequate physical infrastructure, including computer hardware, software, and network connectivity, is in place is a necessary first step toward providing access to electronic resources available through the Internet.

Activities to support this objective during the evaluation period (1997-2000):

- The funding of the Basic Equipment Grant (BEG) program to provide libraries with sufficient up-to-date computer workstations, meeting a minimum level of adequacy in both computing power and in number of workstations, as established for the BEG and ECG programs, to ensure adequate access to online electronic resources available through the Internet (including NC LIVE):
 - In 1998, 104 BEGs were awarded: 61 to public libraries, 31 to community college libraries, and 12 to academic libraries.

- In 1999, 23 BEGs were awarded: 9 to public libraries, 11 to community college libraries, and 3 to academic libraries.
- In 2000, 14 BEGs were awarded: 7 to public libraries, 6 to community college libraries, and 1 to an academic library.
- The funding of the Enhanced Connectivity Grant (ECG) program to improve the level and quality of library user access to Internet resources (including NC LIVE). The program's focus includes not only assisting libraries in meeting minimum standards for adequate computer workstations, as established for the BEG and ECG programs, but also enabling them to obtain adequate networking hardware and bandwidth for Internet connectivity as well as equipment for staff and user training in electronic resources.
 - In 1998, 22 ECGs were awarded: 16 to public libraries, 3 to community college libraries, and 3 to academic libraries.
 - In 1999, 12 ECGs were awarded: 10 to public libraries and 2 to community college libraries.
 - In 2000, 5 ECGs were awarded, all to public libraries.
- The maintenance of minimum standards, guidelines and levels of adequacy for user access. During each funding year, the standards for minimum computer equipment purchases were updated to reflect the best *combination* of computing power and purchase price. Levels of adequacy were established in 1997 for purposes of these grant programs and have remained constant.

Information on Outcome Measures and Benchmarks:

What was measured?

Outcome Measure 1.2.1: Number of libraries with appropriate physical infrastructure to support user access to networked information

Benchmark 1.2.1:

Public Libraries:

In July 1997, 134 of 380 public library outlets offered Internet access to the public. Two of the 75 public library systems met minimum adequacy, defined as 1 public access workstation per 5,000 legal service population. Benchmark data is not available for the other Phase 1 NC LIVE libraries.

The Phase 1 NC LIVE libraries include three groups of institutions: public libraries, community college libraries, and public and private academic institutions of higher education. There is indeed no benchmark data for public and private academic institutions. However, partial data are now available for the community colleges that can provide a point of reference for noting improvement. These data were obtained from a combination of unpublished, internal survey information and from public information, provided by the North Carolina Community College System.

Community College Libraries:

As of July 1999, 57 of the 58 community colleges offered Internet access to students in the library on the main campus of each community college.

College Libraries:

With 30 of the 58 colleges reporting, 4 met minimum adequacy, defined as 1 public access workstation for each 100 FTE (full-time equivalent student population). This represents 13.3% of the colleges reporting.

Result as of the end of 2000:

Outcome 1.2.1:

Public Libraries:

In January 2000, 343 of 367 public library outlets (93%) offered Internet access to the public, a 256% increase since 1997. (This information was obtained from a quick response survey of NC public libraries.) As of June 2000, 44 of the 76 public library systems (58%) met minimum adequacy, defined as 1 public access workstation per 5,000 legal service population. This is a 2200% increase since 1997. (This information was obtained from public library statistical reports for 1999-2000.)

Community College Libraries:

As of July 2000, all 58 community colleges offered Internet access to students in the library on the main campus of each community college.

College Libraries:

With 40 of the 58 colleges reporting, 16 met minimum adequacy, defined as 1 public access workstation for each 100 FTE (full-time equivalent student population). This represents 40% of the colleges reporting and a 400% increase in colleges meeting minimum adequacy since 1997.

(This information was obtained from a combination of unpublished, internal survey information and from public information, provided by the North Carolina Community College System.)

Staff observations:

While the ECG program is intended in part to assist libraries in obtaining adequate Internet bandwidth, the State Library does not have satisfactory benchmark data to show the success of this aspect of the ECG. This is quite possibly because there were very few libraries with dedicated (i.e., not dial-up) bandwidth connections in 1997, so the question was not asked when other data were collected. We do have some data for public libraries from January 2000, but because of intensive efforts during 2000 (through LSTA funds, state funds, and the Gates Foundation), the situation in December 2000 was markedly improved even from January of that year. So, with badly outdated data and no benchmark for comparison, we felt it best not to attempt to quantify bandwidth improvement in this report. We are confident, however, that there has been a significant improvement, and within another year

we expect that almost every public library system will have dedicated Internet bandwidth in at least one location, while the great majority will have it in every branch.

Objective 1.3: Libraries have an automated system that meets the minimum standards.

(Evaluation Reporter: Julie Blume Nye)

This objective supports the goal of **Enabling All Libraries to Serve as Gateways to Information**, with its Vision for Success that *Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond.* This objective is based on the assumption that having an adequate integrated online system in each of the state’s libraries is fundamental to assuring adequate access to library resources statewide.

Activities to support this objective during the evaluation period (1997-2000):

- *Automation Planning Grants* of up to \$15,000 for assistance in planning and professional preparation of RFPs for procurement of integrated library management systems offered annually starting in 1998-99
- *Retrospective Conversion Grants* of up to \$50,000 for the conversion of library core/circulating collections, offered annually starting in 1998-99
- *Automated System Grants* of up to \$150,000 for the purchase and installation of integrated library management systems, offered annually starting in 1998-99
- *Planning Mini-Grants* of up to \$10,000—for public libraries—to provide consulting and technical assistance in technology planning, offered annually starting in 1999-2000

The following table indicates the number of grants awarded each year, in each category, and includes grants to academic libraries and public libraries. (Objective #2.1 was specific to automated systems in public libraries; however, report data is provided below. School and special libraries were not eligible to apply.)

	1998-1999	1999-2000	2000-2001
Automation planning grants	11	4	3

Retrospective conversion grants	10	4	2
Automated systems grants	1*	10	6
Technology planning mini-grants (public libraries only)	n/a	2	3

*2 grants awarded in 1998-99 but 1 was relinquished when library could not meet reimbursement timetable; library received and completed an automated system grant in 1999-2000

The following activities were also carried out, in support of the grant programs described above:

- *Minimum Standards for Library Automation in North Carolina* were developed by State Library staff with assistance from three automation consultants outside the state and comments from constituent libraries.
<<http://statelibrary.dcr.state.nc.us/lsta/minstds810.pdf>>
- A *Convenience Contract* was developed through State Purchasing and Contract, effective September 1998-September 2001, which enables libraries to gain expert assistance in automation planning without issuing RFPs and evaluating bids. Three firms were initially selected to participate: RMG Consultants (based in Chicago, IL); Information Partners, Inc. (based in Cleveland, OH) and RB Consulting (based in Cary, NC). Two of these firms continue to make their services available to recipients of automation and technology planning grants and other interested libraries.
- State Library staff conducted research into the *impact of the Y2K bug* on the automated systems already in place in North Carolina libraries. Discussions with LSTA Advisory Committee indicated that special grants to assist libraries in upgrading or replacing their systems would not be necessary.

Information on Outcome Measures and Benchmarks:

What was measured?

Outcome Measure 1.3.1: Number of libraries with automated systems meeting minimum standards

Benchmark 1.3.1: In 1998, 174 of the 186 Phase #1 NC LIVE libraries had an automated system in place. The number of those systems meeting minimum standards is unknown. Six of 75 public library systems had no automated system whatsoever, and 12 others had seriously deficient systems, i.e. lacking one or more core modules. Of the 57 libraries with all three core modules installed (circulation, PAC, cataloging), as many as half were estimated to lack some of the critical functionality described in the minimum standards.

How was it measured?

Combination of personal knowledge, follow-up information from libraries receiving automated systems grants, information available from library web sites and lead agencies, and a quick response survey of public library systems conducted by the State Library in December, 1999

Result as of the end of 2000:

By the end of 2000, 185 of the 187 qualified public and academic libraries had an integrated automated system: 75 of 76 public libraries, and 110 of 111 academic libraries. One of the two remaining libraries is a public library with insufficient local funding; the other is the library for a small, low-wealth private college serving a predominantly minority student body.

It is impossible to know with certainty how many of the systems in the other 187 libraries actually meet the minimum standards, because not all have been formally evaluated against those standards. Of the 111 academic libraries with integrated systems, State Library staff estimate that only four do not meet minimum standards and may not be capable of compliance with the purchase of additional modules.

What else was measured?

Outcome Measure 1.3.2: Percentage of libraries statewide with core collection's bibliographic records in machine-readable form

Benchmark 1.3.2: No data is available. Among the Phase #1 NC LIVE libraries, it appears that retrospective conversion of core collections is largely complete for community colleges, and for all but 6 public libraries. The degree of completion among other academic libraries is unknown.

How was it measured?

As good data are not available, rough estimates must be made based on each library's use of OCLC for cataloging, and information provided in retrospective conversion grant applications.

Result as of the end of 2000:

Among public libraries, 11 of 76 (14%) use OCLC for cataloging; 65 others do not. However, all of the 76 have an online or CD-ROM based catalog, so it may be assumed that most or all of their core collections are in machine-readable form locally, even if their holdings are not in WorldCat. Even the one public library lacking an integrated system has had a long-standing CD catalog, so their collection is probably converted. Three public libraries have systems that are not believed to use full MARC records, so the "transportability" of their records is unknown.

Among academic libraries, the great majority use OCLC for cataloging (see table below for details). As is the case with public libraries, however, all but one of the academic libraries

already have local online catalogs, so their core collections -- at least current years -- may be assumed to be machine-readable. The larger academic libraries -- public and private -- are assumed to have unconverted back files in their circulating collections, though the extent and age of these back files is unknown. Furthermore, it is assumed that most of all libraries' special and other noncirculating collections are largely not converted. Many of these libraries have expressed interest in grants for retrospective conversion of special collections. The four academic libraries whose systems are suspected of non-compliance with minimum standards may not have full MARC records.

	Do not use OCLC	Catalog with OCLC	% using OCLC	Total
Community colleges*	56	2	5 to 95%*	58
UNC system**	1	20	95%	21
Independent college & universities***	6	36	88%	42

* There are 59 community colleges, but only 58 have libraries. Two of the 58 now use OCLC for all cataloging (one uses the online cataloging service, another uses CatExpress; a third will begin using the online cataloging service in 2001). The remaining 56 (soon to be 55) cannot catalog directly on OCLC, but most of them make some use of the centralized ordering and cataloging service offered by the Library Resources Section of the NC Community College System HQ in Raleigh. LRS staff use OCLC for cataloging of items new "to the system", but not for all items purchased at all campuses. When one campus purchases an item already owned by another campus, LRS staff may update the LINCC (the shared OPAC serving 44 of the community colleges) database directly, rather than via OCLC.

** There are 16 campuses in the UNC system, plus the NC School of Science and Mathematics (NCSSM). On 3 of the 16 campuses, there are two more independently administered libraries, each responsible for its own cataloging (UNC-Chapel Hill: Main, Law, Health Sciences; NCCU: Main, Law; ECU: Main, Health Sciences).

***There are 36 members of North Carolina Independent Colleges and Universities. Three of the 36 have more than one independently administered library on campus, each responsible for its own cataloging (Duke: Main, Medical, Law, Business; Campbell: Main, Law; Wake Forest: Main, Medical, Professional Center).

Among the qualified public and academic libraries, it appears that retrospective conversion of core collections is largely complete for community colleges, and for all but 6 public libraries. The degree of completion among other academic libraries is unknown.

Staff observations:

The numbers cited above indicate clear progress toward achieving the objective. In terms of outcome measure 1.3.1, prospects for further improvement are fairly clear—the major barrier is lack of local funding, or lack of interest on the part of local administrators.

Objective 1.4: Library staff members in all types of libraries have the needed skills, knowledge, and abilities to integrate the use of technology into the delivery of library services. (Evaluation Reporter: Elaine Christian)

This objective supports the goal of **Enabling All Libraries to Serve as Gateways to Information**, with its Vision for Success that *Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond*. This objective responds to a continuing need expressed in a variety of needs assessment activities--that library staff members believe that continuing education and training are a high priority to aid them in integrating technology into the delivery of library services and to provide users with the full range of electronic and print resources available.

Activities to support this objective during the evaluation period (1997-2000):

- Funding a continuing education program of technology-related workshops to help library staff in all types of libraries integrate the use of technology into the delivery of library services. A separate program of workshops to train library staff in the use of NC LIVE resources was also funded. During the evaluation period, a total of 154 technology-related workshops were sponsored. Seventy of these sessions were part of the NC LIVE training program.
- Initiating the Master Trainer Program to increase the ability of local library staff to conduct effective internal training for library staff with a focus on technology: The Master Trainer Project began in 1998 as a demonstration project with staff members from 12 public libraries. In Spring 1999, 22 Master Trainers – 11 each from the academic and public library sectors – joined the program. New Master Trainers were not recruited during FY 1999-2000. Rather, the State Library increased its support of the Master Trainer network through monthly conference calls where the trainers consulted and coached each other, an electronic discussion list, and a two-day skills “refresher” meeting.

As of December 2000, the Master Trainers represented 27 libraries across the state – 8 academic institutions and 19 public libraries. Of the 34 individuals who completed the training program, seven were no longer active with the group – one moved out-of-state, one is now employed in a training capacity in private industry, three accepted employment with no training responsibilities in other libraries, and two have left the library field.

Information on Outcome Measures and Benchmarks:

Outcome Measure 1.4.1: Number of workshops offered

Benchmark 1.4.1: In FY 1997-98, 60 technology-related workshops were offered.

What was measured?

The number of technology-related continuing education workshops offered.

<i>FY</i>	<i>No. of Training Sessions</i>
1997-1998	60
1998-1999	47
1999-2000	28
Fall 2000	19
Total	154

How was it measured?

Counting the number of sessions listed in workshop brochures & announcements on file.

Result at the end of 2000:

From 1997 - 2000, 154 technology-related training sessions were sponsored.

Outcome Measure 1.4.2: Number of staff trained

Benchmark 1.4.2: In FY 1997-98, 1,093 library staff attended State Library-sponsored technology-related training.

What was measured?

Number of library staff trained

<i>FY</i>	<i>No. of staff trained</i>
1997-1998	1,093
1998-1999	504
1999-2000	469
Fall 2000	408
Total	2,474

How was it measured?

By reviewing the workshop registration files

Result at the end of 2000:

As of December 2000, 2,474 library staff attended State Library-sponsored technology related training sessions.

Outcome Measure 1.4.3: Existence of competency models that describe knowledge, skills, and abilities that library staff members must have to use technology in their library's services and programs.

Benchmark 1.4.3: No models have been developed.

What was measured?

Whether a model existed

Result at the end of 2000:

No progress was made on identifying competency models.

Outcome Measure 1.4.4: Percentage of NC LIVE libraries with staff who have the needed skills to provide user access to NC LIVE

Benchmark 1.4.4: Slightly more than half (51%) of the 186 NC LIVE libraries report having staff without the necessary skills to provide user access to NC LIVE.

What was measured?

Percentage of NC LIVE libraries with staff who have the needed skills to provide user access to NC LIVE

How was it measured?

Analysis of results of a follow-up survey of Fall 2000 workshop participants

Result at the end of 2000:

Six weeks after the completion of the Fall 2000 sessions, 54% of the attendees responded to a follow-up survey. As a result of their participation in the workshops, 84% said that they had incorporated new searching skills into their work assignments. 96% of the respondents indicated that they had improved their knowledge of search strategies for NC LIVE resources. The same percentage indicated that they were satisfied with the long-term benefits of the NC LIVE training sessions. A re-survey of NC LIVE libraries would be needed to determine the percentage of staff with the needed skills to provide user access to NC LIVE.

Staff observations:

- Overall, fewer continuing education workshops on basic and introductory topics are being conducted and more advanced topics are being covered. This trend should increase as more Master Trainers are trained to assist individual libraries in enhancing their staff development programs.
- The gap in the level of staff technology expertise between the larger and smaller libraries, especially within the UNC-system, and in the private academic community, continues to widen. Increasing the number of Master Trainers at these institutions may be one strategy to address this disparity.
- It has been difficult to get academic libraries to view the State Library as a credible provider of technology-related training services. One successful continuing education program was the LITA Regional Institute: Database-Driven Web Sites co-sponsored by the State Library and NCLA's Technology and Trends Round Table in Fall 2000. Of the

111 attendees, 64% were from academic institutions. Exploring partnerships with similar organizations may help increase participation in State Library-sponsored continuing education programs by academic library staff in the future.

Objective 1.5: All libraries have accurate, complete bibliographic and holdings information in the North Carolina Union Catalog, a subset of OCLC's WorldCat.

(Evaluation Reporter: Julie Blume Nye)

This objective supports the goal of **Enabling All Libraries to Serve as Gateways to Information**, with its Vision for Success that *Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond*. This objective continues the effort to assure that all libraries have electronic records for their collection and that those records are included in the state's union catalog. Both are essential to providing access to the collections held by our state's libraries.

Activities to support this objective during the evaluation period (1997-2000):

- Statewide Leadership Grant awarded in 1998-99 with funds to cover batchloading costs for selective user libraries: \$450,000 was initially appropriated; subsequently an additional \$450,000 was made available.
- During 1998-99, the collections of 14 public libraries were batchloaded. (Eight of those libraries have subsequently completed their first batchload update, at the library's expense, and one has converted to full membership in OCLC and now catalogs online.) A total of 1.3 million holdings were added to WorldCat in 1999, at an approximate cost of \$140,000.
- Also in 1999, the CCLINC shared catalog of 42 community college libraries was batchloaded, adding 700,000 holdings at a cost of \$100,000. (Several additional community colleges have subsequently joined CCLINC; their holdings have or will be added to OCLC via batchloading, with ongoing cataloging using OCLC.)
- In 1999-2000, holdings were batchloaded for six libraries who completed LSTA-funded retrospective conversion projects. A total of 170,000 holdings were added at an approximate cost of \$35,000.
- In 1999-2000, 24 additional public libraries, community colleges and private colleges were invited to participate in batchloading. Twelve libraries' holdings were actually loaded, adding more than 600,000 new holdings to OCLC. Two of these have now completed a batchload update. Several of the non-participants from this round have asked to be included during 2001-02.
- In late 1999, Julie Nye was appointed SOLINET's representative to the OCLC Resource Sharing Advisory Committee. State Library staff actively monitor the status of services

for batchloading serials holdings information, and advocate for the development of such services, as well as for pricing that would make statewide participation feasible.

- Staff also continue to monitor status of OCLC services available to help small libraries enter and maintain holdings (i.e., CatExpress) and fund projects to facilitate library participation as appropriate (e.g., continuing education, information, and technical assistance).

Information on Outcome Measures and Benchmarks:

What was measured?

Outcome Measure 1.5.1: Percentage of NC libraries either with ongoing OCLC cataloging or batchloading to OCLC at least biennially

How was it measured? State Library batchloading project records, plus information about OCLC membership status available online and in State Library's invoicing system

Benchmark 1.5.1: In 1998, 57 of the 186 NC LIVE Phase #1 libraries used OCLC for ongoing cataloging and 1 selective user batchloaded, for a total of 58/186 or 31%.

Result as of the end of 2000:

At the end of 2000, 59 libraries used OCLC for ongoing cataloging and 87 selective users batchloaded, for a total of 146/188 or 77%.

	1998	2000
Selective user - no batchload	129	42
Selective user w/ batchloading	1	87
Using OCLC for ongoing cataloging	57	59
Total target	58	146
Total NC LIVE libraries	186	188
Percent meeting target	31%	77%

What else was measured?

Outcome Measure 1.5.2: Percentage of North Carolina libraries with holdings in the Online Union List of Serials updated at least annually

How was it measured?

Information from State Library staff who coordinate entry of selective user holdings

Benchmark 1.5.2: In 1998, 44%, or 178 libraries, of the more than 400 OCLC users in North Carolina have at least some holdings in the serials union list.

Result as of the end of 2000:

There has been no appreciable change in this number.

Outcome Measure 1.5.3: Increase in lending by North Carolina selective user libraries

How was it measured?

ILL statistics (lending and borrowing counts from the OCLC ILL system) aggregated by State Library from monthly invoicing system.

Result as of the end of 2000:

Between 1998/1999 and 1999/2000, the first year during which most batchloaded holdings were added to the OCLC database, lending by all selective users increased 29%. Lending by selective users who participated in batchloading projects increased 105% during the same period.

Borrowing by all selective users dropped slightly (5%) while borrowing by libraries that batchloaded increased slightly (1%), but this difference may not be significant.

During the first half of 2000/2001, libraries who batchloaded were the only group to show an increase in lending, albeit very small. Lending by all selective users and borrowing by both groups were slightly down.

	1998/1999 (no batchloading)	1999/2000	2000/2001 (projected based on first 6 months)
BORROWING			
By all selective users	45544	43126	41470
Change from previous year (projected for 00-01)		5% decrease	4% decrease
By selective users who batchloaded	20598	20723	19860
Change from previous year (projected for 00-01)		1% increase	4% decrease
LENDING			
By all selective users	12000	15473	15324
Change from previous year (projected for 00-01)		29% increase	1% decrease
By selective users who batchloaded	4951	10164	10310
Change from previous year (projected for 00-01)		105% increase	1% increase

Another indicator of the increase in lending is the number of net lenders. Of the selective user libraries whose holdings were batchloaded, 5 were net lenders in 1998/99, 7 were net lenders in 1999/2000, and 9 are net lenders so far in 2000/2001. (No data are available on the total number of net lenders among selective users, or of net lenders among full users of the OCLC ILL system.)

Other than the 1998-99 numbers noted above, no earlier data are available.

Staff observations:

Batchloading was essentially halted when Julie Nye was named Acting Chief of Library Development in April, 2000. There are still roughly 100 public and small academic libraries whose holdings have not been batchloaded. Batchloading is a complicated process and has proved to require significant amounts of "hand-holding" from State Library staff. Of the alternative strategies for achieving this objective, converting selective users to online cataloging appears to be the most immediately productive approach.

Objective 1.6: Develop and implement a plan for making unique North Carolina resources accessible to North Carolina residents and to scholars and researchers throughout the world. (Evaluation Reporter: Kevin Cherry)

This objective is in pursuit of the goal of **Enabling All Libraries to Serve as Gateways to Information**, with its Vision for Success that *Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond.* This objective was added as an outgrowth of the development of the plan for interlibrary cooperation (see Objective 1.1)

The plan's strategic direction to expand access to holdings of museums, archives, and other important special collections recognizes that some of the greatest research resources held by North Carolina's cultural institutions were not readily accessible. Because of the unique nature of these resources and their special preservation needs, access to these materials traditionally has been quite limited. Each repository often maintains a locally created collection management tool, which may be available only at the library. New technologies promise to provide greater access to the special materials held by the state's libraries by

- promoting the interaction between collection management tools
- providing digital duplicates to users at a distance
- allowing for better preservation of fragile originals
- making "virtual" connections between separated originals

All these activities enhance the ability of libraries to serve as gateways to information.

Activities to support this objective during the evaluation period (1997-2000):

- As the State Library Commission's Interlibrary Cooperation Committee completed its work on *Building Communities*, it formed a Work Group to begin planning for implementation of a portion of one of the strategic directions, which was to provide access via the Internet to

special collections in libraries, archives, and museums. The Access to Special Collections Work Group (ASCWG) was appointed to include representative libraries, archives, and museums.

- The ASCWG developed a Statewide Leadership Grant application that resulted in the following series of activities in 1999-2000:
 - In the fall of 1999, the completion of a test survey (via onsite interviews) in Buncombe and Rowan Counties, which included 57 cultural repositories. These test surveys, along with the advice of a national expert in the field, as well as that of representatives from the various types of institutions to be surveyed, led to the development of a revised survey instrument in Summer 2000.
 - A Statewide Leadership Conference on Access to Special Collections, which was held in March 2000, bringing together approximately 100 representatives of the state's "cultural communities of interest"—librarians, archivists, museum professionals, and representatives of local history groups—to identify and implement priorities for action
 - The creation and dissemination of a vision and a strategic plan, including guiding principles to reach that vision: The document was completed in August, 2000. [Part IV – C (Supporting Materials: Access to North Carolina's Special Collections: Vision, Principles, and Strategic Directions)]
- A full-time project director was hired as a Library Development Consultant, in a state-funded position, in Summer 2000.
- The second Statewide Leadership Grant resulted in the following activities:
 - The survey plan was completed, incorporating into the survey process strategies to address the need for onsite consulting, better awareness of the collections within the communities they serve, and the stronger collaboration between cultural repositories of different types.
 - Two staff—a librarian and an archivist—were hired to implement the survey plan.
 - In the Fall of 2000, the creation of a prototype Web portal that features the digitized resources of libraries, archives, museums, and historical societies across the state, while providing information to all of the state's repositories (approximately 633 institutions) whether or not they maintain digitized resources. (www.ncecho.org)
 - The development of an extensive first draft Web document, "Guidelines for Digitization" <<http://statelibrary.dcr.state.nc.us/asc/Guide/index.htm>> which was distributed for review by a number of stakeholders statewide.

- Work began on a communications plan to help build awareness of the project and its portal among the state's cultural institutions and the individuals they serve, with the creation of drafts of logos, project names, and taglines.
- In October 2000, co-sponsored a workshop on digitization with the North Carolina Library Association's Round Table on Special Collections, the North Carolina Preservation Consortium, and the Federation of North Carolina Historical Societies to provide basic information and training for those institutions considering digitization. The workshop also helped inform the project's planners concerning future continuing education for digitization. Forty-one individuals attended.
- Funding of three demonstration subgrants:

1) Land of the Sky Demonstration Project

A collaboration of four public institutions, including the Special Collections in D. H. Ramsey Library at the University of North Carolina at Asheville (UNCA), Asheville Buncombe Library System (ABLS), YMI Cultural Center (YMICC), and Asheville Art Museum (AAM), this project is building a digital repository of core information by and about ethnic minorities in Western North Carolina. The partners are focusing on the digitization of African American holdings as the first phase of the effort and will expand their focus to include additional diverse populations as the project progresses. This pilot strives to model a collaborative and educational digitization project that small to mid-sized communities may wish to emulate.

2) WebQuest Demonstration Project

The North Carolina Department of Public Instruction's WebQuest Demonstration Project seeks to instruct teachers in the creation of WebQuests, a tool, which re-purposes Internet materials for use in the classroom. <<http://edweb.sdsu.edu/webquest/overview.htm>>. The WebQuests generated by this project will concentrate on digital collections of North Carolina information and artifacts and will use the "train the trainer" approach, allowing participants to more effectively share their WebQuest creation skills with their colleagues.

3) North Carolina State Archives/Duke University Estate Records Demonstration Project

The North Carolina State Archives and Duke University's Perkins Library's Estate Records Demonstration Project models the creation of appropriate metadata, seeks to demonstrate the successful cooperation between cultural institutions of two distinct types, and models the linking of large amounts of digital images to appropriate access tools that have been modified for the Web. In this process, the State Archives and Duke University will digitize from microfilm approximately 30,000 images of colonial era North Carolina estate records, making them available online.

Information on Outcome Measures and Benchmarks:

For **Benchmark 1.6.1:** Plan is completed by September 30, 1999 and includes appropriate outcomes and measures to assist in evaluating progress in 1999-2000.

What was measured?

The effectiveness of a plan for a statewide, collaborative program for access to North Carolina's special collections

How was it measured?

Measurement of the effectiveness of the plan occurred during its development.

- The Statewide Leadership Conference on Access to Special Collections evaluated the early efforts of the Access to Special Collections Work Group (ASCWG) through group discussions and breakout sessions, as well as providing input on next steps for the project
- A “plus/delta” debriefing of ASCWG members following the conference evaluated the effectiveness of the conference and the next steps for the project that were proposed during the conference.
- The survey instrument was evaluated informally by those representatives of institutions being surveyed, some representatives of institutions to be surveyed (primarily museums) and a national expert.
- Attendees to the Statewide Leadership Conference on Access to Special Collections were given approximately six months to test and evaluate the prototype Web portal, and give suggestions for its improvement.
- A fifty-member Board of Readers composed of representatives of North Carolina's different types of cultural repositories critiqued the “Guidelines for Digitization Document.”
- Those attending the Digitization Workshop provided evaluation of the day-long program.

Result as of the end of 2000:

As of September 2000, the Access to Special Collections Project had a strategic plan to create a statewide, collaborative program for access to North Carolina's special collections. It had developed this plan by seeking the input of representatives from a broad cross-section of North Carolina's cultural repositories, testing key portions of the proposed plan as it developed, and inviting the critique and criticism of experts, as well as potential partners and participants in the project.

Staff observations:

While the plan for access to special collections was not completed by the deadline established by the LSTA plan, the creation of it did involve input from a great many more

cultural repositories than first envisioned. Also, each subsection of the plan (survey, guidelines document, etc.) was investigated through test runs or demonstration projects with feedback from participants. In addition, the scale of the project affected the deadline. Simply creating the master Web directory of the 633 cultural repositories in the state (a project that had never been undertaken before) was major and resulted in the first comprehensive directory and guide to North Carolina cultural repositories.

Because of the collaborative and broad-based nature of the project, any plan for greater access to special collections must remain flexible and responsive to its many potential partners.

Objective 1.7: Libraries have an effective statewide program of marketing and communications to inform the public about the role that libraries play in providing access to networked information. (Evaluation Reporter: Timothy Owens)

This objective is in pursuit of the goal of **Enabling All Libraries to Serve as Gateways to Information**, with its Vision for Success that *Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond*. In order for libraries to effectively serve as gateways to information, the public needs to be informed of the information resources and services that are available.

While Key Strategies for 1999-2002 were to fund a Statewide Leadership grant for market research in 2000 and develop a communications plan in 2000-2001, these strategies were postponed to allow the State Library's major marketing and communications initiative for library services to youth (Libraries: The Very Best Place to Start, see Objective 3.3) to serve as a pilot project. As the strategies for both projects are parallel, success appeared more likely by beginning with the youth services segment and subsequently building on that to develop a marketing and communications initiative for the libraries' community at large.

Staff observations:

No benchmarks were established for this objective, but consideration should be given to establishing baseline measures with public opinion research to be followed up after planning and implementation of a marketing initiative. As plans are developed for the broader marketing and communications effort, it will be important to learn from the current implementation of the Very Best Place to Start.

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**North Carolina LSTA Goal #2:
Achieving Equity in Public Library Service**

Vision for Success: Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide.

Objective 2.1: All 75 public library systems have an automated system that meets minimum standards. (Evaluation Reporter: Julie Blume Nye)

The report for this objective is found with Objective 1.3: Libraries have an automated system that meets the minimum standards.

Objective 2.2: Every public library outlet in North Carolina provides adequate public access to the Internet. (Evaluation Reporter: Grant Pair)

This objective is in pursuit of the goal of **Achieving Equity in Public Library Service**, with its Vision for Success that *Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide*. Provision of Internet access to patrons is critical in making available a wide range of remote electronic resources, including NC LIVE.

Activities to support this objective during the evaluation period (1997-2000):

- The funding of the Basic Equipment Grant (BEG) program to provide libraries with sufficient up-to-date computer workstations, meeting a minimum level of adequacy in both computing power and in number of workstations, as established for the BEG and ECG programs, to ensure adequate access to online electronic resources available through the Internet (including NC LIVE):
 - In 1998, 104 BEGs were awarded, including 61 to public libraries
 - In 1999, 23 BEGs were awarded, including 9 to public libraries
 - In 2000, 14 BEGs were awarded, including 7 to public libraries
- The funding of the Enhanced Connectivity Grant (ECG) program to improve the level and quality of library user access to Internet resources (including NC LIVE): The program's focus includes not only assisting libraries in meeting minimum standards for adequate computer workstations, as established for the BEG and ECG programs, but also enabling them to obtain adequate networking hardware and bandwidth for Internet connectivity as well as equipment for staff and user training in electronic resources.
 - In 1998, 22 ECGs were awarded, including 16 to public libraries
 - In 1999, 12 ECGs were awarded, including 10 to public libraries
 - In 2000, 5 ECGs were awarded, all to public libraries.
- The maintenance of minimum standards and guidelines for user access: During each funding year, the standards for minimum computer equipment purchases were updated to reflect the best combination of computing power and purchase price.

Levels of adequacy were established in 1997 for purposes of these grant programs and have remained constant.

Information on Outcome Measures and Benchmarks:

Benchmark 2.2.1: In July 1997, 134 of 380 public library outlets offered Internet access to the public. Two of the 75 public library systems met minimum adequacy, defined as 1 public access workstation per 5,000 legal service population.

Outcome 2.2.1: In January 2000, 343 of 367 public library outlets (93%) offered Internet access to the public, a 256% increase since 1997. (This information was obtained from a quick response survey of NC public libraries.) As of June 2000, 44 of the 76 public library systems (58%) met minimum adequacy, defined as 1 public access workstation per 5,000 legal service population. This is a 2200% increase since 1997. (This information was obtained from public library statistical reports for 1999-2000.)

Staff observations:

While the ECG program is intended in part to assist libraries in obtaining adequate Internet bandwidth, the State Library does not have satisfactory benchmark data to show the success of this aspect of the ECG. This is quite possibly because there were very few libraries with dedicated (i.e., not dial-up) bandwidth connections in 1997, so the question was not asked when other data were collected. We do have some data for public libraries from January 2000, but because of intensive efforts during 2000 (through LSTA funds, state funds, and the Gates Foundation), the situation in December 2000 was markedly improved even from January of that year. So, with badly outdated data and no benchmark for comparison, we felt it best not to attempt to quantify bandwidth improvement in this report. We are confident, however, that there has been a significant improvement, and within another year we expect that almost every public library system will have dedicated Internet bandwidth in at least one location, while the great majority will have it in every branch.

Objective 2.3: Public libraries provide appropriate services and resources for North Carolina's rapidly increasing Hispanic community. (Evaluation Reporter: Robert Burgin)

This objective is in pursuit of the goal of **Achieving Equity in Public Library Service**, with its Vision for Success that *Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide*. This objective is motivated by the rapid growth of the Hispanic population in the state. In addition, with the withdrawal of federal funding for the Foreign Language Center, public libraries in the state agreed that each library should take responsibility for establishing library service to its Hispanic population because of the changing demographics. At that time, the State Library made a commitment to assist libraries in developing those services.

Activities to support this objective during the evaluation period (1997-2000):

- Funding of the first two years (1999-2000, 2000-2001) of a proposed three-year State Leadership Grant for a Hispanic Services Project
- Establishment of a Hispanic Services Advisory Committee to provide expertise and community input on various aspects of the project and to provide a model for how best to conduct community outreach by involving members of the target community: Members of the committee represent individuals involved in services to Hispanics through community groups and public librarians who provide services to Hispanic communities. The Committee met three times in 1999-2000 and has met once in 2000-2001.
- Contract with market researcher Dr. Edward Rincon to gather data and conduct a demographic analysis of the Hispanic community in North Carolina: Dr. Rincon's survey is available on the Web at <http://statelibrary.dcr.state.nc.us/hispanic/survey.htm>.
- Provision of three workshops for public librarians in building community relationships and assessing the needs of their Hispanic communities: These workshops were conducted by project consultant Yolanda Cuesta in May 2000 and attended by 88 public and academic library staff members representing 51 libraries.
- Funding of a mini-grant program to help public librarians conduct appropriate needs assessment activities in their Hispanic communities: In 2000, twelve grants were awarded for a total of \$69,689. A list of awarded grants is available on the Web at http://statelibrary.dcr.state.nc.us/lsta/AwardsPPHisp00_01.htm.

Information on Outcome Measures and Benchmarks:

Benchmark 2.3: Currently, there is no consistent statewide strategy for strengthening library services to the state's Hispanic population nor do the majority of libraries in the state have any significant experience or expertise in this area. This objective is designed to create a statewide strategy and assist libraries in gaining the expertise they require.

Outcome Measure 2.3.1: Plans and guidelines developed in consultation with stakeholders

What was measured?

Activity of the Hispanic Services Advisory Committee in providing expertise and community input on various aspects of the project

How was it measured?

Number of meetings of the Committee and ways in which their input was sought

Result as of the end of 2000:

The Committee met three times in 1999-2000 and provided feedback on the following:

- the project plans, as reflected in the Statewide Leadership Grant proposal for year 2;

- the content of the May 2000 workshops;
- the plans for the demographic analysis conducted by Dr. Edward Rincon in February 2000; and
- the fourteen mini-grant applications submitted in June 2000.

Outcome Measure 2.3.2: Continuing education and training provided for public library community

What was measured?

The number of training opportunities provided and the number of staff and libraries participating

How was it measured?

Count of participation at May 2000 workshops

Result as of the end of 2000:

Attended by 88 public and academic library staff members representing 51 libraries.

Outcome Measure 2.3.3: Number of public libraries providing services that meet guidelines

What was measured?

The number of applications and awards for mini-grants to help public librarians conduct appropriate needs assessment activities in their Hispanic communities.

How was it measured?

Receipt of grant applications by the State Library of North Carolina
Number and dollar amount of awards approved by LSTA Advisory Committee

Result as of the end of 2000:

Fourteen grant applications were submitted. Twelve grants were awarded for a total of \$69,689.

Staff observations:

The key strategies for Objective 2.3 have all been successfully implemented, except for the development of guidelines for the provision of appropriate library services to Hispanic communities. The State Library hopes to develop such guidelines as part of its 2001-2002 Hispanic Services project. In addition, continuing education in the development and marketing of services to Hispanic communities will be provided in 2001-2002, and grants for the development and marketing of services are planned.

The efforts in this area have also highlighted the need to provide training and guidelines for the development of appropriate services and resources for other ethnic communities.

Objective 2.4: Public Library managers have the resources and skills they need to plan and evaluate library services. (Evaluation Reporter: Anne Marie Elkins)

The objective is in pursuit of the goal of **Achieving Equity in Public Library Service**, with its Vision for Success that *Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide*. Skill in the planning and evaluation of library services is seen as necessary to ensure quality library services with statewide consistency.

Activities to support this objective during the evaluation period (1997-2000):

- Funding of a mini-grant program to provide consulting and technical assistance in planning to public libraries
 - In 1999, 4 grants were awarded: 2 for general planning and 2 for technology planning.
 - In 2000, 6 grants were awarded: 3 for general planning and 3 for technology planning.
- Provision of continuing education and technical assistance to support local planning efforts and preparation of technology plans
 - In 1999, Sandra Nelson, a nationally known planning consultant, presented a workshop based on the 1998 edition of *Planning for Results* for approximately 50 public library directors. This presentation was used as a kick-off to announce the availability of the planning mini-grants.
- Continued participation in efforts to develop measures of effectiveness for electronic library services
 - The State Library of North Carolina participated in the Bertot project to develop standardized measures of library electronic services.

Information on Outcome Measures and Benchmarks:

Benchmark 2.4.1.1: Every public library system annually revises a long-range plan of service in order to qualify to receive state funding.

As of December 31, 2000, all 76 public library systems in North Carolina had provided the State Library with acceptable long-range plans of service sometimes referred to colloquially as 5-year plans. The requirement that a long-range plan be submitted to the State Library in order to receive State Aid is included in the North Carolina General Statutes. The State

Library verifies that the requirement has been met before awarding State Aid dollars to any public library system.

Benchmark 2.4.1.2: In the past 5 years, 6 public library systems have undertaken comprehensive planning and assessment projects.

When the current LSTA Plan was implemented in 1997, the State Library staff determined that in the previous 5 years (1991-1996), there had been 6 public library systems that had undertaken a comprehensive planning process. Since the planning mini-grants have been offered beginning in 1999, 5 more libraries have done long-range planning and 5 additional libraries have undertaken comprehensive technology planning.

Benchmark 2.4.2: In 1998, 66 public libraries had provisional plans approved by the State Library in order to qualify for telecommunications discounts.

In 1998, in order to qualify for an E-Rate discount, public libraries were required to have technology plans approved by the State Library. As of December 31, 2000, the State Library still had 66 approved plans on file.

Benchmark 2.4.3: The State Library is participating in a national project to identify appropriate measures for libraries to use in assessing the effectiveness of their electronic library services.

Results of the State Library's participation in the national Bertot study were used in developing *Statistics and Performance Measures for Public Library Network Services* by Bertot, McClure, & Ryan (published in October 2000 by ALA). Initial funding for the State Library's participation came from LSTA funds.

Outcome 2.4.1: All public libraries have current plans revised within the past five years.

While it is true that all 76 public library systems do indeed have current plans revised within the past 5 years—indeed *revised* within the past year—these plans are of varying quality. In many cases, the plans are done merely to fulfill the requirement that libraries must have one in order to receive money from the Aid to Public Libraries Fund.

However, in the last 2 years, 10 libraries have indeed undergone extensive planning—both general and technological—because of the awarding on the planning mini-grants.

Outcome 2.4.2: All public libraries have technology plans that meet established guidelines. Out of 76 library systems, 66 currently have approved technology plans on file at the State Library. We have these technology plans because the federal E-Rate program requires that libraries submit one.

Outcome 2.4.3: Network statistics and performance measures are available to assist public libraries in evaluating the delivery of services in a networked environment.

Since the Bertot manual has just been released, it is premature to evaluate its success. This manual, *Statistics and Performance Measures for Public Library Network Services*, should be considered in our other efforts relating to collection of public library statistics.

Staff observations:

While the outcome measure (2.4.1) of every public library system in North Carolina having a long-range plan for library service has been met, the plans submitted exhibit a broad range of quality, suggesting a continuing need to improve the skills of public library managers in planning and evaluation.

The outcome measure (2.4.2) of all public libraries having technology plans has not yet been met. The 66 plans we have are a result of E-rate requirements. The State Library may need to consider additional strategies to meet the objective of all public libraries having technology plans that meet established guidelines.

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**North Carolina LSTA Goal #3:
Libraries as Leaders for Children and Teens**

Vision for Success: With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.

Background on the development of Goal #3:

During 1998-99, the State Library Commission's Advisory Committee on Library Services to Children and Youth worked on an assessment and planning project. The process was designed to learn more about the status of library service to North Carolina's young people, to bring together key stakeholders to review the research findings, and to make recommendations about priorities for library services to youth for the coming five years. A strategic plan on Library Services for Children and Teens was developed. **As a result of the preliminary work Goal # 3 was added to North Carolina's LSTA plan.**

The State Library staff worked with the Advisory Committee, independent consultants, and stakeholders from across the state to complete the following preliminary activities:

Fall 1997: Conducted a literature search on current practices and trends in library services to children and young adults as background information for the committee.

Winter/Spring 1998: Working with independent consultants and State Library staff, conducted surveys to assess current public and school library services to children and young adults in NC. From the public school media center surveys 57 out of 117 school systems responded. From the public libraries surveyed, 291 out of 350 responded.

Also contracted for opinion research to assess public attitudes toward library services to North Carolina's children and teens. Focus groups were held in September 1998, and a statewide poll was conducted in January 1999.

Fall 1998: Held a two-day invitational leadership conference seeking input from key members of the library community and other stakeholders on the results of the assessment of current library services to children and young adults in NC. 71 representatives from the school and public library community, as well as library educators, teachers, and children's authors attended the conference.

Winter/Spring 1999: Based on the data gathered, the Youth Services Advisory Committee drafted a "Strategic Plan on Library Services to Youth" for statewide library development strategies including grants and continuing education.

Spring 1999: Draft plan was reviewed at regional meetings of school and public library representatives. 175 school media specialists and public librarians participated in the regional meetings.

In Spring 1999 the State Library recruited a public relations and marketing firm to assist in developing a campaign based on the findings of the opinion research.

Summer 1999: State Library Commission adopted the final plan titled *Powerful Partners*.

The vision of the strategic plan focuses on libraries' and librarians' taking a leadership role in working with their communities to assure that every child and teen in North Carolina learns to read, loves to learn, and has access to the world.

Objective 3.1: Children and teens receive services strengthened by collaboration of agencies in their community. (Evaluation Reporter: Ron Jones)

This objective is in pursuit of the goal of **Libraries as Leaders for Children and Teens** with its Vision for Success that *With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.* Through partnerships with organizations that share an interest in the needs of a community's young people, librarians can serve as leaders in services for children and teens. Those partnerships will not only build stronger support for those young people but will also give the library added visibility in the community.

To develop the leadership and collaboration skills of librarians a series of workshops and grant opportunities were developed. The process was a three-stage effort:

- 1st A basic workshop to build collaboration/leadership skills was offered to all school and public librarians across the state.
- 2nd Participants in the Collaboration Basics Workshop were eligible to apply for competitive mini-grants to attend an Advanced Collaboration Workshop on team building and collaboration.
- 3rd Participants in the Advanced Workshop were eligible to apply for competitive LSTA Powerful Partners Youth Services Collaboration Grants to fund full projects addressing a specific community need for youth

Activities to support this objective during the evaluation period (1997-2000):

- September 1999: Working with an independent consultant, Elizabeth Curry, State Library staff designed a workshop to strengthen leadership/collaboration skills of school media specialists and public librarians
- November 1999 – January 2000: Six Powerful Partners Collaboration Basics Workshops presented across the state. Over 325 school and public librarians participated and were eligible to apply for a Powerful Partners Collaboration Mini-Grant.
- Fall 1999: Powerful Partners Mini-Grant Applications were available to participants from the Powerful Partners Collaboration Basics Workshops. The grants of \$1000 were for local planning activities and to cover expenses for a three-member team to attend advanced collaboration and team-building training. 21 applications were received.
- December 1999: 21 Powerful Partners Collaboration Mini-Grants are awarded to public and school libraries
- March 2000: 20 libraries' three-member teams participate in the Powerful Partners Advanced Collaboration Workshops to draft a preliminary proposal addressing a specific need of youth in their respective communities.
- June 2000: 18 LSTA Powerful Partners Collaboration Grants are submitted to the State Library with a total request of \$523,320.
- July 2000: 13 LSTA Powerful Partners Collaboration Grants funded at \$344,824.
- September 2000: A repeat of Two LSTA Powerful Partners Collaboration Basics Workshops conducted with 60 participants from school and public libraries. Again, all participants were eligible to apply for an LSTA Powerful Partners Collaboration Mini-Grant to attend Advanced Training in January 2001.
- December 2000: 14 applications are received and 9 LSTA Powerful Partners Collaboration Mini-Grants awarded to cover expenses for pre-planning and attendance of team-members at the Advanced Workshop in January 2001.

Information on Outcome Measures and Benchmarks:

Outcome Measure 3.1.1: The percentage of each public library systems' outlets that have collaborated with schools, daycare centers, Head Start and Smart Start programs, and other child-related agencies.

Benchmark 3.1.1: In 1998, 69% of public library outlets collaborated with schools, 63% with day care centers, and 36% with Head Start programs.

No follow-up has been done since the initial research in 1998. The impact/success of the workshops and grants will be demonstrated in the evaluation of the first round of full LSTA Powerful Partners Collaboration Grants in 2001.

There has been some evidence of the language/principles of true collaboration from the workshops appearing in LSTA grant applications in other categories. Grant reviewers for other LSTA grant categories have observed an obvious understanding among applicants of the importance of community partnership and collaboration and the specific use of language modeled in the Powerful Partners Workshops.

Objective 3.2: Children and teens receive library services that are based on long-range community-based plans. (Evaluation Reporter: Penny Hornsby)

This objective is in pursuit of the goal of **Libraries as Leaders for Children and Teens** with its Vision for Success that *With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.* Having in place strong long-range community-based plans for library services for children and teens is a fundamental component to achieving the vision.

Activities to support this objective during the evaluation period (1997-2000):

- Funding of a Planning Mini-Grant program to provide consulting and technical assistance to assist public libraries in planning, including developing long-range community-based plans for services to youth

During 1999 and 2000, 10 grants were awarded—five (5) grants for general planning for programs and services, and 5 for technology planning. No applications were received to develop community-based plans for youth services.

Information on Outcome Measures and Benchmarks:

Outcome Measure 3.2.1: Number of library systems with a long-range community-based plan that includes youth services

In 1998, 68% of public library systems had a long-range plan that included goals and objectives for youth services. Updated information has not been gathered to determine whether this percentage has changed. Of the two libraries receiving grants for general planning in 1999, both projects incorporated objectives and activities addressing services to children and teens. The 2000-2001 projects are not yet complete.

Outcome Measure 3.2.2: Number of public library outlets with a long-range community-based plan that includes youth services

In 1998, 10% of public library outlets had a long-range plan that included goals and objectives for youth services. In this instance also, no updated information has been obtained to determine whether this percentage has changed.

Outcome Measure 3.2.3: Number of Local Education Agencies (LEAs) with a long-range plan for library media center services

In 1998, 30% of LEAs had a long-range plan for library media center services. It is not known whether this percentage has changed. However, it should be noted that considerable assessment and planning occurred for most, if not all, of the 198 school libraries that applied for 2000-2001 LSTA School Library Collection Development Grants (see Objective #3.4). While not long-range planning per se, the outcome of preparing the grant proposal was in many cases at minimum the development of a multi-year collection development plan, usually with school-wide representative involvement via the Media Advisory Committee, as well as other community stakeholders.

Staff observations:

Since no public libraries have yet applied for grant funds specifically to develop community-based youth services plans, the availability of the Planning Grant program may need to be promoted and targeted in a different way.

Objective 3.3: Children and teens are aware of an attracted to library programs and services. (Evaluation Reporter: Timothy Owens)

This objective is in pursuit of the goal of **Libraries as Leaders for Children and Teens** with its Vision for Success that *With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.* For libraries to fulfil their leadership role, a commonly referenced need is marketing and public relations assistance, in order to promote awareness of and support for services.

Activities to support this objective during the evaluation period (1997-2000):

In support of this objective, ***Libraries: The Very Best Place to Start*** marketing and communications campaign was developed. Activities of this effort include:

- Opinion research in 1998-99

- Recruitment of a firm to assist with a public relations and marketing campaign in Spring 1999
- Development of a strategic communications plan, positioning, branding, and graphic identity in Summer 1999
- Communication with the library community about campaign plans in Fall 1999
- 6 regional “Launch Workshops” held across state to introduce local libraries to campaign and prepare for statewide launch event during National Library Week 2000; 500 public library and school library media staff attended.
- 9 intensive “Media Training” workshops were held for public library directors and school media center representatives; 71 library representatives attended.
- Over 1400 public library outlets and school library media centers enrolled in the campaign launch
- Start Me Up! Sweepstakes game launched the campaign, and over 165,000 entries from children were received.
- Starting Point campaign newsletter started in fall 2000 to continue to communicate with school and public libraries about the campaign.
- Public Relations Demonstration Project program developed in fall 2000 to be implemented spring 2001 to support more intensive collaborative communications planning in four communities and to begin the process of creating real change in the way that libraries approach marketing and public relations.

Information on Outcome Measures and Benchmarks:

Outcome Measure 3.3.1: Ranking of marketing as a perceived strength in library services to youth.

Benchmark 3.3.1 reports the number of librarians responding “marketing” when asked “What is North Carolina’s greatest weakness in providing service to youth?” The 5th place ranking reported was from a 1998 survey of librarians. This data has not been collected again.

Staff observations:

The key strategies identified for this objective have been accomplished with planning of the Very Best Place to Start campaign and its phased implementation to date. Support for the Very Best Place to Start continues to grow as now more than 1600 librarians are enrolled in

the campaign. Sharing results of the demonstration projects will be important in reaching the larger library community in the coming program year. A challenge will be to encourage sustainability at the local level. Repeating the opinion research conducted before the campaign might be useful for evaluation after the federally-funded program concludes.

Objective 3.4: Children and teens in schools have access to accurate, current, and attractive resources. (Evaluation Reporter: Penny Hornsby)

This objective is in pursuit of the goal of **Libraries as Leaders for Children and Teens** with its Vision for Success that *With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.* The assumption is that children cannot learn to read or love to learn if the books available to them in their school libraries are not current, accurate, or attractive. Goal 3 and this specific objective were added to North Carolina's LSTA plan as a result of priorities identified in the 1999 strategic plan for youth services in North Carolina, *Powerful Partners* (URL http://statelibrary.dcr.state.nc.us/ld/youth/ysap/strategic_plan.pdf).

Activities to support this objective during the evaluation period (1997-2000):

- LSTA grants were offered to improve book collections in public school libraries. The program focused very deliberately on books. While electronic resources have attracted dollars, spending for books has suffered. The grant program was designed to provide assistance in building strong print collections to assure that North Carolina's children and teens have access to a full range of ideas and information. The grants were to assist eligible public school libraries in developing curriculum-related book collections that are accurate, current, and attractive. Representatives of the Department of Public Instruction (DPI) were involved in the development of the EZ-LSTA School Library Collection Development Grants. DPI staff also assisted with grant review and provided interpretation of information provided by applicants.
- The EZ-LSTA School Library Collection Development (SLCD) Grant program was initiated in 2000 for implementation of projects in 2000-2001.
 - One hundred ninety-eight (198) schools applied from a potential pool of 2000+ public schools. Grants were awarded to 153 school libraries.
 - A total of \$811,171 in LSTA funds was awarded in this first round.
 - Grants were from a minimum of \$500 to a maximum of \$10,000, and required a \$1 for \$1 match.

Information on Outcome Measures and Benchmarks:

Outcome Measure 3.4.1: Number of school library media centers having a median copyright date for their book collections of 1990

For **Benchmark 3.4.1:**

What was measured?

Average copyright date for a subset of school library media book collections

How was it measured?

As a part of the SLCD Grant application process, schools that applied for a 2000-2001 grant were requested to provide the average copyright date of their book collections.

Result as of the end of 2000:

Of the 198 applicants for 2000-2001, 184 provided useable data on average copyright dates of their book collections. Ten of the 184 (5.4%) reported average copyright dates of 1990 or more recent. The median copyright date from these 184 was 1981. At the 1998 Conference on Library Service to Children and Youth, participants cited studies in North Carolina that showed average copyright dates of 1976 in school library media centers. Forty three (23.4%) of the 2000-2001 SLCD applicants reported book collections with average age of 1976 or older.

End-of-project reports from the 2000-2001 funded libraries should show improvements in the average copyright date for the funded school libraries, but this data is not yet available.

Outcome Measure 3.4.2: Annual expenditures per student for library materials

Benchmark 3.4.2:

What was measured?

Three years (1996-97, 1998-99, 1999-2000) of school library expenditure/budget data for library books and for non-book instructional materials, and the current year (1999-2000) school enrollment, were obtained from applicants from school library media centers.

How was it measured?

As a part of the SLCD Grant application process, schools that applied for a 2000-2001 grant were requested to provide the above expenditures/budget and enrollment information. The book expenditure figures and school enrollment figures were entered into a database.

Result as of the end of 2000:

SLCD Grant applicants were required to provide only enrollment numbers for the current year (1999-2000), but not prior years. So while three years of expenditures were provided,

per student expenditures could be calculated for only one year. These calculations were not generated for purposes of grant review; however, the raw figures were instructive to reviewers in seeing the level of effort made by schools to support purchase of library books.

Outcome measure 3.4.2 references expenditures for “library materials.” The data elicited in the grant application process was “book” expenditures and “non-book instructional materials” expenditures. It is not possible to be sure that the combination of those two expenditure categories would be the same as expenditures for “library materials.”

Nevertheless, the following data is informative. For all 198 SLCD 2000-2001 applicants, the average amount reported spent in school year 1999-2000 for library *books* per student was \$9.50 and the median was \$8.54. The range was from \$0 to \$46.79. Disregarding the lowest two and top two schools (\$0, \$0, \$46.36 & \$46.79 respectively), the average amount falls to \$9.21. The top 25% spent \$12.00 or more per student for library books; the lowest 25% spent \$5.12 or less per student.

Though obviously not fully comparable, these SLCD figures for *book* expenditures are analogous to the considerable discrepancy in *library materials* expenditures across LEAs in 1998. For all LEAs, the median amount spent for *library materials* per student per year was \$18.44. The highest 25% spent \$21.93 or more per student for library materials, while the lowest 25% spent \$12.60 or less per student.

Staff observations:

The SLCD Grants are being offered again for 2001-2002, and both average copyright date and library expenditures data will again be requested from applicants. This will provide a growing data source, as will reports from funded school libraries.

Available funds will not solve the problem of inadequate print collections in North Carolina’s school library media centers. The goal of this grant program is to help local school library media specialists highlight this issue in their schools and communities—to serve as a catalyst for change.

Because of the \$1 for \$1 matching requirement, the SLCD grant funding actually supported over \$1.6 million in expenditures for books for school libraries – doubling the impact of the LSTA funds. In addition to expending the grant and matching dollars during the grant year, libraries also had to commit to spend at least the average of the last two years’ book budgets. This ensured that the grant and its match did not supplant regular book spending.

It is apparent from comments of both successful and unsuccessful applicants that the grant program did call attention to weaknesses and needs of school library book collections. Applicants noted that the process of completing the application was very valuable—in addition to providing data on collection size, copyright age, and expenditures, applicants had to assess their collection and if they had one, provide their collection development plan. Media Advisory Committees

assisted in preparing grant applications, and the committee and the librarian reached out to the school and community to find the matching funds. The grant program does seem to have brought to the attention of media coordinators, principals, teachers, parents, and system level administrators the issue of out-of-date and worn library book collections which require more adequate and on-going funding to ensure that book collections can meet the instructional needs of students. Interest in the 2001-2002 grants has been strong.

There were some key strategies under this objective still to be implemented as of December 2000.

Objective 3.5: Children and teens have access to a range of library programs, services, and resources that respond to their needs and interests. (Evaluation Reporter: Ron Jones)

This objective is in pursuit of the goal of **Libraries as Leaders for Children and Teens** with its Vision for Success that *With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.* Overall, the planning process revealed that youth services librarians often develop services and programs without understanding the developmental needs of the age groups they are serving. In addition, data gathered on school and public libraries in North Carolina showed a lack of programs for young adults. Also, very few public libraries had staff designated specifically to work with young adults. There were ample programs being presented to toddler, pre-school and elementary aged children. In order to redress this imbalance in the ability to serve both children and teens, the advisory committee, consultants and State Library staff decided that the first priority in addressing Objective 3.5 should be to focus on improving programs and services to young adults. Skills and abilities in planning and providing programs and services for Young Adults that respond to their needs and interests were seen as necessary to ensure quality library services with statewide consistency.

The Developmental Needs of Young Adults Project provided, in a workshop setting, the opportunity for public and school librarians to gain insight and knowledge about adolescent development and ways to apply that knowledge to the planning and delivery of developmentally appropriate programs and services for young adults by libraries.

Activities to support this objective during the evaluation period (1997-2000):

- October 1999: State Library staff, working with Dr. Brian Sturm, UNC School of Information and Library Science, to develop a workshop for public and school librarians focusing on the interests and behaviors and Developmental Needs of Young Adults

- January 2000: State Library staff, working with Jennifer Sosin, KRC Research, Inc. planned/developed a Teen Focus Group tool to gather information on perception, understanding, likes and dislikes of teens regarding school and public libraries and how and why teens use or don't use libraries
- February 2000: Jennifer Sosin, of KRC Research, Inc conducts two teen focus groups. One group was all male, one all female. There were ten teens in each group, ranging from 15 to 17 years of age. Both two-hour focus groups were video taped and edited to produce a 30-minute video of key segments providing commentary and demonstration of the teen participants perceptions, practices and opinions about school and public libraries, as well as librarians. The video tape was used in developing additional content for the Developmental Needs of Young Adults Workshops.
- April / May 2000 Conducted three Developmental Needs of Young Adults Workshops in: Greensboro, Washington & Lenoir. Over 170 school and public librarians participated in the all day workshop. Workshop participants were provided an "Observation Template" prior to the workshop and were asked to complete and record a total of two hours of observation of teens outside the library setting. This information, along with the Focus Group Video, were used as part of the workshop to begin a discussion and lead up to program/services planning for teens that were developmentally appropriate and responded to the teens' needs and interests.
- While there was not a specific LSTA Young Adult Grant Program offered in 2000 to fund/support Young Adult projects in libraries, the focus and priority was folded into the LSTA Powerful Partners Collaboration Grant Project (Objective 3.1). During the Of the 11 projects funded for 2000-2001, 5 projects specifically targeted library programs and services to young adults.

Information on Outcome Measures and Benchmarks:

Outcome Measure 3.5.1: Median number of teen programs offered in a year by public library outlets in North Carolina

Benchmark 3.5.1: In 1998, 75% of public library outlets offered fewer than 7 programs a year for young adults aged 12 to 18. Half of the public library outlets offered fewer than 1 program a year for young adults.

There has been no additional data provided. However, in planning the 2000 Statewide Summer Reading Program, materials (poster, membership card, door-hanger), as well as reading lists and program ideas in the manual and workshop, were provided to libraries for young adults. Of the 98 counties participating in the summer reading program, 96 requested the Young Adults materials. The Very Best Place to Start Campaign for 1999-2000 included graphic materials focused specifically at young adult library users.

Outcome Measure 3.5.2: Ranking of service to teens as perceived strength in library services to youth

Benchmark 3.5.2: In 1998, in response to “What is North Carolina’s greatest weakness in providing library service to youth?”, lack of service to young adults was the second most frequently cited weakness.

Again, no additional data has been gathered on programs and services to young adults. Data on staffing, use, etc. could be included in a follow-up survey updating the data gathered in the 1998-99 statewide surveys. Among the 170 participants in the Developmental Needs of Young Adults Workshops, all 75 public library systems were represented.

Outcome Measure 3.5.3: Median number of public library programs for school-age children offered in a year by public library outlets.

Benchmark 3.5.3: In 1998 in public library outlets, the overall median number of programs for the general public for elementary-age children was 16 while the median number of programs for preschool children was 66. The number of programs for school-age children in special groups was generally half the number of programs for preschool children.

No additional data has been gathered on programs for school-age children beyond the program statistics in the State Library Statistical Directory, and this data is not broken out by pre-school/elementary/YA. The one area where there would be an increase of programs for “special groups” would be the Powerful Partners projects and the Hispanic Projects with activities involving programs for children. This data could perhaps be extrapolated from the project reports to be completed in 2001.

Outcome Measure 3.5.4: Percentage of each public library system’s outlets that have collaborated with schools, daycare centers, and other community agencies to provide services and programs for children and teens

Benchmark 3.5.4: In 1998, 80% of public library systems’ outlets collaborated with schools, daycare centers, and other community agencies to provide services and programs for children and teens.

Staff observations:

As indicated previously in the report, the decision was made to focus on developing librarians’ skills and abilities in planning and presenting programs for teens by conducting the Developmental Needs of YA’s Workshops in the spring of 2000. Over 170 school and public librarians attended the three workshops held across the state.

No additional grants were offered to support this objective; however, the Powerful Partners and Hispanic services grants funded projects that targeted children and YA's and involved the partnership and collaboration of other community agencies in identifying the needs, as well as providing programs and services to meet those needs.

Objective 3.6: Children and teens have access to library services designed and managed by professionals prepared for the task. (Evaluation Reporter: Timothy Owens)

This objective is in pursuit of the goal of **Libraries as Leaders for Children and Teens** with its Vision for Success that *With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.* This objective was aimed at assuring adequate numbers of professional librarians in youth services. The recruitment and retention of librarians is especially challenging and more important now, as libraries nationwide report difficulties in filling positions.

Activities to support this objective during the evaluation period (1997-2000):

In support of this objective, a subcommittee of the Youth Services Advisory Committee has been formed to examine approaches to increasing the number of youth services librarians. Work has just begun on this objective so there are no results to report. Scholarships, collaborative efforts among the five library schools in the state, and enhancement of distance education opportunities are among the ideas being explored.

Information on Outcome Measures and Benchmarks:

Outcome Measure 3.6.1: Number of LEAs with a library media supervisor with a Master of Library Science (MLS) degree

Benchmark 3.6.1: In 1998, 20% of all LEAs had a Library Media Supervisor with an MLS.

Outcome Measure 3.6.2: Number of public library systems with a youth services coordinator with an MLS

Benchmark 3.6.2: Data on percentage of youth services coordinators with an MLS is not available.

Outcome Measure 3.6.3: Number of total staff in library media centers per 10,000 students

Benchmark 3.6.3: In 1998, for all LEAs, the median number of total staff in library media centers was 3.1 per 1,000 students. Fifty percent of the LEAs have between 2.7 and 3.8 total staff in library media centers per 1,000 students.

Outcome Measure 3.6.4: Number of certified library media specialists per 1,000 students

Benchmark 3.6.4: In 1998, the median number of certified library media specialists for all LEAs was 1.6 per 1,000 students. Only the top 25% had more than 1.9 certified library media specialists per 1,000 students.

Outcome Measure 3.6.5: Median FTE of MLS staff for public services to youth

Benchmark 3.6.5: In 1998, the overall median FTE of MLS staff for public services to youth in public library outlets was 00.00 per 10,000 (e.g., no significant number). The top 25% of libraries had 0.6 MLS staff for public services to youth per 10,000 youth.

Staff observations:

Those benchmark numbers available and reported in the plan are very low. It would be useful to have more information for gauging success and the subcommittee might be approached for input to improve this area for the next evaluation.

Objective 3.7: Children and teens are served by staff with up-to-date knowledge, skills and abilities to deliver library services. (Evaluation Reporter: Timothy Owens)

This objective is in pursuit of the goal of **Libraries as Leaders for Children and Teens** with its Vision for Success that *With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.* Staff with up-to-date knowledge, skills, and abilities are required in order for libraries to be leaders in services for children and teens.

Outcome Measure 3.7.1: Number of youth services staff who participate in 8 hours of continuing education per year related to youth services

Benchmark 3.7.1: There is no current data available concerning annual participation in continuing education related to youth services by youth services staff.

There is still no data available concerning annual participation. Continuing education opportunities are offered annually, but there has been no tracking of individuals across workshops. In 1998-99, 9 sessions of workshops on youth services topics were reported with total attendance of 597. In 1999-2000, 34 sessions of youth services workshops were reported with attendance of 3,680.

Staff observations:

Investigation of potential for offering an in-depth certificate program to train paraprofessional children's staff should still be considered and may best be referred to the subcommittee of the Youth Services Advisory Committee that is beginning to examine ways to encourage development of professional youth services librarians.

**North Carolina LSTA Goal #4:
The State Library as a Leader in Library and Information Services**

Vision for Success: The State Library serves as a model and a leader in the development and delivery of library and information services.

Objective 4.1: The State Library develops and updates plans, standards, and guidelines to support the development and use of information technology in libraries statewide.

(Evaluation Reporter: Robert Burgin)

This objective is in pursuit of the Goal of **The State Library as a Leader in Library and Information Services** with its Vision for Success that *The State Library serves as a model and a leader in the development and delivery of library and information services*. This objective is motivated by the results of the needs assessment process (i.e., the 1995 report of the *Evaluation and Needs Assessment Project*), which indicated that the state's library community expects the State Library to provide leadership in the delivery of library and information services, particularly in the use of information technology.

Activities to support this objective during the evaluation period (1997-2000):

- Development of *Minimum Standards for Library Automation in North Carolina*: These standards were developed in August 1998 and are available on the Web. <<http://statelibrary.dcr.state.nc.us/lsta/minstds810.pdf>> The standards were developed to ensure that grant-funded automated system projects result in adequate and functional integrated library systems to support access to resources for users and effective management of the library and its resources. Specifically, the standards are used in the following ways:
 - Objective 1.3 of the LSTA plan (“Libraries have an automated system that meets minimum standards”) makes reference to the *Minimum Standards* to determine which libraries meet this objective.
 - RFPs developed as the result of LSTA Automation Planning Grants and LSTA Technology Planning Grants are required to meet the *Minimum Standards*.
- Development of a Statewide Leadership Project for 2000-2001, “State Library Technology Plan.” (Because the state's library community represents a major customer group for the State Library and because the State Library has an important role in providing appropriate leadership in information technology to support local library efforts, the development of a statewide technology plan for North Carolina's library community was considered a

prerequisite to the development of an internal technology plan.) This project included the implementation of several key strategies of Objective 4.1:

- Formation of an ad hoc advisory group of North Carolina library representatives with expertise in information technology to assist the State Library staff
- Use of consulting assistance to develop and maintain standards and guidelines
- Development of a single plan that outlines the State Library's information technology strategy for libraries statewide

The Project was approved by the LSTA Advisory Committee but has yet to begin. State Library staff decided to combine that project with a project to assess the technology-related continuing education needs of library staff in North Carolina. The process of combining the two projects into a single project has not yet been completed.

Information on Outcome Measures and Benchmarks:

Outcome Measure 4.1.1: A current statewide technology plan with appropriate standards and guidelines is available to support library efforts statewide.

Benchmark 4.1.1: Project-specific standards and guidelines have been developed; however, there is not a single document that outlines goals, priorities, and other information.

What was measured?

The existence of a single document that outlines goals, priorities, and other information

How was it measured?

Whether such a document has been developed

Result as of the end of 2000:

A statewide technology plan with appropriate standards and guidelines is not yet available. Such a plan would result from the proposed and approved Statewide Leadership Project for 2000-2001, "State Library Technology Plan." One set of appropriate standards is in place, i.e., the *Minimum Standards for Library Automation in North Carolina*, which were developed in August 1998.

Staff observations:

Only one of the key strategies for Objective 4.1 has been implemented, i.e., the maintenance of the *Minimum Standards for Library Automation in North Carolina*, which are used in several LSTA-funded grant programs. A regular process for developing and updating standards

(including the *Minimum Standards for Library Automation in North Carolina*) is likely to be an outcome of the development of a statewide technology plan.

The other key strategies for Objective 4.1 are part of a Statewide Leadership Project for 2000-2001, "State Library Technology Plan." The Project was approved by the LSTA

Advisory Committee but has yet to begin. State Library staff decided to combine that project with a project to assess the technology-related continuing education needs of library staff in North Carolina. The process of combining the two projects into a single project has not yet been completed.

Objective 4.2: On an ongoing basis, the State Library tests and models approaches for integrating technology into library management and services. (Evaluation Reporter: Robert Burgin)

This objective is in pursuit of the Goal of **The State Library as a Leader in Library and Information Services** with its Vision for Success that *The State Library serves as a model and a leader in the development and delivery of library and information services*. This objective is motivated by the results of the needs assessment process (i.e., the 1995 report of the *Evaluation and Needs Assessment Project*), which indicated that the state's library community expects the State Library to provide leadership in the delivery of library and information services, particularly in the use of information technology.

Activities to support this objective during the evaluation period (1997-2000):

- Development of a Statewide Leadership Project for 2000-2001, "State Library Technology Plan": This project included the implementation of several key strategies of Objective 4.2:
 - Development of an internal technology plan for the State Library
 - As part of that plan, development of methods for testing strategies for developing the staff capacity at all levels to manage and use information technology successfully to support the management of the State Library as well as service to library users
 - As part of that plan, development of methods for assuring that staff has appropriate knowledge and skills to support the State Library's leadership role
 - As part of that plan, development of methods for assuring access to appropriate information technologies and telecommunications services to enable the State Library staff to provide leadership

The Project was approved by the LSTA Advisory Committee but has yet to begin. State Library staff decided to combine that project with a project to assess the technology-related continuing education needs of library staff in North Carolina. The process of combining the two projects into a single project has not yet been completed.

- Development of a Statewide Leadership Project for 2000-2001, “MyLibrary@ Project”: This project supports Objective 4.2 by assuring access to appropriate information technologies and telecommunications services to enable the State Library staff to provide leadership. The MyLibrary@ Project seeks to test and model customizable web-based portals as an improved library service delivery method targeted to better meet the needs of individual users. The first year of the project will develop the interface for use with the State Library of North Carolina’s own Web site, and the second year (2001-2002) will include training for both small public and small academic pilot libraries and EZ grants to enable these libraries to purchase the hardware to implement the MyLibrary@ interface.

Information on Outcome Measures and Benchmarks:

Outcome Measure 4.2.1: North Carolina's library community provides customer feedback that indicates that the State Library staff is providing appropriate and needed information and leadership in information technology to support local library efforts.

What was measured?

Feedback from the North Carolina library community has not yet been obtained.

How was it measured?

See above.

Result as of the end of 2000:

See above.

Staff observations:

One of the key strategies for Objective 4.2 has been implemented, i.e., the development of a Statewide Leadership Project for 2000-2001, “MyLibrary@ Project.”

The other key strategies for Objective 4.2 are part of a Statewide Leadership Project for 2000-2001, “State Library Technology Plan.” The project was approved by the LSTA Advisory Committee but has yet to begin. State Library staff decided to combine that project with a project to assess the technology-related continuing education needs of library staff in North Carolina. The process of combining the two projects into a single project has not yet been completed.

Objective 4.3: The State Library provides leadership in evaluation, assessment, and measures of library effectiveness. (Evaluation Reporter: Penny Hornsby)

This objective is in pursuit of the goal of **The State Library as a Leader in Library and Information Services** with its Vision for Success that *The State Library serves as a model and a leader in the development and delivery of library and information services*. If we advocate the value of assessment and evaluation, it is essential that the State Library itself test evaluation and assessment models and then implement the most effective ways to measure the success of LSTA and other programs.

Activities to support this objective during the evaluation period (1997-2000):

- Consultant Frances Mason presented a workshop of two half-days in September 1997 covering evaluation methods and practices. Approximately 20 State Library staff members attended.
- A three-member State Library team participated in an Institute of Museum & Library Services (IMLS) national pilot program of evaluation training using the Outcome-Based Evaluation (OBE) program -- based on a model developed by the national United Way. December 6-7, 1998.
- During December 1998 through spring 1999 the State Library team used the IMLS OBE training to develop, with input from other State Library staff, a logic model for evaluation of the LSTA-funded Master Trainer Program. Some baseline data was also gathered for this project (e.g. interviews with directors of libraries with the first Master Trainers).

Information on Outcome Measures and Benchmarks:

Outcome Measure 4.3.1: Evaluation models are successfully implemented to support the evaluation of LSTA in North Carolina.

Benchmark 4.3.1: Models are still being developed and tested.

Outcome Measure 4.3.2: Overall success of evaluation efforts to meet LSTA requirements.

Benchmark 4.3.2: Initial efforts are just beginning; the State Library is participating in demonstration projects and national planning for evaluation.

There are no “things” to measure under this objective, and as of December 2000 no specific evaluation models had been successfully implemented. However, through involvement in the activities above, the State Library did commit staff time and effort to learning more about evaluation practices and techniques, and to investigating one possible model for evaluation.

Involvement in IMLS' pilot evaluation program did provide some useful information that was used to make some modifications to the Master Trainer Program. However, staff participants found the process complicated and time consuming. A further deterrent to proceeding with this model occurred when a key member of the evaluation team (and the Library Development Section staff member with responsibility for evaluation) became heavily involved in other State Library initiatives and then resigned in spring 2000. IMLS has advised the State Library to learn from the first experience—to try again, but not bite

off so much this time—and to approach the task more simply. This has not yet been attempted.

Staff observations:

The majority of LSTA grant programs offered to North Carolina libraries through December 2000 have been very targeted, and the measures of success formulaic. The next 5-year LSTA Plan may include more grant programs where local libraries will identify the need and must establish their own means of evaluation. Therefore, it is even more important for the State Library to identify viable and practicable methods for evaluation so that North Carolina can clearly show the benefits of LSTA expenditures. The process of completing the evaluation of North Carolina's first 5-year plan may well prove instructive for future efforts.

Objective 4.4: Assure statewide access to state government information in all formats.
(Evaluation Reporter: Duane Bogenschneider)

This objective is in pursuit of the goal of **The State Library as a Leader in Library and Information Services** with its Vision for Success that *The State Library serves as a model and a leader in the development and delivery of library and information services*. The State Library's statutory responsibility for the collection and dissemination of state government publications gives it a unique role in assuring access to state government information. In addition, the Interlibrary Cooperation Plan *Building Communities* identified strengthening Internet access to government information as an important strategic direction.

Outcome 4.4.1: Number of state agencies with World Wide Web resources that have used NC GILS to metatag their web resources

Benchmark 4.4.1: At the end of 1998, two state agencies used NC GILS to tag their web resources.

Result as of the end of 2000:

No additional agencies created metadata for their resources in 1999 and 2000. Due to the low response rate by state agencies, and also to ensure the creation of high quality and consistent metadata that can be accessed through FIND NC, the State Library's electronic gateway to state government information, a strategic shift was made to have the State Library assume the creation of metadata. The State Library designed a metadata database with the assistance of an outside software vendor.

Staff observations:

To fully implement the creation of the metadata database, the State Library will need to commit resources to this project.

Outcome 4.4.2: A strategic plan developed and implemented by the State Library that supports public access statewide to state government information in digital format

Benchmark 4.4.2: The State Library has not developed a strategy at this time.

Result as of the end of 2000:

A strategic plan has not been developed. As preliminary work on the plan, State Library staff developed overviews on government information programs in other states and on identification of key issues involved in providing future access to North Carolina state government information, and compiled information from representatives in state agencies and depository libraries.

Also, extensive developmental work was done on FIND NC, the State Library's central gateway to state government web resources to provide better citizen access to state government information.

- FIND NC was totally redesigned;
- Simple Search of State Government web resources was added;
- Access to NC Local Government web resources was added;
- Access to NC Education web resources was added;
- NC Government Information, describing the organization, mission, and operations of state government agencies was added; and,
- A listing of links to Frequently Requested Information was added.

Staff observations:

To take advantage of the groundwork that has already been laid, it remains important to proceed in developing a plan with input from the various stakeholder communities.

Objective 4.5: On an ongoing basis, State Library supports statewide planning and development activities to assure achievement of the LSTA goals, plans and priorities.

(Evaluation Reporter: Penny Hornsby)

This objective is in pursuit of the goal of **The State Library as a Leader in Library and Information Services** with its Vision of Success that *The State Library serves as a model and a leader in the development and delivery of library and information services.* Objective 4.5 acknowledges that effective statewide planning will foster a sense of collaboration in the library community and help ensure successful achievement of LSTA-funded programs.

Activities to support this objective during the evaluation period (1997-2000):

- During 1998-99 the State Library, the State Library Commission's Youth Services Advisory Committee (YSAC), the North Carolina Library Association and other partners sponsored the Youth Services Assessment & Planning Project (YSAPP). This project resulted in the development of *Powerful Partners: Strategic Plan for Library Services to Youth in North Carolina*, which was adopted by the State Library Commission on June 14, 1999.
- Since adoption of the *Powerful Partners* plan the YSAC has continued to help guide the plan's implementation. Specific objectives of *Powerful Partners* were selected for inclusion in Goal #3 of the LSTA Plan. Through regular meetings during 1999 and 2000 the YSAC and subcommittees have provided advice to the State Library for development of LSTA-funded projects and programs to help achieve these objectives. The projects have included:
 - "Libraries: The Very Best Place to Start" communications and marketing campaign;
 - "Libraries as Leaders and Powerful Partners" collaboration training;
 - Developmental Needs of Young Adults workshops; and
 - School Library Collection Development Grants.
- During 1998-99 the State Library carried out the Interlibrary Cooperation and Planning Project. This project resulted in a strategic plan adopted by the State Library Commission on June 14, 1999: *North Carolina Libraries: Building Communities, A Plan for Cooperation*. The plan's vision is "All of North Carolina's libraries work together to enhance services and access to information so that the people of North Carolina are empowered by knowledge." [See Objective #1.1 for more detail about this project.]

- The Access to Special Collections project was implemented to meet one strategic direction of the *Building Communities* plan. Priorities for action were developed at a statewide leadership conference on access to special collections held in March 2000. The State Library has partnered with key staff of the state Division of Archives and History and Duke University Libraries to spearhead this project. The Access to Special Collections Work Group (ASCWG), which includes representatives of the cultural communities of interest – libraries, archives, museums, and local history collection from across the state, and four subcommittees have guided the Access to Special Collections project. The ASCWG has met regularly since summer of 1999. [See Objective #1.6 for more detail about this project]

Information on Outcome Measures and Benchmarks:

Outcome Measure 4.5.1: The State Library staff works with stakeholders and customers to develop plans and measures of effectiveness.

Benchmark 4.5.1: The State Library is sponsoring two major planning efforts in 1998-99: the Youth Services Assessment & Planning Project (YSAPP) and the Interlibrary Cooperation (ILC) Planning Project.

What was measured?

Instances showing that State Library staff has worked with stakeholders and customers to develop plans and measures of effectiveness

How was it measured?

Review of actual activities that have included stakeholders and customers and that have resulted in plans and measures of effectiveness

Results as of December 2000:

The State Library has evidence of work with broadly representative stakeholder and customer groups for at least three major initiatives as outlined under Activities.

Outcome Measure 4.5.2 State Library customers and stakeholders provide feedback that show that the State Library has been effective in its programs and is providing leadership.

Benchmark 4.5.2: Customer feedback indicates that the activities carried out in the YSAPP and ILC planning projects have been successful from the point of view of customers and stakeholders.

What was measured?

Feedback from State Library customers and stakeholders that provides evidence of effectiveness in its programs and in providing leadership

How was it measured?

Plus/delta activities were carried out at the stakeholder meetings for both the Interlibrary Cooperation and Youth Services planning projects, and those results were used primarily to make adjustments in subsequent meetings. Otherwise, feedback has been informal and anecdotal.

Results as of December 2000:

The State Library can cite informal positive feedback that reflects its effective leadership in planning and developing programs. In addition, feedback can also be implied through the continuing willingness of stakeholders and customers to be involved in ongoing planning through participation in statewide stakeholder conferences and the many meetings of the YSAC and Access to Special Collections project committees and subcommittees.

Staff observations:

The State Library has put considerable staff time and energy into supporting statewide planning and development activities, and has also used consultants to help guide and facilitate these activities. We continue to use the same model, which would indicate that we believe the model has been successful. We can state that we have worked with stakeholders and customers to plan and develop programs.

PART III SUPPORTING MATERIALS

C. Tabulation of Differences LSTA Made for Libraries and for Users (from Regional Meetings)

At the Regional Meetings, participants were asked to relate, for each goal area, the differences the LSTA program made for their libraries and for their users. What follows is a compilation of these differences reported from across eighteen groups at five regional meetings. Differences have been categorized, and the categories are listed in the order of those receiving the most comments.

Slashes (/) represent repeated “differences” that were equivalent.

“Dots” refer to the colored dots that participants were able to place by those items that made the **most difference for users**. They were given five dots to place where they wished; some placed dots by differences for libraries.

GOAL #1: All Libraries as Gateways to Information

Vision for Success: Every library in North Carolina will provide access for its users to the full range of electronic and print resources available in North Carolina and beyond.

Goal 1 has the following elements:

- Statewide network plan
- Physical infrastructure
- Automated systems meet minimum standards
- Library staff have needed knowledge and skills
- Complete bibliographic and holdings information for N.C. libraries
- Plan for making N.C.’s unique resources available
- Effective statewide program of marketing and communications

BENEFITS TO LIBRARIES WERE:

Developing Staff Knowledge & Skills

- * NC LIVE Training - "We've gone to all the training and we've trained the other staff who've in turn trained the patrons." /////////////// (4 dots)
- * Master Trainer /////////////// (2 dots)
- * Technology workshop (6 dots)
- * Library's Master Trainer helped other library staff become comfortable with Internet, and has been designing training modules for the public. ///

- * Quality workshops that are affordable //
- * Support staff attended Internet 101-102. Gave them confidence, gave shared terminology for all levels of staff and with the community. //
- * Encouraged staff to learn more in use of technology and NC LIVE. (1 dot)
- * Master Trainer -- in-house, as-needed staff training (when you develop a new service, you can plan training up front) = a new way of doing business!!
- * Increased interest in staff training (staff enthusiasm)
- * Staff training - more expert - important with high turnover
- * Staff trained to access information
- * Genealogy resources workshop helped staff - made it easier for staff to know what is available.
- * For the Library's Public-Public NC LIVE workshops-Faculty bibliographic instruction workshops

Investments In New Technology

- * More and better computers //////////(2 dots)
- * Automated systems /////
- * First computer experience through LSTA //
- * Library - Community College received BEG; BEG helped library leverage more computers from community colleges.
- * Workstations - Community Colleges - We learned how to take an online exam; also gave us the capability to have classes for training larger groups on internet, NC LIVE, etc.
- * Now have replacement cycle
- * BEG - bibliographic instruction computers/lab
- * Enabled library to put PCs in special service areas (e.g., in Project LIFT -- services for unemployed and underemployed workers -- where LIFT staff could help patrons do job searches online)
- * Electronic Reference Room
- * Set up library network / workstations

Access To More Resources

- * Access to NC LIVE ////
- * Batchloading - ex. of ILL, became integral part of our service; more resource sharing ///
- * Automation grant-knowledge of entire collection at main and branch libraries ///
- * Internet access //
- * Staff access to resources increased.
- * Greater visibility for digitized cultural resources
- * Retrospective conversion improved ILL (better awareness for outside users).
- * Access available when library is not open
- * Automation for integrated catalog of holdings for different libraries and functions; cataloging one input for region; for East Albemarle 4 counties were brought together; for BHM 3 counties of 7 libraries and two book mobiles; also for Neuse Regional; BHM cards & a paper trail for

mailing books back and forth via central library instead of directly; communication and equity for rural areas spread out over large regions; (all said):"could not have done it without these funds"

- * Completed retrospective conversion of circulating collection
- * Loaded holdings into union catalog
- * Union catalog enhancement allowed libraries to better allocate collection development resources.
- * Net access for home schoolers
- * Frame relay technology for Internet use providing continuous access (EARL, BHM); "no possible way we would have got to equity"

Increased Collaboration & Cooperation

- * Best Place "momentary" cooperation with school
- * Good communication between public and school libraries (links on web pages to each other's websites)
- * Were able to forge alliances to strengthen local government

Technology Support

- * Automation planning grant - "Tremendous benefit receiving professional help for RFP, etc. (BHM) ///
- * Able to plan for technology (have no systems person; hired consultant) and help with upgrade to T-1
- * Automation planning - create WAN
- * Planning Grant - broadened library's awareness of technical possibilities (networking) transitional thinking
- * Planned their automated circulation/searching through fully integrated system with remote access; library becomes integral part of local government.

Visibility & Recognition

- * LSTA grants were catalyst for greater recognition of library's IT role on campus -- college placed open lab in library with 40+ computers.
- * Automated system – "project was on budget and on time" - county manager realized scope of project / library got brownie points / respect
- * Change to technology user and leader (transformation from print)
- * Value added (librarians)
- * More and more government departments look to library as model.
- * Enhanced connectivity - "library is seen as being on cutting edge"
- * Master Trainers and NC LIVE Training - staff can help users make best use of increased access; libraries as community educators; providing leadership

Suggested Improvements

- * Frustration because no index for NC LIVE
- * Timing for schools off; difficult for schools and public libraries to cooperate because of timing

Miscellaneous

- * Retrospective conversion //
- * Net Library (1 dot)
- * Interested in e-books (1 dot)
- * Catch up for smaller, underfunded
- * Enhanced connectivity
- * Library has some expertise in digitization.
- * Install LANS in 3 counties WAN in Regions
- * Batchloading-LSTA paid for first year only
- * Better understanding of over-all LSTA Plan
- * Change in types of users: used to be children and young adults; now it's more adults.
- * Very Best Place to Start - really great focus to draw kids into the library
- * Focus on contest to show kids Internet resources
- * Library not connected to real world before LSTA grants

BENEFITS TO USERS WERE:

Knowledgeable Staff

- * Better service from more knowledgeable staff because it's now easier for them to search Internet and use electronic resources // (37 dots)
- * Students spend less time on research because staff guide them better. (2 dots)
- * Staff can assist users with NC LIVE. // (1 dot)
- * Staff better able to assist the public //
- * Increased knowledge of business and medical resources
- * Staff now offer E-reference, Readers Advisory service to patrons.

Access To A Deeper/Broader Pool Of Resources

- * Enhanced access to electronic resources such as NC LIVE, online catalog, Internet /// (12 dots)
- * Access to new resources (including 24 x 7) (8 dots) //
- * Enabled all of users to get same information at any branch /// (5 dots)
- * Able to borrow more easily from whole system (placing reserve / hold) shortening the time it takes to receive materials since they bypass a central point & go directly from one to the other // (5 dots)

- * Place holds over 4 counties; greater access to resources; courier transfer of materials including reference; direct from any library in county; "seamless access" in 3 days (vs. 2-3 weeks before) (5 dots)
- * OCLC; Worldcat (3 dots)//
- * Students are using more high-quality resources. (3 dots) //
- * First time opportunity to see all materials in system from anywhere and anytime (3 dots)
- * Have access to other libraries' collections because of batchloading (3 dots)
- * Automated system - subscribe to several online databases, e.g. Lit Resource Center, Bio Resource Center (Through Gale) (3 dots)
- * Union catalog enhancement helped meet needs of diverse populations. (2 dots)
- * Helped older adults with prescription drug information; saved money on drugs etc. (2 dots)
- * Adults are looking for jobs, employment information, car information (2 dots)
- * Access to more resources (ILL) //
- * Images from special photo collections will be available via the Internet.
- * Greater variety of materials available now (NC ECHO)/Special collections not previously available

Convenient, Affordable & Easy Access

- * Better service/access (speed of response) /// (10 dots)
- * Florida and other borrowers are thrilled!! Happy campers !!! AMY's new automated circ system and the Internet access computers have made patrons very proud of their library and of their community for the successful completion of this important link to the greater world. Patrons are getting the information and help they need in the same speedy/efficient way that folks elsewhere have been doing for some time. So patrons are happy to get what they want and are happy/proud of their library for providing it. Everyone at the table chimed in that having happy patrons was important to them and of course to the patrons too! (10 dots)
- * Continuous access to Internet by patrons themselves; self service versus old way where librarian dialed up and handled patron's query /// (7 dots)
- * These computers can be used by kids without permission to access the Internet. (7 dots)
- * Equal access to information/materials (6 dots)
- * Patrons don't have to wait for ferries. (transportation means, ferry) /// (4 dots)
- * Transparent integrated experience; all resources available at all workstations /// (3 dots)
- * Email // (3 dots)
- * More and more different people using NC LIVE in library (3 dots)
- * Public access terminals (3 dots)
- * Students are more attentive and involved because they have enough PCs. (3 dots)
- * Helping libraries meet minimum standard for number of workstations appropriate for number in community (2 dots)
- * Public can access specialized info services. (1 dot)
- * NC LIVE access at home (1 dot)

- * NC LIVE in library (1 dot)
- * Removed economic barriers to accessing information //
- * Internet access to all community members (only source)
- * Access to information for home schoolers
- * Can download e-book to personal computer at home; users can find things library doesn't own. Often used as a last resort
- * Users no longer have to go to card catalog and online catalog; now access entire circulating collection directly and also via remote access
- * Students came from automated high school libraries (met student expectations).
- * One patron saved money trading stock using the community college library's PCs.

Opportunities To Learn

- * Trained the patrons (NC LIVE) (5 dots)
- * Users practice what they learn in bibliographic instruction classes immediately. (3 dots)
- * Offering classes to public for how best to use increased resources /// (1 dot)
- * Help distance learning students take classes and exams with our tutoring if they don't have computers at home (1 dot)
- * Faculty request more bibliographic instruction for students. (1 dot)
- * Students more sophisticated at school due to using computers at public libraries (1 dot)
- * Master trainer trains library users too. //
- * Users more independent
- * Classes in library can be hands-on instead of simply demos.
- * Library's PCs have been some patrons' first introduction to computers - Wow!! You can teach me to use a computer! Send email to grandchildren
- * Training ESL students
- * Encouraged reluctant users of computers
- * Larger numbers can learn at the same time in computer classroom; better use of staff training time
- * Support for students for classes offered by universities at community college
- * Improved computer skills of users

Increased Awareness & Utilization

- * Local officials turning to library for their information needs (1 dot)
- * Usage up
- * More users!! (went from 20 to 200 users) And more users means that more people are getting better access.
- * Attitudinal impact on kids; slogan has helped kids know this is a place to start.
- * Motivated kids to use computers for personal interest rather than school work; gave librarian an article for newspaper

Suggested Improvements

- * Core collection retrospective conversion is good, BUT the unique items may be more beneficial statewide. Local workbooks, etc.

Miscellaneous

- * Users in schools & community colleges received benefit - had access (3 dots)
- * Better decisions, better use of tax money, expert help allowed for more product in the end with less waste; didn't waste money. (3 dots)
- * Quality System was planned - resulting in better service to users (2 dots)
- * Better / improved service to users //
- * Better understanding of over-all LSTA Plan

GOAL #2: Achieving Equity in Public Library Service

Vision for Success: Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide.

Goal 2 has the following elements:

- Automated systems
- Public access to the Internet
- Services to Hispanics
- Planning & evaluation resources & support

BENEFITS TO LIBRARIES WERE:

Investments In New Technology

- * Computer purchases //////////// (6 dots) (CS: In some cases significant increases. Provided the first computers/Internet access for a community or increased dramatically the number of computers available to the public. Allowed libraries to approach or reach state guidelines for computers for population)
- * New workstations- Assistive technology workstations hardware and software
- * Public library has Internet access and automated systems (2 dots)
- * Large rural regions benefited from Integrated Library Automation. (EARL, BHM) "Equity Delight" (1 dot)
- * BEG/ECG - purchase more equipment, work stations, wiring for T1, (and adding Gates at the same time) worked well together with infrastructure in place for Gates
- * Helped leverage regular funding for equipment (HRP)
- * BEG - put PCs in specialized areas
- * Now have computers in small branches that had none before.

Planning Assistance

- * Hispanic Needs Survey informed collection development and services, raised staff awareness, learned where Hispanics live ///
- * Long Range Planning a good plan with input from the public ///

Developing Staff Knowledge and Skills

- * Staff feeling some pressure to "catch up" -- need to know how to use all this new technology to serve patrons (5 dots)
- * Hispanic services workshop increased staff awareness of Hispanic community and cultural differences to bridge for planning. ////(1 dot)
- * Staff learned appropriate outreach.
- * Without Master Trainer or technical workshops, NC LIVE would not be used as effectively.
- * Empowers staff

Access To More Resources

- * NC LIVE - "leveled the playing field" "raised self-esteem of community" ///
- * Other resources utilized
- * Getting resources from other branches as well as traditional ILL. Difference in collection development; better decisions about purchasing
- * Retrospective conversion grant helped identify what was in the collection. First time for inventory since 1970
- * Grant of collection purchase of science materials
- * Catalog on Internet web link (LSTA purchased OPAC)
- * Hispanic workshops led to purchasing more Spanish materials.

Increased Collaboration & Cooperation

- * Achieved a "we are all in this together" consciousness among different types of libraries - awareness of overlap in users - fewer differences in what libraries do (are?)

More Users

- * Circulation increased (maybe new users in for computers) ///
- * More registrations //

Technology Support

- * Has Technology Plan in place
- * Automation Planning - "what we don't want to do" -- beneficial to get new, not upgrade, workstations with printers

- * Retrospective/automation planning grants saved librarian in identifying what companies were actually saying in contract and evaluate RFP.
- * Have used standards to plan budgets, replacement policies

Visibility & Recognition

- * Library took on leadership role for larger institution - Required larger institution to go beyond existing technology (e.g. Security, web pages, printing, authentication). (1 dot)
- * Changed perception of library, now seen as "information age" place, improved image. //
- * Library has gained visibility in Hispanic Community (only outreach project ever seen to work this successfully).
- * Patrons tell others. Word of mouth PR

Miscellaneous

- * Equalized service among all county branches (2 dots)
- *Elementary School - signage in Spanish every where (1 dot)
- * Decrease in ILL
- * Improved distance learning classes (community college and other all over US)
- * Hickens & Camper - checking e-mail
- * No place to park
- * Allowed library to house more information (space issue)
- * Hispanic Grants will help libraries with this clientele.
- * Hispanic services grant (4-county grant)
- * Try to translate what we do into Spanish inspired by book purchase of Spanish books- Book grant - purchased 100's of children's books in Spanish
- * Retrospective conversion
- * More aware of computer access available elsewhere in community

BENEFITS FOR USERS WERE:

Convenient, Affordable & Easy Access To Technology

- * Accommodate more users - ease of access/more time available/more access points // (23 dots)
- * Access for economically disadvantaged students (7 dots)
- * Patrons search from home. // (4 dots)
- * Can walk into any library and stay in touch with their family, their culture, their roots/heritage. // (3 dots)
- * NC LIVE now means have ability to use all types of resources all in one place (2 dots)
- * Computers available to community at large (1 dot)
- * Access for those with no access elsewhere (1 dot)

- * Went from 3 to now 30 computers available and more computers available mean more users have access more often (An astounding increase in number of users because there are more computers available)
- * Improved access for off-site students for courses in and out of North Carolina
- * High school students can do homework assignments on the public library's computers.
- * Only point of free access to Internet in community
- * Access to e-mail

Access To A Deeper/Broader Pool Of Resources

- * Everyone has access to more material. ///// (11 dots)
- * Hispanic community now has a community resource for them both as a place and materials in their language. (10 dots) ///
- * Empowers users - can do research on their own (1 dot)
- * Lots of software available (from Gates but via infrastructure in place) (1 dot)
- * Know needs! And can better plan services (can provide information materials in Spanish)
- * Increased patron access to NC LIVE and the Internet and e-mail
- * Library can respond to 99% of requests.
- * "ESL Center" - for ESL students in 6-7 languages from public school collection grant; also check out materials to the parents
- * Helped users know what collection contained
- * Also grant purchase - Updated science collection. Teachers are now coming to use the library materials and the students are writing reports with current information.

Increased Awareness & Utilization

- * Increased awareness of library and services among Hispanic community // (4 dots)
- * More kids using reference collection - saw it as fun as a result of start me up sweepstakes - changed image of using the library (4 dots)
- * Users more aware of /use other resources in library // (1 dot)
- * More patron users ///
- * Improved communications with larger institution; expanded their view
- * Focused - Users will see a concerted effort and focus of library.

Knowledgeable Staff

- * Patrons have access to many more resources and staff capable of assisting them. // (3 dots)

Opportunities To Learn

- * Introduced patrons to access to NC LIVE and the Internet
- * Helped older population to be more comfortable with technology
- * PCs in locations where expert help is available for that service

- * Increase in Spanish speaking elementary school students ages 5 - 11 from #20 to #85 Early readers in Spanish got the students reading and that made it easier for them to move to reading English; teachers saw benefit of books from library to encourage reading & now want more levels available. Students were very excited to see the "Libros en Espanol" section signs.

Miscellaneous

- * "Electronic Bridges Over Water" - Internet and integrated systems (7 dots)
- * Equal access to materials (5 dots)
- * Locate potential users (3 dots)
- * Computer (3 dots)
- * Building community as all become aware of diversity - "bridging the gap" (2 dots)
- * Served / underserved (2 dots)
- * Positive activities for youth (2 dots)
- * Community no longer thinks of itself as small. (2 dots)
- * Involved more of community (2 dots)
- * Planning grant - trying to be responsive to user interests and needs (2 dots)
- * More programming for Hispanic community
- * Served / underserved (hearing impaired)
- * More services
- * A good plan for the library and the community because of help with the long range planning process
- * Spanish - language computers (Gates grant)
- * Helped get automation system
- * User went to a county that has many LSTA funded libraries

GOAL #3: Libraries as Leaders for Children and Teens

Vision for Success: With leadership from libraries and librarians in every North Carolina community, children and teens learn to read, love to learn, and have access to the world.

Goal 3 has the following elements:

- Community collaboration
- Long range community based plans
- Youth are attracted to library programs and services.
- Access to accurate, current and attractive resources
- Access to a range of library programs, services, and resources
- Services managed by professionals and served by a knowledgeable staff

BENEFITS FOR LIBRARIES WERE:

Increased Collaboration & Cooperation

- * Powerful Partners grant proposal development built partnerships: // //(3 dots)
 - between library and community
 - between libraries
 - Durham schools and NC Museum of Life & Science
- * VBPTS brought schools and public libraries together // (4 dots)
- * School and public libraries participating together in Powerful Partners brought more often and visibly together. Bringing the group together had many follow-up gatherings such as a bunch sponsored by one and more subsequent talking together for "real reasons". No longer just common vocabulary and different language, now more common language and different vocabulary - resulting in exploring issues which had been previously avoided (3 dots)
- * Powerful Partners workshops fostered relationship between public/schools librarians, lessons learned about collaboration. //
- * Better understanding of each other //
- * Powerful Partners grant - improved collaboration with museum, training on teams, increased collaboration with schools, leveraged local funds to match; this project led to the partners' receiving an IMLS national grant.
- * Powerful Partners - Schools, public, Episcopal Book Store brought, authors, illustrators to each school. Public Library hosted a program. Good for home schoolers. Evaluated collaborative Partners and authors.
- * Powerful Partners. Library did workshop on Internet access. Was first project of this type for new youth services librarian. Brings different types of libraries together. Users have more options to obtain resources. Full enrollment at all 3 sessions
- * Barriers dropped tremendously to communications -- Ex., school people sharing curriculum changes with public library
- * Waiting room (giveaway to kids) - health dept.
- * Collaboration with elementary school to get library card for all 1st graders (FOL volunteers did the sign-up) and won a VBPTS brand champ digital camera
- * Unified message (collaboration)
- * Author visits (?LSTA?) mini-grant collaboration with school
- * Collaborative collection development - public library and K-2 school

Collection Development

- * Leveraged more funds for library // (4 dots)
- * Removed books with old information // (1 dot)
- * Analyzed the entire collection; saw the weakest areas // (1 dot)
- * Big impact on school library collections:
 - more easy readers (2 dots)
 - received grant // (1 dot)

- more science books //
- 1400 new books (represent 25% of collection) = 4 years budget
- non-fiction and reference books for middle school and Accelerated Reading books too
- totally replaced science collection
- more history books
- geography books
- * Highlighted age of resources in libraries //
- * Hispanic outreach collaborative + collaboration (\$18,000 in Spanish language books for kids so they can learn about their Hispanic heritage)
- * EZ LSTA Collection Development Grant -Partnership with local governmental agency and multiple collaborations. "We would never have gotten it; we had asked year after year." Provided "seed money" - " you have to have a carrot to dangle"; "they'll gladly match \$ for \$ or suggest match for schools from civic organizations"; "wonderful networking and widespread community support" was result. Every year something would get "top priority over print materials"; we received \$250,000 over our regular budget.
- * Grant allowed call for collection assessment, justified the activity (rather than just help us); provided impetus - "we have to have this year, even though we're all really busy." Received "suddenly some recognition of pay off between paper work and plan"
- * Helped administrators of school understand the importance of the library to the school: how much books cost; how hard it is to target certain sections of the collection because of cost (e.g. science).

Developing Staff Knowledge & Skills

- * VBPTS - lessons about PR ///
- * NC LIVE training for staff
- * Improved staff understanding about cultural differences
- * Focus group video - helped staff learn more about population
- * Campaign helped staff realize how important they are in helping kids in libraries.
- * Made staff more tolerant of teens
- * Powerful Partners Workshops gave us some good programming ideas - stimulating and thought provoking
- * Kept library staff very busy sharpening reference skills and learning more about their own collections

More Users

- * VBPTS brought kids to the library and they thought it was fun. ///

Visibility & Recognition

- * Start-me-up game worked with public library (library got some ideas for contests to bring kids in).

- * School and public library cooperation increased awareness of the importance of marketing and raised community awareness of library's importance.
- * VBPTS Kick-off and game - lots of kids came in library, met staff, played the game. Great publicity (ABC TV interview) for library (Big Book)
- * Allowed writing other grants - for project tomorrow and ecology (procedure/support)
- * Public Relations Demonstration Project - Library is communicating with public, including schools, to better services, improve communication with government officials, county commissioners, school administration. Learning PR skills (staff), media training (1 day), made it easier for the library to send a clear message.
- * Start Me Up served as a focus: publicity, templates, statewide focus on developmental needs of youth.

Miscellaneous

- * Net access for home schoolers
- * Library is "the place to go to be greeted in a friendly manner."
- * Powerful Partners: Battle of Books discussion at library
- * Very Best Place To Start game got students and parents involved in reading.
- * Graphics were very good.
- * Powerful Partners workshop led to "lunch in the library" (high school).

Suggested Improvements

- * Training was mostly geared to libraries in the larger (TV) markets. (State Library should use Win White, NC Newspapers Assn. as future consultant/ instructor.)
- * Tight timetable on kick off was very discouraging - wasn't enough time to build cooperation / involvement with local schools.
- * Info did not get to all school libraries – re: collection development grant.
- * Statewide campaign for PR. Way too much money spent on implementation. Too many materials printed. Individual schools did not seem to participate in many cases. Good to have statewide focus.

BENEFITS TO USERS WERE:

Access To A Deeper/Broader Pool Of Resources

- * School kids/teachers have better collection. /////////////// (36 dots)
 - attractive
 - up-to-date
 - accurate
 - more

better aligned to curriculum

- * Teachers with non-geography expertise checked out books for students use. Designing a travel brochure, posters, tourist marketing (6 dots)
- * Improved science collection - lots of use // (5 dots)
- * Meet needs of 1st grade readers moving from primers (4 dots)
- * New community resource for Hispanic community (1 dot)
- * Better referral to libraries and other agencies in community (1 dot)
- * For students at school, completely new service of Hispanic collections for elementary schools
- * Previously underserved population accessed needed materials
- * School found business partners to fund homework reference (from Powerful Partners).
- * Students notice and use new resources.
- * Students in high school taking college classes have better access to full resources.
- * Home schoolers (curriculum, resources, etc.)
- * Updated image of family / diversity in collection

Increased Awareness & Utilization

- * VBPTS/SMU-Raised awareness among children and adults of library services // (10 dots)
 - Students
 - Children with parents
 - Non-library users
 - Families
 - Teachers
- * More kids using reference collection - saw it as fun as a result of Start Me Up sweepstakes - changed image of using the library (4 dots)
- * Multiple collaborations - local business sponsorship (Weyerhaeuser, Sprint), private trust funds (Wells, West, Perkins), foundations; school board added \$100,000; different businesses sponsored 31 different schools (3 dots)
- * Parents got more involved, got library cards, changed attitude toward library. (2 dots)
- * Powerful Partners help reach kids through partnerships. (2 dots)
- * Kids now have library cards and aware that librarians are there to help them. (2 dots)
- * Excitement in community about coming to library
- * Overwhelmingly positive response from the Latino community who took advantage of this service !! (2 dots)
- * Everybody wins because as users become more familiar with the library they become better informed and better able to use the library's resources.
- * All first graders have a library card!
- * Principal saw fit between material and grade level: "This is the grant." Good public relations, opens dialog, enforces accountability on the principals too
- * Summer Reading Program participation increased as a result of Start Me Up.
- * Exposed students to cultural/political discussions; changes users' perception of library as commons area

Knowledgeable Staff

- * Improved use by students because staff better able to help them
- * Better understood, better served
- * Better trained librarian
- * Staff person better able to present program both to users and to media
- * We will use some of the inspiring ideas.

Opportunities To Learn

- * Before grant, library worked in isolation. Students in inner city high school have had extensive training in using library resources, storytimes. Students have taken their learning to younger students in earlier grades. (6 dots)
- * 35-40 (food helped bring them in!) kids reading and talking about books //(4 dots)
- * Anglo awareness of Hispanics improved (2 dots)
- * 10th graders are excited about the Powerful Partners project and about reading; they have developed a website; and they're teaching and sharing their excitement with younger kids. (2 dots)
- * Students reading scores have increased!! (1 dot)
- * Kids have books at home--have a home library.
- * When child sees parent reading, encourages child to read.
- * Full enrollment at all 3 sessions; training on use of Internet
- * Widened horizons - Students saw a real life author and illustrator for the first time.

Miscellaneous

- * A shared goal – “the man in the balcony” with teachers and media coordinators (3 dots)
- * School children were able to participate. (2 dots)
- * People could see correlation between test score areas and print materials needed. (1 dot)
- * Additional grants for materials via Project Tomorrow, ecology and ESL, and Character Education (1 dot)
- * Better access to community resources (public relations demonstration project) (1 dot)
- * Improved community relations (Anglos and Hispanics)
- * Communication with school libraries
- * Users obtained a library card.
- * Public Library staff at school more for family night, etc.
- * More coordination of efforts of services to be provided and facilities used
- * 1 shared facility already, a 2nd one on the drawing board, and looking at more of those with a greater openness and sense of shared goals from groups previously separate
- * Students in alternative schools/alternative setting - (can't be on campus - role for public libraries)
- * Our library received a digital camera.

GOAL #4: State Library as Leader in Library and Information Services

Vision for Success: The State Library serves as a model and a leader in the development and delivery of library and information services.

Goal 4 has the following elements:

- Plans, standards and guidelines
- Models approaches for integrating technology into library management. (My Library @)
- Leadership in evaluation and assessment
- Access to state government information (FIND NC)
- LSTA planning and development (NC ECHO)

BENEFITS FOR LIBRARIES WERE:

Access To More Resources

- * FIND NC an excellent source of information //// (4 dots)
- * Looking forward to "MyLibrary@" and kids portal (1 dot)
- * Links to additional web resources
- * NC ECHO - facilitates access to information from special collections
- * FIND NC added as link on webpage
- * NC ECHO added as link on webpage and lead article in FOL newsletter!
- * Electronic info. is more up-to-date.
- * Interlibrary Cooperation Committee
- * Interlibrary cooperation efforts - batchloading, , NC ECHO, records loaded, library is now a net lender library; loaned an item to Oxford University.
- * Use of FIND NC enormous range of agencies and divisions covered, yet still requires some strategy to use

Technology Support

- * Minimum standards helped justify purchase of new computers. //// (1 dot)
- * Minimum standards for automation - quality, not just cheap (3 dots)
- * My Library @ will be useful tool.
- * Leadership - advocating automation and Net access
- * Minimum standards helped college/public library raise college and county funders' awareness of local needs
- * Minimum standards for auto were helpful - requirement to have an Equipment Replacement Policy spurred discussion about this on campus.
- * Development of minimum standards for library automation in North Carolina - allowed us to be able to teach a whole class of students.

- * Automation standards gave a good place to start.
- * E-rate - "Grant Pair a gem, helpful, also Dr. Burgin," "helpful for those of us born in the wrong century," good liaison for grants
- * Fostered partnerships with IT departments

Developing Staff Knowledge & Skills

- * NC LIVE - Training (Some feel needed resources taken from this for other programs.) ///
- * CE and training (e.g. Business Resources, Internet 101, ILL)
- * Continuing Education - !!Master Training!!, NC LIVE, etc.
- * Listserv (Powerful Partners/Start Me Up) awareness of new ways of doing things/ thinking about change focused on NC
- * Master Trainer
- * Better trained staff
- * Revised orientation

Visibility & Recognition

- * Promotion of NC LIVE (password access)
- * VBPTS - initiated, got media attention, more users / a user won a CD player.
- * VBPTS - contest to draw students into the library; questions used to motivate them
- * VBPTS - County librarians and schools collaborated for the first time.

Miscellaneous

- * Communications from Ron Jones (1 dot)
- * Collection Development Grants (response to school library community)
- * Batchloading
- * Resource to librarians in the field - place to call
- * Looking at constituencies instead of institutions
- * Increase in collaboration and communication (being included)
- * Means of evaluating quality
- * Keeps information access a public thing, not usurped by business
- * Allowed libraries to better reach out to wider geographic area

Suggested Improvements

- * Minimum standards were too low for some libraries.
- * Per capita number of computers is way too low.

BENEFITS TO USERS WERE:

Access To Deeper/Broader Pool Of Resources

- * Users can FIND government info & obtain it faster. ////////// (10 dots)
- * Access to resources for users ///
- * FIND NC gives users an idea of how tax dollars are spent. (1 dot)
- * My Library @ will be useful tool.
- * Interaction among types of libraries; NC-ECHO up in less than 1 year!! Already useful to high school and academic students

Convenient, Affordable & Easy Access

- * Remote access to NC LIVE - support services (5 dots)
- * Ease of access to electronic services (more, better = faster, more complete service) //// (2 dots)
- * Emphasizes access for all, not just those with money (3 dots)
- * Benefited from better / longer-lasting equipment than library might otherwise have gotten (2 dots)
- * Automation standards helped assure better quality service. // (1 dot)

Knowledgeable Staff

- * Staff more able to help; better customer service //// (4 dots)
- * Quality of library instruction improved. (2 dots)
- * Improved services as result of CE

Increased Awareness & Utilization

- * Students were made aware that there was a public library. (2 dots)
- * Motivated reluctant students to use the library

Miscellaneous

- * "e-rate" (5 dots)
- * May shake loose money to keep automation moving (3 dots)
- * Expanded definition of library user (1dot)
- * Orienting and teaching Community College classes directly via groups rather than individuals for instructing and training on use of OPACs and internet, etc. (1 dot)
- * Users - regardless of where information is located (1 dot)

PART III SUPPORTING MATERIALS

D. Plus/Delta Comments Made at Regional Meetings on Internet Access for the Public in Public and Academic Libraries

NOTE: Slashes (/) represent repeated “differences” that were equivalent.

North Carolina LSTA Programs Included

Basic Equipment Grants
Enhanced Connectivity Grants
Technology related workshops for staff
NC LIVE Training
Master Trainer Program

What Worked Well

MAKING (MORE) TECHNOLOGY AVAILABLE

Equalized access to Internet for those isolated by dollars/geography /////

More computers ///

No way we could have done it //

Better computers

LCD projects and laptops

Public more technologically available

Allowed first computers and Internet access

Rural equity

Equity for colleges

Reducing the gap between haves and have-nots

In SW mountains college has some of few Internet computers in region/many tourists using

Extra work stations allowed more training and provided ability to train whole classes and use for distance education.

Internet PC's for patron access at all branches

133% increase in number of public access PC's

45% increase in users of public PC's

Spanish-language PC's provided by Gates

Use PC's to create resumes, do job search on the Internet; students use PCs to write papers for school assignments.

Many Red Cross volunteers from around the US used library PC's to keep in touch with family while they were working in NC after Hurricane Floyd.

ACCESS TO RESOURCES

Greater access to more information & resources, particularly NC LIVE //
Customer gets information faster //
Specialized resources more accessible
Explosion of resource sharing activity
NC LIVE useful for senior projects
Patrons have access to up-to-date info
Retrospective conversion requirement to lend on ILL helps justify to institution both giving and receiving material in resource sharing
Quality resources
NC ECHO and FIND NC are good.
Enhanced connectivity/faster access
ECHO provides "one-site" access to the state's cultural and historical resources.

TRAINING

High-quality staff training: NC LIVE, Internet 101, Master Trainer, etc. //
Classes for the public //
Staff training
Training allowed staff background to modify training for less experience staff.
When participants were turned loose in computer labs to practice using NC LIVE it was beneficial even if they have trouble understanding technical aspects from earlier instruction.
Great
Staff training in NC LIVE, genealogy
NC LIVE briefing session on customization-library got lots of ideas on how to restructure web pages for better access for patrons.
NC LIVE Business Workshop-timing was perfect, right before academic library staff faced an influx of business students who needed assistance.
Statewide training insures consistent, high-quality training for staff regardless of library size or location.
Library reused training materials/tailored handouts from NC LIVE health resources workshop to offer training to new Physicians Associate students.
Staff came back from NC LIVE training enthusiastic about helping patrons use it-result is that many more patrons are using NC LIVE.

GRANT REQUIREMENTS

Grants didn't require matching.
LSTA more accessible than HEA
EZs were terrific/application was simpler.

STANDARDS

Defined standards
LSTA has made it possible to meet/approach state guidelines for computers per user.

Most libraries are up to standards.

PUBLIC RELATIONS

Good PR for libraries

Changed the image of the library as a more technologically cutting edge organization

Meeting user expectations

Library will put library card application and brochures in Spanish on Internet.

MISCELLANEOUS

Increased library usage //

Encourages students to think on a higher level

How good and what was needed

Brought in wider range of patrons

Expanded librarians view of what is information

Older patrons come with grandchildren to use e-mail.

Users gaining computer skills that enhance employability.

What Could Be Improved

TRAINING

More training for users ///

More needed

More computer skills classes e.g. routine maintenance, updating, Gates software

Workshops closer to home

More workshops

Lack of training on NC LIVE for support staff; level of training requires more background.

For remote areas users received training in basic computer literacy.

Trouble understanding some of the technical aspects of NC LIVE that wasn't clear in training

Master Trainer lack of follow-through

Need more workshops on how to search and specific types of resources

Resources to support changing role of library staff as information managers

Need to focus on overcoming information overload

Change focus on management of workstations and services.

Focus on impact of participation in CE: get information from participants, share with directors.

EQUIPMENT NEEDS

Replace/upgrade Gates and other computers. //

User demand will increase/support additional peripherals. //

Faster, more capacity, graphical interface needed.

More speed
Faster, better, more reliable, more affordable access
Replacement computers
Technical support, help in maintaining PC's
Regional technical support/Help Desk at state library/grants to hire tech support
Increased bandwidth
Academics didn't get Gates grants; still need more PC's
Circuit riding webmaster

GRANT GUIDELINES

Money only available to poorer libraries
Money not available for more advanced counties
School libraries not included in hardware grants

STANDARDS

Standards/workstations per capita were too low. Public expectations increasing //
Consider raising standards on number of workstations.
Reconsider minimum standards/needs vary across state, adjust for home computers levels, rural vs. urban.

INTELLECTUAL FREEDOM

Pornography, nobody knew how to handle
If filtering required by LSTA then LSTA should pay.

ACCESS TO RESOURCES

Patrons from other regions have access to collections outside their immediate area.
Too much cost for increased resource sharing
Patrons expect that everything will be on the Internet.
Some patrons do not know how to evaluate the web pages.
Publicize NC ECHO and FIND NC more.
Add more resources for NC LIVE.
Need survey tool to determine what resources are using/want to use
Quality control (evaluation, professional selected resources)
Kiosk/remote access w/o library requirement
Campuses
Day care/community centers
Make community information/local resources web accessible.
Increase access to electronic resources, expand NC LIVE.
Need web access to union catalogs (AHEC and others); create regional union catalogs.
Regional union list of serials
Resources to take the lead in local information access/web development/technology

Support for promoting content (NC LIVE) available via Internet/adding focus in curriculum, collaboration with faculty/stakeholders

MISCELLANEOUS

Lots of complaints about restriction to use # of computers
Overwhelmed with tourists getting their e-mail while away from home
No local benefit
Expand Hispanic access to technology

Participants showed recognition of and appreciation for the various components of this program emphasis: technological infrastructure, electronic resources, and staff training. Comments of what could be improved call for more of the same: more training, improved equipment, more resources. Some comments related to grant guidelines needing revision, a need to raise the level of standards, and concerns with content on the Internet.

The Needs and Priorities that relate to this emphasis also call for more of the same:

- a great number of requests for training—largely on technology and electronic resources,
- needs for technology support in the form of consultants and support staff,
- enhanced electronic access to collections, and
- increasing bandwidth.

There is a clear picture of a program that has addressed an important need for North Carolina libraries, that has had remarkable success, and that has stimulated an interest in continued or increased State Library programs.

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**PART III
SUPPORTING MATERIALS**

***E. Plus/Delta Comments Made at Regional Meetings on
Services for Youth in Public and School Libraries***

NOTE: Slashes (/) represent repeated “differences” that were equivalent.

North Carolina LSTA Programs Included

Powerful Partners Project (workshops and mini-grants)
The Very Best Place to Start (opinion research, marketing & communications
plan, campaign, media workshops, Start Me Up Sweepstakes game)
School Library Collection Development Grants
YA focus groups and workshops

What Worked Well

COLLECTION DEVELOPMENT GRANTS

Very helpful & needed; improved collections ///////////////
Local match //
Encouraged community linkages
Prompted library to conduct collection assessments

POWERFUL PARTNERS

Increased collaboration between schools and public libraries /////
Attendance at workshops and meetings resulted in ideas for serving youth and provided a
springboard for other activities ///
Resulted in a partnership that will continue
Encouraged library to think/act on outreach and collaboration with other agencies
How to write grants and collaboration

VERY BEST PLACE TO START

Good message/slogan //
Great idea //
Communication plan is needed but changes are needed in developing one
Start Me Up materials useful
Idea of statewide marketing excellent
Good start
Unified message
Good information on how to do PR campaign
Brought school age (younger and middle school) kids into library

Kids saw library as pleasant and exciting place.
Broadened conception of what library is among future teenagers and voters
Kids aware of libraries and services in new ways
Raised awareness of children and parents of library services
Challenged library to become the VBPTS

YOUNG ADULT OUTREACH

Plus for teens
Staff development/developmental needs of YA

MISCELLANEOUS

State Library offering assistance in preparing grants
Kids/parents offered training on Internet use
Family programs
Positive in that outreach to minority/low-income children, but it needs to be more fully developed
Library added computers.
Youth Services librarians trained & prepared good objectives but need to involve the right people to make it happen.
Improve access.
Happy meal with top in the box provided a hook to bring youth in.
Market research very interesting, useful
Those who came first time came back.

What Could Be Improved

COLLECTION DEVELOPMENT GRANTS

Matching funds a problem ///
More CDG \$ ///
Needed multiple copies, not enough \$
Better info to applicants about types of local match
Collaborative collection development with public libraries and schools

POWERFUL PARTNERS

Resistance to collaboration
More collaboration between schools and public libraries needed //

VERY BEST PLACE TO START

Too few children received prizes. //
Not measurable //
Needs to be rethought

Not effective

Dump VBPTS campaign

Colors not high impact

Material rich/concept poor

Coordinate VBPS with ALA's @Your Library campaign.

Extend Howard McGinn's program...use celebrities.

Money:

Too much money spent //

Trustees felt that not enough bang for the bucks spent.

Money wasted

Planning & Communication:

Not enough local involvement in planning /////

Imposed w/o local input

Need to involve the movers and shakers

Need to work with key people for planning

Lack of communication

Not enough long range planning

Kick-off dates not checked for conflicts/existing activities

Timing & Continuity:

Implemented too quickly /////

Timing for school libraries was terrible ///

Not much carryover; is it still going on? Needs to be ongoing //

Need continuous training for PR

More follow-up on SMU campaign

Use of the media:

More print, radio, TV ads ///

TV ad disliked

Ad campaign did not respond to local cultural context.

Statewide emphasis is not valuable for local area.

Not many media outlets for smaller libraries

More TV & radio ads, less paper

Should have bought air time

Haven't seen any publicity

MISCELLANEOUS

Not much variety for public library to choose from for children's programming

Focus should be on getting children into library.

Difficult to reach teens

Bring in community colleges which have early childhood programs, Hispanic, day care centers, ESL.

Public and school libraries encouraged to speak up for each other in budget situations

Increased support for libraries (not just grants)
Community-based long range plan for youth services
Serving other professionals who work with kids
Public library more involved in teaching kids to read
Family literacy programs

Grant process:

School libraries did not receive necessary info, or didn't make it to the right person

///

Need to market info on grants to schools //

Grant application too time consuming

An LSTA priority is underserved, but only program was for Hispanic
CE/Training.

Continue expressing need for MLS

Need resources to teach evaluative skills to users

Offer advocacy workshops for school librarian.

More YA staff development

CE to bring public library and schools together

Staff development in "soft skills" (puppet shows/storytelling)

**PART III
SUPPORTING MATERIALS**

F. Tabulation of Needs and Priorities for the Next LSTA Plan from Regional Meetings

At the Regional Meetings, participants were asked to write needs and priorities for the next LSTA plan on individual 3x5 sticky notes. They were asked to indicate for each need or priority the difference that would make for users. Notes were posted on newsprint pads and arranged by theme by the group. All these needs and priorities have been categorized here, and the 12 categories are listed in the order of those receiving the most comments (except Miscellaneous).

Slashes (/) represent repeated needs or priorities that were equivalent.

The number of times the topic was mentioned by meeting participants is recorded in parentheses.

The categories of needs and priorities are:

- Continue and Expand Programs of Outreach to Underserved (103)
- Hardware and Software (93)
- Training (85)
- LSTA Mechanics (70)
- Expand Collection Development (62)
- Expand/Promote NC LIVE, NC ECHO, FIND NC (50)
- Public Relations (48)
- Continue to Promote Collaboration (43)
- Electronic Access to Collections/Improved Inter-Library Loan (33)
- Technology Support (24)
- Funding for Increased Bandwidth (15)
- Miscellaneous and State Library Role (21)

Continue and Expand Programs of Outreach to Underserved

Various underserved populations were suggested as the focus of grant funds (not just Hispanic)

- * Hispanics //////////////////////////////////////
- * Seniors /////
- * Poor /////
- * Teens ////
- * Persons with disabilities ///
- * Rural ///
- * Asian //

- * Literacy //
- * Native Americans //
- * Non-users //

Various types of outreach activities were suggested

- * Collection development ////////////////
- * Staff CE workshops re: serving special populations //////
- * Programming ////
- * More staff to do outreach and programming ///
- * Expand outreach grants to other types of libraries. ///
- * Make special collections available electronically. //
- * Assistive devices //
- * More educational, social & information services
- * Transportation
- * Forming/Funding a consortium of libraries to help staff meet the needs of low-income population
- * Organize an annual Spanish Book Fair for Libraries to purchase materials to serve Hispanic community.
- * Translate library informational materials like brochure.
- * Provide Spanish classes for library staff.
- * Bilingual consultants to help local library do some planning with Hispanic community
- * Make user friendly (esp. technology).
- * Find ways to reach library nonusers and seldom users.
- * Outreach vehicles
- * Foreign language computers/software
- * Allow non-English speaking patrons to access information services in native language.
- * User access to people who can't get to library
- * Information literacy as a priority
- * Refocus objective 2.3 & integrate it into Goal 3 - use schools which have a "captive" Hispanic American audience, thereby reaching both goals simultaneously.

Impact on users

- * Access to information - same access that others enjoy
- * Reach those who need it the most.
- * Access to resources, connection with community services, language and cultural exchange/education

Hardware and Software

- * Funding for computer/peripheral upgrades ////////////////////////////////////////////////////
(Many worries about replacing Gates computers)
- * Funding for upgrading automation system ////////////////

- * Support for purchasing computers /////
 - Have multiple platforms available - PC, Mac, Power Mac.
- * Bookmobile that is equipped to take computers and electronic resources and Internet access to remote areas ///
- * Computers for school media centers ///
- * Computer furniture ///
- * Basic equipment grants ///
- * Technology purchases other than computers //
 - LCD
 - DVD
 - E-books
- * Match requirements ///
- * Software upgrades ///
- * Laptops (for circulation) //
 - Expand computer access into community centers such as agencies, day care/after school care programs/senior citizen gatherings. //
- * Peripherals
 - Color printers
 - Headphones //
- * Include branch libraries in automation. //
- * Software purchases /
 - Counting software //
- * Standards
 - Objective 2.1 of the background paper says all but one of the state's public libraries meet minimum standards. Automation standards 4.7, 5.1 2, and 3, graphical interface, Internet access using TCP / IP etc. are listed as must haves - Gaylord Text based systems don't meet those standards. How many do we still have in NC - only one?
 - Standards need to be revised upward to reflect the need for more computers. //
 - Need standards for and hardware to support Americans with Disabilities Act
- * Training on:
 - E-books
 - Information and assistance for implementing planned upgrades of equipment
 - New technology
- * Extend hardware grants currently available to public libraries and academic libraries.
- * Build information infrastructure.

Impact on Users

- * All users benefit because access is easier and lower interlibrary loan expenses. (*refers to e-books*)
- * More access to online resources for users
- * Equitable access

- * Faster, easier access to resources
- * Will subject patrons to lower radiation and are also more energy efficient (*refers to newer equipment*)
- * Keep quality of Internet access at a high level.
- * Meet needs of those who can't afford technology.
- * Narrow the digital divide with easier access. (*refers to outreach into community*)

Training

- * For staff in:
 - Technology changes & skills/resources ////////////////
 - Internet/Web based resources //////
 - *-specific subject areas - Legal Literature
 - Master Trainer //////
 - Up-to-date knowledge & skills ///
 - NC LIVE ///(especially resource management) /
 - Basic reference skills/sources incl. print ///
 - Technical expertise for computer maintenance (Basic) ///
 - How to work with individual patron //
 - Computer basics //
 - Basic use of programs
 - At lower level than Master Trainer, shorter programs
 - Master Trainer Program - to staff and taken as a structured class offered to public
 - Children/teen technology services
 - VBPTS
 - NC WIN - Online staff development
 - The basics
 - How to train others
 - Helping users with computer questions and problems
 - How to work with group
 - Programming for youth
 - Automation software: i.e. how to run inventory, reports.
 - On-site technology trainer (within the region); possibility of collaboration with the local community college. Have them come to the library to train staff in course they teach on campus - but maybe waive the fee.
 - Currency for Technology - web pages/support for technology training and upkeep
 - Develop skills in staff to manage technological problems. Is a need for funding for more staff support for new technology. A goal to keep all equipment up and running would allow more users access to technology and staff would have more time to help patrons.
 - Training to set-up computers to replicate Gates computers
 - Continue CE/training/Master Training Program.

Staff to be trained includes:

- new staff (continuous training to address turnover) //
- school librarians / media coordinators
- paraprofessionals
- teachers
- library administrators

Train the public on:

- Internet/web resources ///

State funding for:

- * "In-system" training/grants to libraries to hire an outside trainer to train library staff to: //
 - catch-up for staff on all the systems and software installed recently
 - better assist the public to use the Internet
 - improve public service skills readers advisory
- * Leadership training conferences
- * Pay for tuition/training costs of personnel to receive CE work toward degrees of accreditation -- for better trained, more confident staff; leading to better salaries; libraries & funding bodies could come up with.
- * Community college training for staff in technology
- * Local training for staff
- * Small grants to bring master trainer in for program or series at institution for a group of local libraries; small places may not have travel budget.
- * Travel money to attend workshops, conferences to keep abreast of technology
- * EST Annual Workshop Program for Library Trustees to brief them on library technology issues/ current awareness
- * Development of more training tools "in house" and increase the "ripple effect" of learning with staff. This year staff created 48 pathfinders through 16 staff training sessions; library HQ bound and shared all pathfinders with all participants as follow-up training.
- * State library website - training at your own pace
- * Send out instructors using lab.
- * State Library can put together kit: To include 10 - 12 laptops and local libraries could check out the "kit" to hold training classes for Senior Citizens and other groups (staff, etc.).
- * Expand/better utilize Master Trainer Program -directory/registry – “who's good at what.”

Impact on Users

- *Users would find qualified staff to help them find what they need. More patron satisfaction //////////////

- * Better use of computer time / relieves professional of patron instruction. Cements relationship w/patrons. Public libraries become a more vital element of the community (*refers to training the public in Internet use*) /// Volunteers could repay the library by teaching and helping other patrons.
- * For users this would keep the computer "down time" to a minimum. (*refers to equipment maintenance staff CE*) ///
- * Internet access, NC LIVE access are not as effective as possible for users if library staff aren't capable and efficient in using them and showing others how use them.
- * Users have information overload; need to focus on good sites. (*refers to training on finding and selecting specific web resources*)
- * Increased usage (*refers to patron training*)
- * Patrons will become more competent computer users. (*refers to helping library staff train patrons*)
- * Better orientations, better reference service (referring to expanding Master Trainer directory)
- * To allow library to maintain catalogs better for patron availability (*refers to automation training for inventory control*)

LSTA Mechanics

- * Better communication //////////////
 - provide information on how to obtain matching funds
 - about the entire LSTA grant program ///
 - concerning workshops available from LSTA //
 - workshop on what you are looking for on the application
 - recruit grant applicants ///
 - target underserved libraries
 - media specialists don't get much information on LSTA programs
- * Flexibility within parameters of LSTA programs:
 - longer timelines/multi year project grants //////////////
 - simplified application/continue "Letter of Intent" process to reduce paperwork
////////
 - more local initiatives and projects - This could be done with statewide priorities and more local input meeting local needs. //////////////
 - more flexible grants guidelines ///
 - longer lead times in application process //
 - free and reduced lunches not good indicator for high school grant needs //
 - focus on innovation for: //
 - technical grants
 - underserved

- distribute dollars for local initiatives (like marketing) that are not competitive! //
- de-emphasize/eliminate competitive grants //
- eliminate "planning" grants as prerequisites for funds
- reduce amount of financial data required of grants for schools
- LSTA application in the fall (October 30) as well as spring for schools
- allow funding for staff
- * Better overall program evaluation & communication
 - better reporting of LSTA activities/results to libraries //
 - measurable objectives
 - better data
 - better stories
 - better/more feedback, e. g. types, brands of library automation, types of infrastructure, types of connectivity to have better, cheaper, and more service by using leverage of user group coming together ex. A server farm, etc.
- * Schools should have access to more aspects of LSTA goals. //
- * Quit spending money on outside consultants. //
- * Revert to LSCA to make directors of public libraries happy.
- * Require matching dollars for other areas, not just the school collection area.
- * Give more resources to statewide projects such as OCLC and less to individual grants.

Expand Collection Development

- * CD grants //////////
- * CD \$ for school libraries //////////
- * CD \$ for public libraries ////
- * CD grants not restricted to one year ////
- * No matching requirements for CD grants ///
- * CD \$ for community colleges //
- * CD \$ for these topics:
 - Children's collections ///
 - Non-print ///
 - Hispanic //
 - Accelerated readers
 - Asian
 - Elderly
 - 1st rate technology print
 - Homeschoolers
 - Large print
 - New technology
 - Science

- YA
- * CD \$ for these locations:
 - Charter schools
 - Underserved/rural
 - Wealthy communities who cannot find materials ex. after the flood
- * CD grants for present year as school media centers do not have projected budgets for the coming year //
- * Foreign Language Collection Sharing
- * School Library Collection Development Grants - provide new, updated non-fiction collection
- * Enable schools to apply for grants that could enable purchase of multi-media collections; multi-cultural; Hispanic and French multi-media collection development audio book, DVD and CDs.
- *Support for analysis consortium holdings
- *Using technology to help develop a Job Center to focus on resources of young people and those wanting to change careers
- * Funds for preservation of local collections
- * CD grants based on need
- * Continue matching requirement.
- * Reduce matching requirement.

Impact on Users

- * Need for books still exists; older users more comfortable with books; some benefits of books outweigh benefits on digital information.
- * Help patrons stay informed and provide resources for self-instruction.
- * Patrons would become familiar with new technologies and that would enable them to make better contributions to enrich their own and others' lifestyles.
- * Support YA educational and recreational needs.
- * Improved access to quality books - more accurate information, more attractive, writing resources

Expand/Promote NC LIVE, NC ECHO, FIND NC

- * Merge NC LIVE / Wise Owl. ////////// (Include public schools.)
- * Continue efforts to identify and digitize special collections (including "local collections"). /////
- * Continue to enhance NC LIVE resource capabilities. ////
 - NC LIVE needs stock information - Valueline, Morningstar.
 - Mechanism to allow libraries to make suggestions/vote for needed databases
 - More resources for kids on NC LIVE
 - Complete the index of Daily Dispatch (newspaper).
- * Expansion of NC LIVE, FIND, ECHO, resources for public ////

- * More promotion
 - NC LIVE /// (statewide/TV)
 - Develop a commercial public information that promotes NC LIVE, NC Wise Owl, NC ECHO, FIND NC in a single promotion.
 - Market FIND NC.
- * Use LSTA dollars to create a more user friendly, easy access to NC LIVE. //
- * Continue to provide access to online databases such as NC LIVE.
- * Eliminate pockets/areas that are not able to access NC LIVE components.
- * Subsidies for online databases not offered on NC LIVE
- * Develop a statewide network for Internet access like SAILOR (Maryland's project); then do ILL.
- * Training:
 - Basic NC LIVE training for support staff, hands on, real-world examples
 - Workshops to help local libraries build/link to local community information web pages
- * FIND NC - How different from NC.GOV? State Library coordinate all efforts?
- * FIND NC as standard access for government information - possibly a process to update and expand
- * Better statewide reference service
- * Provide access to local, unique materials; items held by a single library. This would expand the range of information available to users and assisting information sharing among libraries.
- * Expand availability of full-text and image databases from N.C. sources
- * Project to help libraries digitize "non-specialized" parts of collections, or, at least, set state standards
- * Digitize everybody's stuff!
- * Build NC ECHO digital collections. Fund regional scanning centers.
- * Creating more statewide portals to specific information sources (such as FIND NC) so libraries have standard access to quality Internet resources

Impact on Users

- * Equitable access to information
- * Will help users become more efficient at finding information
- * All NC citizens will share in the wealth of cultural resources. This site also could stimulate tourism.
- * Library staff and patrons more aware of it and more likely to remember it when have a need
- * Expanded resources available to users
- * Users can access documents in electronic form from anywhere.

Public Relations

- * Do statewide marketing. ///
- * More statewide marketing - More real-life stories, testimonials. "I'm convinced we would have fewer budget problems if we were more visible."
- * Fund more advertising to develop a community awareness of the library's resources. //
 - Radio //
 - TV //
 - Billboards
 - Information brochures
- * PR campaign that better serves community - i.e. TV ads featuring sports figures, business and government leaders - also billboards, etc.
- * Fund publicity for library services to: //
 - Tell what your library can and will do for you - emphasis on variety of services. Too many people think you only borrow books to read from libraries. //
 - Encourage special populations to use resources.
 - Fund concentrated initiatives in low wealth counties for children and adults to use resources in libraries.
 - PR to reach adults
- * Publicity and information about using netLibrary
 - Sponsor advocacy workshops, teach librarians to lobby for support and funding, use research based arguments, improved test scores in school, etc. Involve users in awareness campaigns. //
- * Youth Services Grants - This area needs work - spend money for direct service to children grant for youth services person would be helpful.
- * Include Community Colleges in Stakeholders Group working for children and teens because cc's serve Hispanics and dual enrollment high school students, Hispanic moms & kids, ESL students, kids at day care centers; teach library technical assistants, daycare workers, teachers. This would broaden and expand the linkages between agencies that work with children & teens, provide more seamless transition between services, and allow librarians to plan more effectively and share resources.
- * Revisit what we really meant during the last focus groups when we told you we needed help with publicity.
- * Create a state-level committee of public housing residents to identify ways to effectively market libraries to their neighbors. This is traditionally a difficult user group to get to the libraries. Any increase in use by this group would be a coup for the library and potentially a break through perception of the library as the Very Best Place to Start.

VBPTS-What was good

- * Contest
- * Follow-up/continue with Very Best Place to Start. Branding thing important. Continue logo/message. ///

- * Expand "Best place to start" program to include other types of libraries and patrons.

Suggested VBPTS improvements

- * Should be in fall //
- * Combine Best Place with ALA Media Program. //
- * Target activities to different age groups. //
- * Better graphics, promotional materials //
- * Dump VBPTS //
- * Refocus and revitalize VBPS campaign as ongoing, long-term goal. //
- * Consider cost.
- * Consider timelines.
- * Plan statewide programs that benefit all libraries, not just a few as was done this year.
- * Best Place to Start has fizzled out.
- * Involve stakeholders above the grassroots level and outside the library community.

Impact for users

- * Heighten awareness of the value of those who serve youth (a non-voting public).
- * Better public understanding and appreciation of libraries and librarians
- * Users begin to think of the library as the place to go for answers.
- * Teaching children to use the public library
- * Make patrons more aware of value of library and resources available.

Continue to Promote Collaboration

General

- * Continued support of multi-type, multi-partner collaboration ////
- * Comprehensive program of collaboration and cooperation (everything comes from one pot)- state library, academic libraries, school libraries should be seamless; e. g., Manpower to open schools in evening to provide access to joint resources (NC LIVE/NC Wise Owl)
- * Development of multi-type library consortia at the local/regional level
- * A closer affiliation with public school libraries, the goal being the creation of lifelong learners

Resource-sharing

- * More shared links between public library and public school/private school community colleges- for more effective use of all resources to meet a patrons' needs //
- * Encourage collection development between public libraries and public schools - schools concentrate on curriculum support and public libraries provide rotating general interest (fiction, etc.) materials.

Incentives

- * Continue Powerful Partners. //
- * Expand Powerful Partners to other types of libraries. //
- * Grants for expanding use of school libraries as public libraries with hours convenient to public //

- * Collaboration Grants - This will establish/strengthen relationship between community leaders.
- * Real incentives for inter library cooperation (school and public)
- * Funding for public schools for Powerful Partners Basics Workshops
- * Grants to facilitate institutional, local and state disasters preparedness and recovery plans

Opportunities to Meet/Plan/Learn Together

- * Need continued leadership by the State Library acting as a catalyst and providing forums during which school and public librarians can come together to focus on services to children and youth.
///
- * Provide a way for school librarians to meet with public librarians. This could be done by providing substitute pay. //
- * Process to bring libraries from all types of libraries together regularly (schools, public, community college, academic) //

Communication

- * Need more regular communication between schools and public libraries - information on assignments, reading lists, curriculum so public libraries could better support the school curriculum, shared goals, programs, & public relations. //
- * Better communications concerning workshops; better communication to school media centers about possible grants
- * Better communication between types of libraries

Programming

- * Focus Youth, YA
- * Programs for students, funding paid presenters, etc.

Impact on Users

- * Better access to materials for patrons //
- * Expanded service in collections, hours of service, and within users home community //
- * See libraries as mutually supportive, not as competitors for same few dollars; see libraries as great resources, regardless of "name" (public, academic, etc.).
- * Increased support for libraries; better library services at schools and public libraries
- * Keeping people connected to libraries throughout life by starting Pre-K
- * Users will only have access to collections that survive or are restored after disasters strike. (*refers to grants for disaster preparedness*)

Electronic Access to Collections/Improved Inter-Library Loan

- * Everyone full-users of OCLC ////
- * Updating OCLC database so information about collections can be more current ////
- * Use LSTA dollars to load every library's holdings on OCLC. //
- * More resources to large statewide projects such as OCLC participation

- * Costs of OCLC batchloading in subsequent years
- * SOLINET/OCLC costs paid by LSTA
- * Assist libraries in downloading new records to SOLINET/OCLC.
- * Need funding of OCLC charges for libraries to provide equal access to collections across the state
- * We need a Z39.50 project (such as Texas) built in to NCLIN so that member libraries can share MARC records and other database information statewide.
- * Gather Z39.50 info on willing libraries and publish so that it is easier to set up local simultaneous searching etc. using power of our OPACs .
- * Union Catalog
- * Promote union catalogs of school systems' holdings.
- * Retrospective Conversion support for items beyond the core collections
- * Retrospective Conversion to allow libraries to know what is available in the region to better serve patrons and to promote sharing
- * Retrospective conversion of special collections
- * Training and hardware/software to create and maintain customized library web portal
- * Assistance in creating electronic records for special collections material; potential users could find the information in standard databases, e.g. WorldCat
- *ILL Process:
 - Make informational documents available, models of ideal ILL practices for local libraries to use, for consortia to use.
 - Look at ILL charges - who charges/who does not: requirement of grant participants not to charge, but what about those who do charge
 - Assistance in purchasing/setting up ILL system like Ariel; to reduce ILL turnaround, allow library to cope with greater volume of requests
 - Provide model ILL work-flows to handle record-keeping, statistics, copyright; to speed up service to patrons, reduce learning curves at library;
 - Electronic access to all for ILL = more equitable lending
 - Making collections at high schools, public library and community college accessible online
 - Expanded ILL service across state with no direct borrowing or photocopying fees Now that patrons have online access to who has what, they should be able to get it!!!
 - Facilitate borrowing of resources from one school library to another - even within same school system to benefit student teachers and folks supporting them.

Impact on Users

- * Better catalog so patrons have more up-to-date info.
- * Access to a statewide virtual union catalogue which will be uniform and standardized no matter what library they are using (*refers to Z39.50*)
- * Access to materials in other schools
- * ILL access to holding of all public libraries - more materials, closer to user

- * Ability to perform focused searches, using recommended search engines and tools, and ready access to community information and links to state resources (*refers to customized web portal*)

Technology Support

Technology Experts

- * Consultants to assist various libraries in a variety of tech needs //
- * Technology specialist "circuit rider" //
- * Funding to hire technology expert/trainer to permanently work at libraries in local area (Not a consultant! Would support local area) //
- * Need / another person at State Library with Grant Pair's knowledge, able to travel to libraries to advise them //
- * Provide visionaries in the technology field to 'foresee' and promote advances.
- * Help libraries recruit trained "techies."
- * Promote sharing of technical staff.

Miscellaneous Technology Projects

- * Promote creation of and access to local data/websites.
- * Continued support of digitization projects
- * Extend resources sharing by provision of funds for document delivery (courier, mail, electronic transmission and equipment, e.g.).
- * Ongoing support for internet access
- * Statewide networked automations systems linked same system statewide
- * Development of community intranet - that is assisting library to play leadership role in development of electronic village
- * Computer Software / MS Office Products

Planning

- * Continue strategic planning grants to aid public libraries in funding, planning and automation consultants. //

Standards

- * Revise/update minimum standards on a regular basis and find some way to encourage assistance of local systems administrators (it took us months for them to hook everything up/community college). //
- * Develop standards for digital and virtual collections and services.

Equipment Upgrades

- * Computer for internet access aging - replacement help - user expectations and NC LIVE require more capability; matching funds?

Impact on Users

- * Equitable access to electronic resources across the state
- * Patrons will experience fewer technical problems with computers.
- * Users would benefit from a well-trained staff that is knowledgeable about technology and how to make optimum use of it to find what they need.

Funding for Increased Bandwidth

- * More/better/faster connectivity/increased bandwidth/direct access //////////////
- * T1 lines for each library - NCSL staff do e-rate applications ////

Impact on Users

- * Increase in server speed or Internet access will allow users to more effectively search for information.

Miscellaneous and State Library Role

- * Access to the Internet:
 - State Library take active role with Department of Public Instruction in getting critical thinking skills/information literacy emphasized in K-12. Everything on the Internet is not acceptable/validated information.
 - Child safety on the Internet, technical assistance to libraries to provide "child-safe" workstations
 - My Library @ project open to all libraries
 - Continue to encourage access for least "wired" groups.
 - Assist rural areas used a lot by tourists with providing e-mail access, and market this. Tourism is a big industry for the state. Positive service/gets people into libraries.
- * Increased Communication:
 - State Library monitor, evaluate, and report on legislation on electronic copyright, filtering, acceptable use standards that affect (effect/sic) NC library community.
 - Listserv for public schools
- * Planning & Evaluation:
 - Assistance with planning (e.g. planning grants) for public libraries
 - Need statewide consensus of how to respond to federal statistical reports for assessments to be meaningful
 - Show correlation between libraries and educational success. How to measure? Prove students with good libraries are better students.

- Some of us in community colleges think we might benefit from some statewide planning to build a stronger community of libraries within the NCCC system. We are too isolated, too separated.
- * Statewide Library Card: Public library patrons can use any library across the state; extra costs subsidized by LSTA funds. //
- * Funding for personnel to implement services - additional staff would facilitate the use of new technology, Internet, and materials. ////
- * Web page development:
 - Local web page publishing assistance
 - Subsidize library employee time on web page updating.
- * Funding to provide assistance to libraries to support educational/research needs of patrons with new technology - "We serve our patrons with their unique needs."
- * We need to consider how we can provide, improve, increase library services to charter school/home schooled students - Increase access to information for all students

Impact on Users

- * Faster and better access to print materials for patrons
- * More consistency in quality of library and information services for students and faculty. (*refers to community college planning*)
- * Increased access by children whose parents do not provide signed permission to use Internet. (*refers to child safety on Internet*)

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PART III: SUPPORTING MATERIALS
G. North Carolina LSTA Programs and Expenditures, 1997-2000

Grants to Libraries	Public Libraries		Comm College Libs		Indep Academic		UNC - Acad		School Libraries		Totals	
	# grants	\$\$	# grants	\$\$	# grants	\$\$	# grants	\$\$	# grants	\$\$	# grants	\$\$
Automated System	13	\$ 1,191,830			4	\$ 407,882					17	\$ 1,599,712
Automation Planning	17	\$ 185,270			1	\$ 15,000					18	\$ 200,270
Basic Equipment	77	\$ 655,100	48	\$ 436,799	15	\$ 124,611	1	\$ 6,081			141	\$ 1,222,591
Enhanced Connectivity	30	\$ 1,068,660	5	\$ 144,219	3	\$ 70,861					38	\$ 1,283,740
Retrospective Conversion	8	\$ 136,776	1	\$ 50,000	8	\$ 209,797					17	\$ 396,573
Planning Mini	10	\$ 99,376									10	\$ 99,376
School Library Collection Development									153	\$ 811,171	153	\$ 811,171
Totals	155	\$ 3,337,012	54	\$ 631,018	31	\$ 828,151	1	\$ 6,081	153	\$ 811,171	394	\$ 5,613,433
Statewide Leadership Grant Projects											Goal	
Planning for a Statewide Network of Libraries											1	\$ 62,822
Master Trainer Project											1 & 2	\$ 106,476
Continuing Education for Technology											1 & 2	\$ 122,002
Training for NC LIVE											1 & 2	\$ 117,249
Batchloading											1	\$ 906,044
Access to Special Collections - A Planning Project											1	\$ 47,111
Access to Special Collection (NC ECHO)											1	\$ 272,335
Includes 3 Demonstration Grants, total \$200,000: 1 Indep Acad, 1 UNC Acad, 1 School (DPI)												
NetLibrary											1	\$ 288,000
Hispanic Services											2	\$ 143,620
Includes 12 Hispanic Services Mini-Grants, total \$69689 to public libraries												
Public Library Statistical Survey Automation Project (Bibliostat)											2	\$ 23,250
Libraries & Librarians as Leaders & Powerful Partners											3	\$ 396,617
Includes 30 Powerful Partners Mini-grants, total \$13,300 to 22 Public & 8 School Libraries												
Includes 13 Powerful Partners Collaboration Grants, total \$344,824 to 11 public & 2 school libraries												
Youth Services Assessment & Planning Project (YSAP)											3	\$ 26,743
YSAP/Strategic Communications Research & Planning											3	\$ 252,347
Libraries: The Very Best Place to Start											3	\$ 962,117
Developmental Needs of Youth											3	\$ 24,273
MyLibrary@ Project											4	\$ 21,853
NC State Government Information / NC GILS											4	\$ 48,312
Administration of LSTA												\$ 242,753
Total												\$ 4,063,924

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PART IV APPENDICES

A. *Template for an Evaluation Report on an LSTA Objective (Evaluation period: July 1, 1997 to December 31, 2000)*

Examples follow each item.

Go back to the Goal and make a statement about the intention (spirit) of the objective. A brief historical note may be appropriate here to help the objective make sense.

For example, an evaluation report on Objective 2.4 might say:

“Objective 2.4 states that ‘Public library managers have the resources and skills they need to plan and evaluate library services.’ This objective is in pursuit of the goal of Achieving Equity in Public Library Service with its Vision for Success: ‘Every North Carolinian has ready access to public library services that meet a consistent level of quality statewide.’ Skill in the planning and evaluation of library services is seen as necessary to ensure quality library services with statewide consistency.”

I know this will be repetitious in a final evaluation document, but it is useful here to be explicit about the connection between the goal and a given objective.

Describe the activities that have taken place during the evaluation period (1997-2000). [Many of these will come from the Key Strategies section.]

Include in the activities the dates on which they occurred and, where readily available, indications of quantity, such as number of attendees, number of grants, and the like. Where numbers are not readily available, you can use your best estimates, signaled by the use of “approximately” or “an estimated __#__ of participants.”

For example, again for Objective 2.4:

“Some of the activities conducted in support of this objective were: Funding of a mini-grant program to provide consulting and technical assistance in planning. In 199_, 4 grants were awarded (2 for general planning and 2 for technology planning), and in 199_, 6 grants were awarded (3 for general planning and 3 for technology planning.)

Provision of continuing education and technical assistance in 199_-2000 for approximately __#__ public library staff to support local planning efforts and preparation of technology plans....”

Provide information on each of the Outcome Measures and Benchmarks:

What was measured?

For Benchmark 2.4.1.1: The number of public library systems in 2000 with a long-range plan of service.

How was it measured?

Receipt of long-range plans from public library systems by SLNC.

Result as of the end of 2000:

As of (date), ___#___ public library systems had provided SLNC with acceptable long-range plans.

[Comparison with a result from an earlier time, if appropriate and available.]

Brief commentary or reflections on the above. Possibly a suggestion for next directions, but not advocacy.

“While the outcome measure of every public library system in North Carolina having a long-range plan for library service has been met, the plans submitted exhibit a broad range of quality, suggesting a continuing need to improve the skills of public library managers in planning and evaluation....”

Please give us feedback on the evaluation process:

What worked well for you as you produced this evaluation report?
What changes in this approach would you suggest for the next planning cycle?

**PART IV
APPENDICES**

B. Evaluation Form Used at Regional Meetings

State Library of North Carolina

LSTA REGIONAL MEETING EVALUATION
April 18-24, 2001

1. To what extent has this meeting increased your understanding of LSTA programs in North Carolina over the last three years? [PLEASE CIRCLE ONE]

A Great Deal				Not At All
5	4	3	2	1

2. If you still have questions about the LSTA program in North Carolina, please note them here:

3. To what degree did the meeting help you to identify the North Carolina LSTA programs that have made a difference for North Carolina libraries and their users? [PLEASE CIRCLE ONE]

A Great Deal				Not At All
5	4	3	2	1

4. To what extent were you able to identify needs and priorities for the next 3-5 years to assist in developing the next LSTA Plan? [PLEASE CIRCLE ONE]

A Great Deal				Not At All
5	4	3	2	1

5. If you have other needs and priorities to suggest, please note them here:

6. Please note here any other comments you have on this day's meeting:

Thank you for your participation today!

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PART IV APPENDICES

C. Access to North Carolina's Special Collections: Vision, Principles, and Strategic Directions

Our Vision

All of North Carolina's cultural institutions work together to make the state's unique cultural and historical resources accessible for the education and enjoyment of people of all ages in the state, nation, and the world.

Our Values and Guiding Principles

While it works to make this vision a reality, the Access to Special Collections Working Group and partners representing North Carolina's cultural institutions will be guided by the following principles:

1. Cultural institutions* support the democratic ideal of an informed, educated citizenry.
2. Source documents, works of art, and museum artifacts enhance education and the quality of life for everyone.
3. Cultural institutions seek to be inclusive, providing accessibility to their resources for all ages, while providing a voice for the diverse populations in the state.
4. Cultural institutions are continually growing and evolving, increasing the awareness of their rich resources and building new communities of users.
5. Cultural institutions use the appropriate technologies to create new ways to extend access and to preserve the state's cultural resources for current and future generations.
6. Cultural institutions add value to the resources in their collections by providing context to their materials, allowing individual users to better interpret for themselves the resources being presented.
7. Cooperation among cultural institutions allows each individual institution to determine the extent of their participation, respects the cultures of the different types of institutions, and recognizes that every institution has something to contribute.

* Any cultural institution (library, archive, museum, historic site, or organization), which maintains a permanent, non-living collection of unique materials held for research and/or exhibit purposes and open for the use of the public. Denominational/associational collections are included, but individual church collections are not. Art museums are included but galleries are not. Zoos, arboreta, and parks are not included unless, as a part of their mission, they hold collections described above.

8. Cooperation among cultural institutions involves working together in a focused way to share, as well as leverage, resources, strengthening the efforts of individual institutions and building greater connections between holdings, thereby enhancing their overall use.
9. Professionals in cultural institutions act responsibly and ethically and are objective in their provision of access and content. They are dedicated to achieving results, while being realistic about opportunities and challenges.

Strategic Directions

I. Discovery

Strategies in this area will assess the extent of the collections and resources of the state's cultural institutions, the current status of their preservation and access, and their needs and priorities while building an inter-institutional community.

1. *Identify and survey North Carolina's cultural repositories regarding holdings, staffing, collection use, etc.*
2. *Hold survey summary meetings and create other information sharing devices to inform those being surveyed regarding survey results, while allowing cultural caretakers to begin strengthening ties between different types of cultural institutions.*
3. *Begin to identify key collections that might be targets for resource support, especially those that could be components in collaborative projects.*

II. Access

Strategies in this area will improve access to the resources held by North Carolina's cultural institutions, with an emphasis on using new digital technologies and the Internet.

1. *Develop tools to make it easy for people to discover and use those resources, with an emphasis on those using new technologies.*
2. *Develop and promote techniques and tools that are appropriate for the cultural materials of the different communities of interest.*
3. *Provide appropriate contextual information for primary source materials (objects, art, and records) so users **might** better interpret and understand their cultural resources.*

III. Skills and Knowledge

Strategies in this area will equip cultural caretakers with the skills and information they need to collect, preserve, and provide access to the cultural resources of North Carolina.

1. *Use the World Wide Web and other online tools to inform and educate cultural caretakers.*
2. *Establish guidelines for acceptable practice and communicate them to the cultural community.*
3. *Use the survey process as an opportunity for teaching and learning.*

4. *Provide formal continuing education to increase skills and knowledge in the cultural community while **generating** a commitment to best practices.*

IV. Preservation

Strategies in this area will help cultural institutions maintain the resources entrusted to them, as well as the media created to provide greater access to those originals.

1. *Bring cultural caretakers together to identify opportunities for strengthening current preservation programs.*
2. *Identify best practices for preserving what has been duplicated in a digital format.*

V. Celebrate and Communicate

Strategies in this area will inform members of the cultural repository community, the general public, and the funding agencies of activities that are creating greater access to cultural materials, while drawing attention to the challenges faced by the partner institutions and celebrating their resources and the commitment of their custodians.

1. *Develop and implement a formal communications plan to inform potential partners, the general public and representatives of funding agencies about plans and activities.*
2. *Engage current and potential partners in “continuing conversations” about needs, issues, and plans to assure a responsive program that has broad support.*
3. *Remain open to exploring connections/collaborations with other states and organizations attempting similar programs.*
4. *Celebrate the resources and people who maintain them that we discover during the process.*
5. *Promote the work of cultural institutions.*

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PART IV APPENDICES

D. Glossary of Terms and Acronyms

AHEC-Area Health Education Center

ASCWG-Access to Special Collections Work Group-Created by the North Carolina State Library Commission to increase Internet access to the state's specialized resources (NC ECHO)

BEG-Basic Equipment Grant

CCLINC-Community College Libraries in North Carolina—a consortium of community college libraries sharing an automated system

ECG-Enhanced Connectivity Grant

ESL-English as a Second Language

FIND NC-State Library of North Carolina's electronic gateway to government information.

Gates Foundation-The Bill and Melinda Gates Foundation. The Foundation is providing almost \$5.4 million in computers and resources to North Carolina public libraries as part of the Foundation's Public Internet Initiative.

IMLS-Institute of Museum and Library Services

LEA-Local Education Agency. These agencies are local school systems or districts.

LITA-Library and Information Technology Association; a Division of the American Library Association

MARC-Machine Readable Cataloging

NC ECHO-Exploring Cultural Heritage Online-WWW doorway to the special collections of North Carolina's libraries, archives, and museums

NC GILS-Government Information Locator Service-Used for indexing FIND NC. Records are data that describe the electronic information in the web page and are analogous to cataloging records found in a traditional online or card catalog which describe and index books in a library.

NCLA-North Carolina Library Association

NC LIVE-A statewide electronic library project providing online access to complete articles from over 5,500 magazines, newspapers, and journals; two encyclopedias; 10,000 e-books; and indexing for over 10,000 periodical titles

NCSSM-North Carolina School of Science & Mathematics

NC Wise Owl- A web site sponsored by the North Carolina Department of Public Instruction for North Carolina's K-12 community—teachers, students, and parents—that has as its centerpiece several subscription databases

OCLC- Online Computer Library Center, Inc., a nonprofit membership organization providing automation-based services to libraries around the world

SLCD-School Library Collection Development (Grant)

SOLINET- Southeastern Library Network, a not-for-profit library cooperative providing resource sharing for ten southeastern states and the Caribbean, and responsible for distribution of OCLC services to libraries in the Southeast

VBPTS-Very Best Place to Start

YSAC- Youth Services Advisory Committee

Z39.50-an information retrieval protocol standard

PART IV APPENDICES

E. Numbers Found in North Carolina LSTA Evaluation (Statistics are for 1999-2000)

Higher education libraries

- Community college libraries—58
- Independent college & university libraries—42 (36 campuses)
- University of North Carolina System libraries—21 (16 campuses)

Master Trainer libraries—27 (8 academic & 19 public libraries)

NC LIVE libraries—188

NC cultural repositories—633

OCLC NC users—400+

Public libraries

- Public library outlets—372
- Public library systems —76
- *Central libraries—65
- *Branch libraries—307
- *Bookmobiles—45
- *Other mobile units—60

- Public libraries with integrated automated systems —75
- Public library outlets offering Internet access to the public—343

- *Public library staff—2,874 Full Time Equivalent employees
- *Public library registered borrowers—3,695,848
- *Public library total circulation—42,539,154
- *Public library interlibrary loan
 - Items Loaned—52,701
 - Items Borrowed—58,609
- *Public library Internet workstations—2,114

K-12 Schools

Private Schools

- Independent—187
- Religious—457
- Total—644

Public Schools

- Local Education Agencies (LEA), systems/districts—117
- Elementary schools (Grades PK-8)—1701
- Secondary schools (Grades 9-12)—327
- Combined—130
- Total—2,158

*State Population—7,650,699

- * From the State Library's website for year 99-00
- From the North Carolina Department of Public Instruction's website for year 99-00
- All other information from the evaluation reports as of December, 2000.

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PART IV APPENDICES

F. FAQ on LSTA Evaluation State Library of North Carolina April 2001

Why is the State Library conducting an evaluation?

The Library Services and Technology Act (LSTA) emphasizes accountability and evaluation to a greater degree than previous federal library programs. The law requires that the state library agency (i.e., the State Library of North Carolina) evaluate the progress it has made in implementing its LSTA plan by the end of the first five years of the act, which was signed into law on September 30, 1996.

What are you evaluating?

The federal Institute of Museum and Library Services issued guidelines for the evaluation process that require a two-tiered process:

1. An overall evaluation that describes the state's level of success in achieving the goals in its five-year plan; and
2. Specific goals, programs or groups of activities for more in-depth evaluation and reporting, including (a) one program that reflects providing services through technology and (b) a second that reflects targeted services to unserved and underserved populations.

The State Library selected two areas to emphasize in response to the second requirement: (a) Internet access for library users in public and academic libraries and (b) library services to children and teens in public and school libraries.

Working with North Carolina's LSTA Advisory Committee, the State Library of North Carolina has identified additional purposes of this evaluation:

1. How successful the State Library has been in moving from the LSCA program, which focused on public libraries, to a multi-type library program for all types of libraries that was also designed to support activities that were formerly funded by Higher Education Act grants for academic libraries. The State Library has tried to involve all types of libraries in a continuing planning/evaluation loop, using an incremental approach to widen the scope of libraries involved.
2. How successful have been the efforts of the last three years to promote conversation and collaboration across types of libraries, the numbers and qualities of collaborative relationships that have been developed.

3. How successful has North Carolina's LSTA plan and its implementation been in facilitating progress in meeting the needs that have been identified in the ongoing planning activities.
4. How the State Library can make sure that they perform evaluation in an on-going way. Determine what tools, formats, work forms are needed and how to continuously improve the planning/evaluation processes.
5. How North Carolina librarians evaluate the success of the current LSTA plan, what gaps they would identify in services, and what priorities they would select for LSTA support over the next 3-5 years.

How are you conducting the evaluation?

Reflecting the State Library's continuing commitment to stakeholder involvement, the evaluation process will include the LSTA Advisory Committee, the State Library Commission, and representatives of the state's library community. Douglas Zweizig will serve as the principal investigator for the evaluation with his colleague, Coral Swanson, and in cooperation with staff of the State Library of North Carolina.

Douglas Zweizig is Professor Emeritus in the School of Library and Information Studies at the University of Wisconsin-Madison. He came to that position in 1982 from King Research, Inc., a Washington-area consultant in information processing and policies, where he was Senior Research Associate. He has conducted national studies on adult literacy services provided by libraries, performance data for public libraries, public library involvement in the Internet, and school library media center adoption of innovative practices. In North Carolina, he has investigated continuing education for librarians and services for youth in public and school libraries.

Coral Swanson is an independent consultant specializing in planning, group facilitation, services to special needs populations, and grant writing. Prior to becoming an independent consultant, Coral was director and consultant for the Arrowhead Library System in Janesville, Wisconsin and director of the Milton (WI) Public Library.

The process will include both a review of existing data that is readily available on the impact of LSTA grants as well as input from participants at regional meetings. Public, academic, school, and special librarians have been invited to attend five all-day meetings in mid-April.

What is the timetable for the evaluation?

The consulting team began the evaluation in January 2001. The process will be completed and a full report submitted no later than June 30, 2001. Following submission of the evaluation report, the State Library will work to revise the LSTA plan by September 30, 2001. This means that grants awarded in 2002-2003 will be based on the new plan.