

Information Use Management and Policy Institute
College of Information, Florida State University

**INCREASING THE EFFECTIVENESS OF EVALUATION FOR
IMPROVED PUBLIC LIBRARY DECISION MAKING AND ADVOCACY:
JUNE 2007 INTERIM REPORT**

July 8, 2007

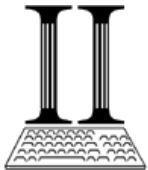
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INCREASING THE EFFECTIVENESS OF EVALUATION FOR IMPROVED PUBLIC LIBRARY DECISION MAKING AND ADVOCACY

In December 2005, the Information Use Management and Policy Institute (Information Institute) of Florida State University began work on the Institute of Museum and Library Services (IMLS) award entitled *Increasing the Effectiveness of Evaluation for Improved Public Library Decision Making and Advocacy*. This 30 month study began December 01, 2005 and ends July 01, 2008.

The goal of this project is to develop a web-based instructional learning system, an Evaluation Decision Making System (EDMS) that functions as a management support tool capable of facilitating the selection, use, and management of evaluation approaches given data/advocacy needs and specific situational factors of local public library managers. This interim report presents an overview of activities completed and in progress for this phase of the EDMS project (December 2006 – June 2007) for the current beta version of the EDMS.

EDMS ACTIVITY UPDATES

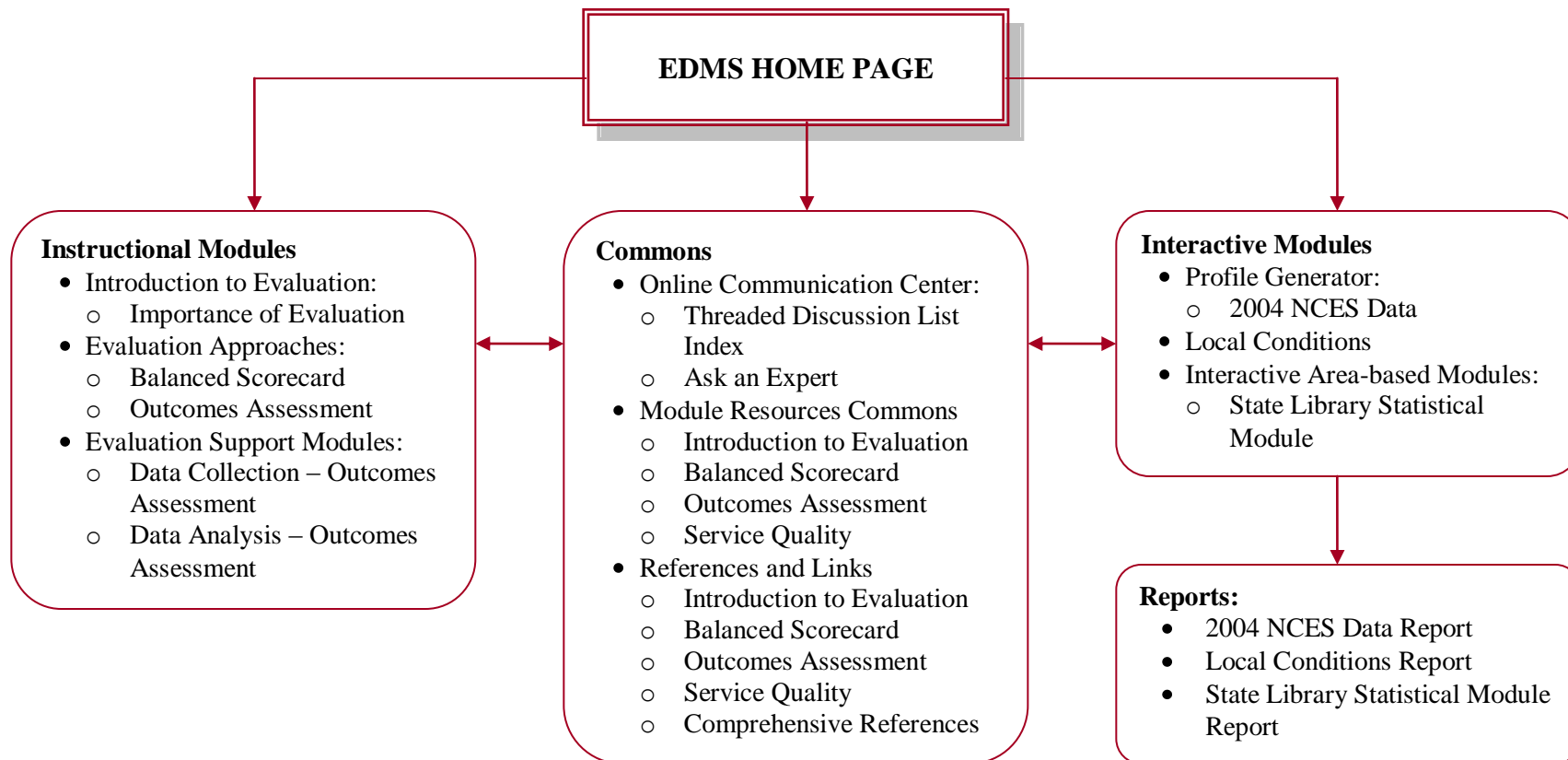
The current beta version of the EDMS consists of selected instructional modules, user interactive modules, and Commons areas developed as proof of concept of the design of the EDMS (http://www.libevaluation.com/edms_new). Activities relative to current and ongoing development of the EDMS beta version include:

- 1) Instructional modules developed to provide guidance for planning, managing, and conducting evaluations.
- 2) Interactive modules designed to provide local library specific data sources via an SQL database useful for report production and dissemination. User interactive modules present state and national level library data drawn from an SQL database. The SQL database contains 2006 NCES data and 2006 National Level Plinternet survey¹ data and presents sample data elements in a report template useful for library reporting and advocacy purposes.
- 3) Commons areas designed to include evaluation references, resources, report examples, and a communication center for interaction with other users of the system. Commons modules provide EDMS users access to evaluation resources and references, such as report templates, references/URLs, report examples, etc. and opportunities to interact with other users, such as access to evaluation experts and threaded discussion lists (i.e., using phpBB Open Source discussion forum software).

In addition, EDMS infrastructure activities include planned refinements of the current site based on initial evaluations conducted by the research team. Refinement includes the support structure for future implementation of modules in the instructional, interactive, and commons areas. Refinement also includes the design for interactivity between the SQL database and future added databases, i.e. 2005 NCES database (available fall 2007) and 2007 Plinternet database (available fall 2007). Figure 1 (below) presents an overview of the current EDMS.

¹ Data collected from national surveys. See *2004 and 2006 Public Libraries and the Internet Surveys* available 6 July 2007 at <http://www.ii.fsu.edu/projects/plinternet2004-2006/>.

FIGURE 1



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The research team, in conjunction with the technology subcontractor for the project, designed, developed, and implemented initial modules for each area of the EDMS from December 2006 through June 2007. The following lists present a brief overview of activities in each of the primary areas of development for the EDMS.

Infrastructure (framework) Development with Subcontractor²

1. Designed and developed layout for content and prepared paper version of the design layout. Reviewed and confirmed the layout design.
2. Implemented the initial test of the infrastructure design by integrating the SQL database into Coldfusion for presentation of the site.
3. Developed *Profile Generator* report templates for 2004 NCES data, 2006 Plinternet data, and 2007 NCES data updates in both PDF format and Word format. See Appendices A, B, and C for example reports for 2006 Plinternet data, 2004 NCES data, and Current NCES data collection.
4. Developed a Local Conditions report template for integration into future problem-based planning and management modules. See Appendix D for an example of the Local Conditions page.
5. Designed and developed both PDF and Word formats for the *State Library Statistical Module*.
6. Integrated phpBB discussion-forum software with Coldfusion to provide access to the phpBB-based threaded discussion area.
7. Created and integrated the *Ask an Expert* template for each of the instructional modules imbedded in the site (See http://www.libevaluation.com/edms%5Fnew/ask_expert.cfm).

Currently, the study team is continuing with the implementation of design modules, instructional modules, user interactive modules (using Cold Fusion programming and SQL to meet specific requirements), and elements of the EDMS Commons.

Instructional Module Development

1. Developed the EDMS homepage (Project Introduction), navigational tabs, and introductory/explanatory pages (internal links) for the instructional areas of the site.
2. Integrated three of four draft evaluation instructional modules for the beta version of the EDMS – *Introduction to Evaluation*, *Balanced Scorecard*, and *Outcomes Assessment*.
3. Integrated *Data Collection* and *Data Analysis* support modules for instructional modules.

Currently, the study team is completing and implementing the *Service Quality* instructional module, support-planning templates for the data collection and data analysis modules, and sample planning reports for outcomes assessment.

User Interactive Module Development

1. Developed navigational tabs, introductory content, and instructional content for the interactive modules.

² Paragon New Media, Inc., <http://www.pnmi.com>.

2. Designed, developed, and implemented the *Profile Generator* report template for selected data elements from the 2004 NCES database and the 2006 Plinternet database.
3. Developed and implemented content of template for initial budget-based local conditions and local situational factors test questions.

Currently, the study team is completing development and implementation of additional interactive modules based on advice from the partners and advisory committee and reviewing the integration progress of the SQL database into EDMS by the subcontractor.

Commons Development

1. Designed, developed, and implemented content for three areas in the EDMS Commons – *Online Communication Center*, *Module Resources Commons*, and *Module References and Links*.
2. Planned/populated the phpBB-based discussion forum and the *Ask an Expert* forms as part of the Commons *Online Communication Center*.
3. Developed and implemented resource lists for introduction and instructional modules in the *Module Resources Commons*. Resource lists include resources for the *Introduction to Evaluation*, *Balanced Scorecard*, *Outcomes Assessment*, and *Service Quality* modules.
4. Developed and implemented reference lists for the introduction and instructional *Module References and Links* area. Reference lists include references/URLs for the *Introduction to Evaluation*, *Balanced Scorecard*, *Outcomes Assessment*, *Service Quality*, and *Comprehensive Reference* modules.

Currently, the study team is continuing with the development and population of each of the areas of the Commons.

INITIAL EVALUATIONS OF THE EDMS

In addition to design, development, and implementation of initial modules for each area of the EDMS, the research team conducted initial evaluations of the site. The research team presented the EDMS site and conducted a focus group with members of the project Advisory Committee and Project Partners at the ALA Conference in Washington, D.C. on June 24, 2007 (See Appendix E for results).

Study team members also conducted an initial Website usability and functionality analysis of the current EDMS site to identify design issues and considerations of the infrastructure and content areas of the site (See Appendix F for results). The research team will apply the results of these initial evaluations to develop field-tests for the site and further refinement of the site. Full field-testing of the site will occur in the fall of 2007 instead of the summer of 2007 as originally planned due to implementation and development issues related to integration of the SQL database with Coldfusion software for interactive modules. Full field-testing will include additional modules implemented in each area of the EDMS. Further description of the field-testing follows in the *Next Steps* section (below).

SUMMARY

For the past six months of the project, the research team successfully designed, developed, and implemented modules, templates, reports, and communication components for each of the primary areas of the EDMS. Initial design and implementation of the Website's infrastructure for the beta version is in place and functional. The study team conducted an initial Website evaluation (See Appendix F) and the results of the evaluation will inform the next steps for the project, the refinement and field-testing of the EDMS site. The research team also met with members of the project Advisory Board and Partners to evaluate the current progress in the development of the EDMS. Results of the meeting provided positive inputs for the current state of the project and for the future development and direction of the project.

The instructional modules of the EDMS include a completed *Introduction to Evaluation* module, *Balanced Scorecard* and *Outcomes Assessment* instructional modules, and *Data Collection* and *Data Analysis* instructional modules as planned. The Commons area contains a functional threaded discussion area (i.e., the phpBB discussion-forum software) and a template for users to contact experts for each instructional module (i.e., the *Ask an Expert* templates). The study team also inserted the content for the *About Us* and *Contact Us* areas. The study team will continue to develop and proceed with the process of implementing additional instructional modules, support-planning templates, examples of evaluation plans and reports, and lists of resources and references per the original schedule for completion of these modules. Per the focus group, continued development will also include support tools and examples of actual evaluation practices in local libraries supplied by member libraries of the project's Advisory Committee and Project Partners.

The development of the interactive modules proved to be much more challenging than anticipated – requiring significantly more technical expertise and study team time than originally planned. Based on the advice from the partners and advisory committee at the Washington DC June meeting, the study team will revise the design criteria for the interactive problem-solving modules. As part of the future refinement of the site, the study team will develop modules designed to assist, give practical advice, and plan for selected types of evaluations rather than produce report-generating products for direct use by a participating library. The study team determined (both technically and intellectually) during its previous efforts in designing such modules that programming or anticipating the extent of potential situational factors affecting report development or dissemination for a particular library is unrealistic.

The study team completed the initial development of the infrastructure of the site and of forms created from the SQL database for the generation of data-driven reports. Examples of each type of interactive form are implemented and functional. The process of developing the site from the SQL database, however, took longer than anticipated, and because of this, completion of field-tests of the entire site did not occur in the anticipated timeline. Field-tests, however, will occur as soon as the current refinement stage of the EDMS is complete.

The study team anticipates that field-tests will occur in the fall of 2007, as opposed to the originally planned summer months. Training sessions and conference presentations will still occur in the spring of 2008 as originally planned. Field-testing, though delayed due to integration issues related to the SQL database should have a minimal affect on the final phase of the project

– conducting training sessions, presentations at conferences, and dissemination of results of the project.

NEXT STEPS

During the next six months, the study team will focus on the following:

- Review existing modules and improve them based on suggestions from the partners/advisory committee;
- Add additional instructional modules and functionality as outlined in the proposal;
- Add additional interactive templates and reports as outlined in the proposal;
- Add to each area in the *Commons*;
- Refine and test each area in the *Commons*;
- Develop and refine the *About Us* and *Contact Us* sections of the EDMS; and
- Plan training sessions and EDMS dissemination.

In addition to the continued development and refinement of each area of the EDMS, the study team will conduct field-tests of the EDMS for usability, functionality, and accessibility evaluations for the entire Website (Fall 2007). Usability testing will occur in select libraries. The research team will conduct expert analysis of the Website for the functionality and accessibility evaluations at the Institute.

As suggested by participants of the focus group, the project partners and advisory committee will collect and provide examples of reports, evaluation/report writing tools, and other useful input as applicable for the EDMS. The study team will work more closely with EDMS partners and advisory committee members in the development of support materials for the EDMS. More specifically, the partners and advisory committee members will provide tools and techniques identified in their respective libraries as those used and most useful to libraries for both evaluation purposes and reporting/dissemination purposes. The partners and advisory committee members will participate in field-tests of the EDMS.

APPENDICES

Appendix A: Example Report Generated by State Library Interactive Module



Information Institute, FSU

FY 2006 Internet Survey Data by [MSC] Status ^[3]

Library Selected: *Leon County Public Library (LCPL), Florida*
Metropolitan Status Code: *Urban*
Population of the Legal Service Area: *100,000*
Total Operating Expenditures: *\$1,000,000*

<i>Variable Field</i>	<i>LCPL</i>	<i>Florida</i>	<i>U.S.A.</i>
100 THE AVERAGE NUMBER OF HOURS OPEN PER WEEK			
Total Hours per Week the Library Is Open to the Public	47.5	35.2	29.8
110 THE NUMBER OF PUBLIC ACCESS WORKSTATIONS			
The Average Number of Public Access Internet Workstations	47.5	35.2	29.8
120 THE AVERAGE AGE OF PUBLIC ACCESS WORKSTATIONS			
The percentage of workstations less than 1 year old	10.0%	10.0%	10.0%
The percentage of workstations 1-2 years old	10.0%	10.0%	10.0%
The percentage of workstations 2-3 years old	20.0%	20.0%	10.0%
The percentage of workstations greater than 3 years old	30.5%	33.5%	12.6%
130 PUBLIC ACCESS WIRELESS CONNECTIVITY			
Currently available	70.5%	73.5%	42.6%
Not currently available, but there are plans to make it available within the next year	10.5%	12.5%	11.2%

³ Data presented in this report is based on the Public Library and the Internet Survey 2006. This web-based module (The URL is <http://www.ii.fsu.edu/plinternet/>) is sponsored by the Information Institute of Florida State University and the American Library Association.

.....
Not currently available and there are no plans to make it **18.9%** **14.0%** **16.2%**
available within the next year
.....

Appendix A (Continued)



Information Institute, FSU

FY 2006 Internet Survey Data by [MSC] Status (Continue)

Variable Field	LCPL	Florida	U.S.A.
140 MAXIMUM SPEED OF PUBLIC ACCESS INTERNET SERVICES			
<i>Less than 56 Kbps (kilobits/second)</i>	10.0%	10.0%	10.0%
56 Kbps – 128 Kbps	10.0%	10.0%	10.0%
129 Kbps – 256 Kbps	20.0%	20.0%	10.0%
257 Kbps – 768 Kbps	30.5%	33.5%	12.6%
769 Kbps – 1.5 Mbps (megabits/second)	10.5%	12.5%	11.2%
<i>Greater than 1.5 Mbps</i>	18.9%	14.0%	16.2%
150 PUBLIC ACCESS INTERNET WORKSTATIONS AVAILABILITY			
<i>There are fewer public access Internet workstations than patrons who wish to use them at any given time</i>	70.5%	73.5%	42.6%
<i>Only at certain times during a typical day are there fewer public access Internet workstations than patrons who wish to use them</i>	10.5%	12.5%	11.2%
<i>There are always sufficient public access Internet workstations available for patrons who wish to use them</i>	18.9%	14.0%	16.2%
160 PUBLIC ACCESS INTERNET WORKSTATIONS UPGRADE SCHEDULE AVAILABILITY			
<i>The library plans to add workstations within the next two years</i>	10.0%	10.0%	10.0%
The library is considering adding more workstations within the next two years, but does not know how many at this time	10.0%	10.0%	10.0%
The library has no plans to add workstations within the next two years	20.0%	20.0%	10.0%
170 THE NUMBER OF PUBLIC ACCESS INTERNET WORKSTATIONS TO BE UPGRADED			
The Average Number of Workstations to Be Upgraded	47.5	35.2	29.8

Appendix A (Continued)



Information Institute, FSU

FY 2006 Internet Survey Data by [MSC] Status (Continue)

<i>Variable Field</i>	<i>LCPL</i>	<i>Florida</i>	<i>U.S.A.</i>
200	PUBLIC ACCESS INTERNET-BASED SERVICES AVAILABILITY		
Digital reference/Virtual reference	10.0%	10.0%	10.0%
Licensed databases	10.0%	10.0%	10.0%
E-books	20.0%	20.0%	10.0%
Video conferencing	30.5%	33.5%	12.6%
Online instructional courses/tutorials	10.5%	12.5%	11.2%
Homework Resources	10.0%	10.0%	10.0%
Audio content	20.0%	20.0%	10.0%
Video content	30.5%	33.5%	12.6%
Digitized special collections (e.g., letters, postcards, documents, other)	10.5%	12.5%	11.2%

Appendix A (Continued)



Information Institute, FSU

FY 2006 Internet Survey Data by [MSC] Status (Continue)

<i>Variable Field</i>	<i>LCPL</i>	<i>Florida</i>	<i>U.S.A.</i>
210 PUBLIC ACCESS INTERNET SERVICES COMMUNITY IMPACT			
Provide information for local economic development	10.0%	10.0%	10.0%
Provide information about state and local business opportunities	10.0%	10.0%	10.0%
Provide computer and Internet skills training	20.0%	20.0%	10.0%
Provide real estate-related information	30.5%	33.5%	12.6%
Provide community information	10.5%	12.5%	11.2%
Provide information for local business marketing	10.0%	10.0%	10.0%
Provide services for job seekers	20.0%	20.0%	10.0%
Provide investment information or databases	30.5%	33.5%	12.6%
Provide education resources and databases for K-12 students	10.5%	12.5%	11.2%
Provide education resources and databases for students in higher education	10.0%	10.0%	10.0%
Provide education resources and databases for home schooling	20.0%	20.0%	10.0%
Provide education resources and databases for adult/continuing education students	30.5%	33.5%	12.6%
Provide information for college applicants	10.5%	12.5%	11.2%
Provide access to local public and local government documents	10.0%	10.0%	10.0%
Provide access to federal government documents	20.0%	20.0%	10.0%
Provide access to and assistance with local, state, or federal government electronic services (e.g., driver's license applications, tax filing, other)	30.5%	33.5%	12.6%

Appendix A (Continued)



Information Institute, FSU

FY 2006 Internet Survey Data by [MSC] Status (Continue)

<i>Variable Field</i>	<i>LCPL</i>	<i>Florida</i>	<i>U.S.A.</i>
220 PUBLIC LIBRARY INFORMATION TECHNOLOGY TRAINING AVAILABILITY			
The library does not offer patron information technology training services	10.5%	12.5%	11.2%
Facilitates local economic development	10.5%	12.5%	11.2%
Offers technology training opportunities to those who would otherwise not have any	10.5%	12.5%	11.2%
Helps students with their school assignments and school work	10.5%	12.5%	11.2%
Helps business owners understand and use technology and/or information resources	10.5%	12.5%	11.2%
Provides general technology skills	10.5%	12.5%	11.2%
Provides information literacy skills (i.e., how to access and use Internet-based resources)	10.5%	12.5%	11.2%
Helps users access and use electronic government services and resources (e.g., license applications, tax filing, other)	10.5%	12.5%	11.2%

Appendix B: 2004 NCES and Current NCES Data for [Library name] ^[4]

The Public Libraries Surveys conducted by The National Center for Education Statistics (NCES) provides a national census of public libraries and their public service outlets. Currently the latest report related to the survey for Fiscal Year 2006 is not available yet from the NCES site. You are cordially invited to fill out the data below. An up-to-date NCES Data will help you compare the data in 2004 by each library.

<i>Variable Field</i>	<i>2004 NCES</i>	<i>Enter Current NCES Data</i>
<i>PAID STAFF (FULL-TIME EQUIVALENT)</i>		
300 <i>The Number of Paid ALA-MLS Librarians</i>	1,500	<input type="text" value="Enter data"/>
310 <i>The Number of Paid Non ALA-MLS Librarians</i>	1,500	<input type="text" value="Enter data"/>
320 The Number of Paid Total Librarians	3,000	<input type="text" value="Enter data"/>
<i>OPERATING EXPENDITURES</i>		
400 <i>Total Staff Expenditures (\$)</i>	41,500	<input type="text" value="Enter data"/>
410 <i>Total Collection Expenditures (\$)</i>	21,500	<input type="text" value="Enter data"/>
420 <i>Other Operating Expenditures (\$)</i>	63,000	<input type="text" value="Enter data"/>
430 <i>Total Operating Expenditures (\$)</i>	126,000	<input type="text" value="Enter data"/>

⁴ Data presented in this report is based on the website of the National Center for Educational Statistics (NCES). The URL is <http://nces.ed.gov/index.asp>.

Appendix B (Continued)

<i>Variable Field</i>	<i>2004 NCES</i>	<i>Enter Current NCES Data</i>
<i>LIBRARY COLLECTION</i>		
500 <i>The Number of Print Materials Acquired</i>	41,500	<input type="text" value="Enter data"/>
510 <i>The Number of Electronic Books (E-Books) Acquired</i>	21,500	<input type="text" value="Enter data"/>
520 <i>The Number of Audio Materials Acquired</i>	63,000	<input type="text" value="Enter data"/>
530 <i>The Number of Video Materials Acquired</i>	126,000	<input type="text" value="Enter data"/>
<i>LIBRARY SERVICES TRANSACTIONS</i>		
600 <i>The Total Annual Circulation</i>	41,500	<input type="text" value="Enter data"/>
610 <i>The Total Number of Library Visits</i>	21,500	<input type="text" value="Enter data"/>
<i>ENTER YEAR OF DATA</i>		<input type="text" value="Enter Year"/>

Submit Current NCES Data

Appendix C: Example with Current 2007 Data (fictitious, demonstration only) Entered



Information Institute, FSU

Current NCES Data for [Library name] ^[5]

Library Selected: *Leon County Public Library, Florida*

Metropolitan Status Code: *Urban*

Population of the Legal Service Area: *100,000*

Total Operating Expenditures: *\$1,000,000*

<i>Variable Field</i>		<i>2004 NCES</i>	<i>2007 NCES</i>
<i>PAID STAFF (FULL-TIME EQUIVALENT)</i>			
<i>300</i>	<i>The Number of Paid ALA-MLS Librarians</i>	<i>1,500</i>	<i>1560</i>
<i>310</i>	<i>The Number of Paid Non ALA-MLS Librarians</i>	<i>1,500</i>	<i>1560</i>
<i>320</i>	<i>The Number of Paid Total Librarians</i>	<i>3,000</i>	<i>3120</i>
<i>OPERATING EXPENDITURES</i>			
<i>400</i>	<i>Total Staff Expenditures (\$)</i>	<i>41,500</i>	<i>41,000</i>
<i>410</i>	<i>Total Collection Expenditures (\$)</i>	<i>21,500</i>	<i>21,500</i>
<i>420</i>	<i>Other Operating Expenditures (\$)</i>	<i>63,000</i>	<i>63,000</i>
<i>430</i>	<i>Total Operating Expenditures (\$)</i>	<i>126,000</i>	<i>125,500</i>
<i>LIBRARY COLLECTION</i>			
<i>500</i>	<i>The Number of Print Materials Acquired</i>	<i>41,500</i>	<i>40,500</i>
<i>510</i>	<i>The Number of Electronic Books (E-Books) Acquired</i>	<i>21,500</i>	<i>20,500</i>
<i>520</i>	<i>The Number of Audio Materials Acquired</i>	<i>63,000</i>	<i>60,550</i>
<i>530</i>	<i>The Number of Video Materials Acquired</i>	<i>126,000</i>	<i>121,550</i>

⁵ Data presented in this report is based on the website of the National Center for Educational Statistics (NCES). The URL is <http://nces.ed.gov/index.asp>.

<i>LIBRARY SERVICES TRANSACTIONS</i>			
<i>600</i>	<i>The Total Annual Circulation</i>	<i>41,500</i>	<i>51,500</i>
<i>610</i>	<i>The Total Number of Library Visits</i>	<i>21,500</i>	<i>25,125</i>

Appendix D: Local Conditions Page

Local Conditions

In order to better customize the reports that the EDMS generates for your library, it would be very helpful if you would answer the questions below. Your responses to these questions will be incorporated as part of your library's profile so that specific aspects of the reports generated will take into consideration the local conditions at your library. Once the questions have been completed, they do not have to be completed again. If you prefer not to answer the questions to better customize your reports, just skip to the next page.

Step 1: Fill in One Only for Each Local Condition

1.

Please describe the nature of your Board of Trustees:

- Governing Body
- Advisory Body
- Other

2.

The Director of the library (system) reports to:

- Mayor
- City Manager
- County Supervisor
- Other

3.

Information Technology is managed by:

- The Director
- An Assistant/Associate Director
- A full time professional librarian
- A part-time person
- No one

4.

The degree to which the Library is Politically active with the community is:

- Very much
- Somewhat
- Not much at all

5.

How would your community of users grade the quality of services the library provides:

- Excellent

- OK
- Poor
- Don't Know

6.

The physical facility of the library (system) can best be described as:

- in need of major renovation
- in need of some renovation
- in need of a new up-to-date building
- in good shape

7.

The Friends of the Library are:

- very active and raise a lot of money
- somewhat active and raise some money
- not very active and raise little money
- not in existence or are inactive

Step 2: Submit Local Conditions

[Update Local Conditions](#)

[Return to Account](#)

Appendix E: Advisory Committee/Project Partner Focus Group Results

The research team presented an overview (EDMS handout, see Figure 1 of the report) of the EDMS to begin the focus group session. Participants of the focus group included members of the Advisory Committee and Project Partners attending the ALA conference in Washington, D.C. on June 24, 2007. Basic components of the EDMS include:

- Instructional Modules (static);
- Interactive Modules (customized for individual libraries) that include:
 - Profile Generator (generates a statistical profile of the participating library which would be used in conjunction with the Interactive Modules),
 - Local Conditions (identify local library specific situational factors), and
 - State Library Statistical Module; and
- Information Commons that includes:
 - phpBB – threaded discussion list using phpBB Open Source discussion forum software;
 - Ask an Expert – downloadable PDF form template; and
 - Supplemental resources/references for each of the instructional modules.

Members of the study team noted that the amount of time and expense to create the EDMS website has been significant; and the technical level of effort to produce the modules, especially the interactive modules have been much more than expected.

Overall, the attending members were very positive about the beta version and complemented a number of the components and content. They also provided a number of suggestions, additions, changes, and edits for the research team to improve the EDMS.

Discussion Points

Presentation of EDMS

Discussion of the quality of 2004 NCES Data and 2006 Internet Survey Data that included why the study team chose these datasets for use in the module and excluded other data sets. The study team noted these data sets were readily available and were sufficient for a beta version test. Researchers could add additional datasets in future iterations of the EDMS. In addition, the research team noted the addition of an interactive module where participants of the EDMS could update 2004 NCES data by entering 2007 data into the correct fields.

Instructional Modules

The study team presented the instructional modules and explained the template format. There was one issue/concern as to how many users could login to the system at any given time. The study team did not anticipate this as a problem, but would explore this potential issue during the refinement process before the field-testing begins.

Interactive Modules

The group discussed how to best proceed with the continued development of the interactive modules. The *State Library Statistical Module* is the only *Report Generation Module* completely developed and tested on the beta version; however, the cost of its development was significant. Another similar type module on *Budget Preparation* was attempted; however, excessive situational factors related to any one library made technical development not feasible. The research team has decided to drop the original idea of developing interactive, situational specific reports. The new focus is on developing modules that inform/teach libraries how to develop/generate unique evaluation reports based on the local library's specific situational factors. Creation of an actual report from databases is simply not feasible at this time given the number of potential factors, limited resources, and technical constraints.

The advisory committee and partners recommended that researchers modify the *Report Generation Modules* to provide planning assistance and guidance in the development of evaluation activities useful to a particular library. The development of specific unique evaluation reports for a library, e.g. an outcomes assessment of a particular library program is too technically complicated to do at this time.

Local Conditions

As presented, the lists of questions need to better separate libraries (by factors). Interest by participants in local conditions focused on availability of more demographic information for comparison of library statistics with other similar libraries. The participants suggested changes to the current set of sample questions (budget related), such as:

- Question 2 – needs to have “Report to a Board” added;
- Question 3 – needs Technology/Chief Information Officer added to the choices to cover other areas in a library, such as individuals who manage all library technology, hold a professional position, but are not librarians;
- Question 6 – need to add the choice of N/A for when it is not applicable. N/A could possibly be added to other questions as well; and
- Question 7 – add the ability to check more than one option when possible, such as for libraries with more than one “Friends of Library” groups.

A *Program Assessment* module or something similar could provide assistance and planning tips for how a particular library program could be evaluated, e.g., digital reference. The module could draw upon information provided from *Local Conditions* and the *Profile Generator* to assist customization of the module and its output to a particular library.

Commons

Participants provided positive responses on the use of threaded discussions for dialogue/messages; however, there was concern over who would use the discussion list other than the advisory committee/partner members. Another issue with the discussion list concerned the login. At present, login for the phpBB requires creation of a separate user account (separate from the EDMS login account). The research team noted this as a known issue still under

development. The login will eventually be the same for both the interactive modules (necessary to save copies of reports/templates/etc. for future editing through the site) and the phpBB discussion software.

Other points from participants for the *Commons* area include adding a note to the discussion area about estimated response time since the discussion section is asynchronous. In addition, for the *Ask an Expert* template participants suggested adding the experts name in the drop-down box of the template and not just include the type of evaluation relative to the expert.

General Comments

Participants agreed with the study team that development of a new approach for the *Instructional Modules* would provide results that are more useful where the emphasis focuses on how to generate and disseminate reports rather than trying to produce useful reports strictly from variables contained in databases. They agreed there simply are too many situational factors that would affect the nature of reports generated from these modules. Participants suggested that partner libraries could provide examples of tools, sample reports, and techniques their libraries have used that would serve as examples.

As a re-evaluation of the project, the Advisory Committee and Project Partner members (present) proposed a number of suggestions to improve the project. Suggestions include:

- Re-assess and identify the target audience for the project;
- Track peer performance and compare with similar populations, service areas, budget categories, MLAs, etc.
- Eliminate the login box from the *Home* page of the EDMS. The participants suggested that many potential users would not explore the site if they believe they have to create a login to do so;
- Plan more demonstrations of the project around the country, in addition to the planned training sessions and conference presentations;
- Take advantage of social networking available through the members of the Advisory Committee and Project Partners; and
- Prepare example presentations with visuals from actual reports as part of the report generation process.

In addition, the participants suggested less focus on using more variables and more focus on how to integrate data and include local circumstances to tell a library's evaluation story.

Participants agree that locally collected library usage data (or other data) could show impacts/benefits; however, libraries need to know how to best use the data and present findings. Participants noted that library usage data (or other data) can help libraries determine:

- What story they are trying to tell and how to tell the story;
- How to give that story a context; and
- How the story can show how libraries make a difference in the community.

Ultimately, the EDMS does not replace thinking; it helps organize thoughts to tell a story.

Appendix F: Web Analysis for EDMS Beta Site Results

The following evaluation contains issues and considerations intended to aide the study team improve the current EDMS site. Refinement of the site is currently underway based on the results of this evaluation.

Login Boxes

1. Several sections do not require login information in order to access their contents. Placement of the mandatory login box on the Home page of the site and on other pages not requiring login will cause a loss of many potential participants of the site and their interest in using the site. Please remove the login boxes from the following sections: Home page, About Us, Contact Us, and Commons (except for the phpBB).
2. Centralize the login information for both Interactive Modules and phpBB so that users are not required to register with different authentication information when using phpBB.
3. If you put in the wrong password, it says "Account not found. Please try again." We prefer a login that tells you where you made a mistake...either the account or the password. Can they add that feature? Can it send me my password if the person forgets it?

Breadcrumbs

Add Breadcrumbs for the tabs (main navigational menu) to better direct users who have difficulty keeping track of paths visited.

Instructional Modules

Several tasks need to be accomplished in this section:

1. Add an overview for the Instructional Modules home page
2. Insert a brief introduction for each module under the Instructional Modules home page
3. Include the Developer Information at the first page of each presentation (except for the Service Quality page) based on the template below (see Figure 1):

Figure 1

Name of Presentation
Name of Author
Title
Email address
Date of Creation

4. Update the layout of the Instructional Modules home page using the following template (see Figure 2)
5. Implement the content of the remaining modules which are in black font color (see Figure 2)

Figure 2

Introduction to Evaluation

- [Importance of Evaluation I](#)
- [Importance of Evaluation II](#)
- Library Situational Factors
- Evaluation and Data Needs

Evaluation Approaches

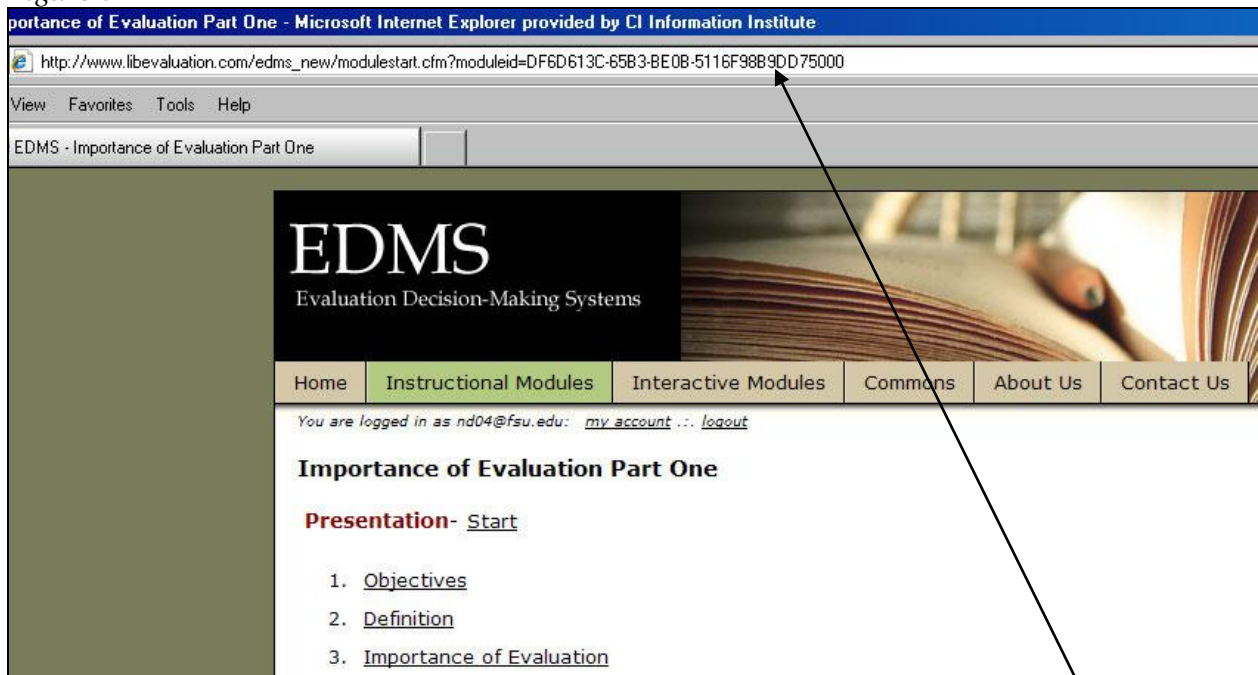
- Service Quality
- [Outcomes Assessment I](#)
- [Outcomes Assessment II](#)
- Value
- E-Metrics
- Outputs
- Survey
- [Balanced Scorecard](#)

Evaluation Support Modules

- [Data Collection I](#)
- [Data Collection II](#)
- [Data Analysis I](#)
- [Data Analysis II](#)
- Excel for Data Collection
- Access for Data Collection
- Focus Groups
- Surveys
- Codebooks
- Log Analysis

6. The address for each module is dynamically assigned and hence it is not meaningful for retrieving and linking purposes (see Figure 3). Rename the address of each module and update the internal links between modules with the newly modified address. This links are always located at the end of each module (see Figure 4)

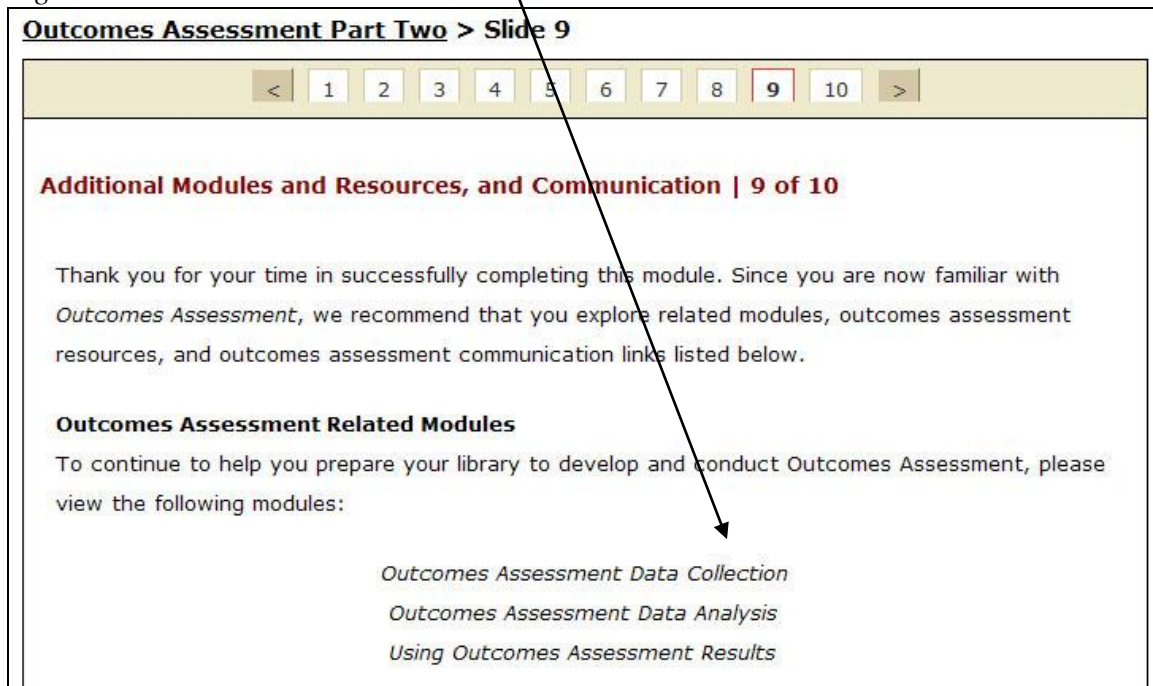
Figure 3



Update the internal links of each module

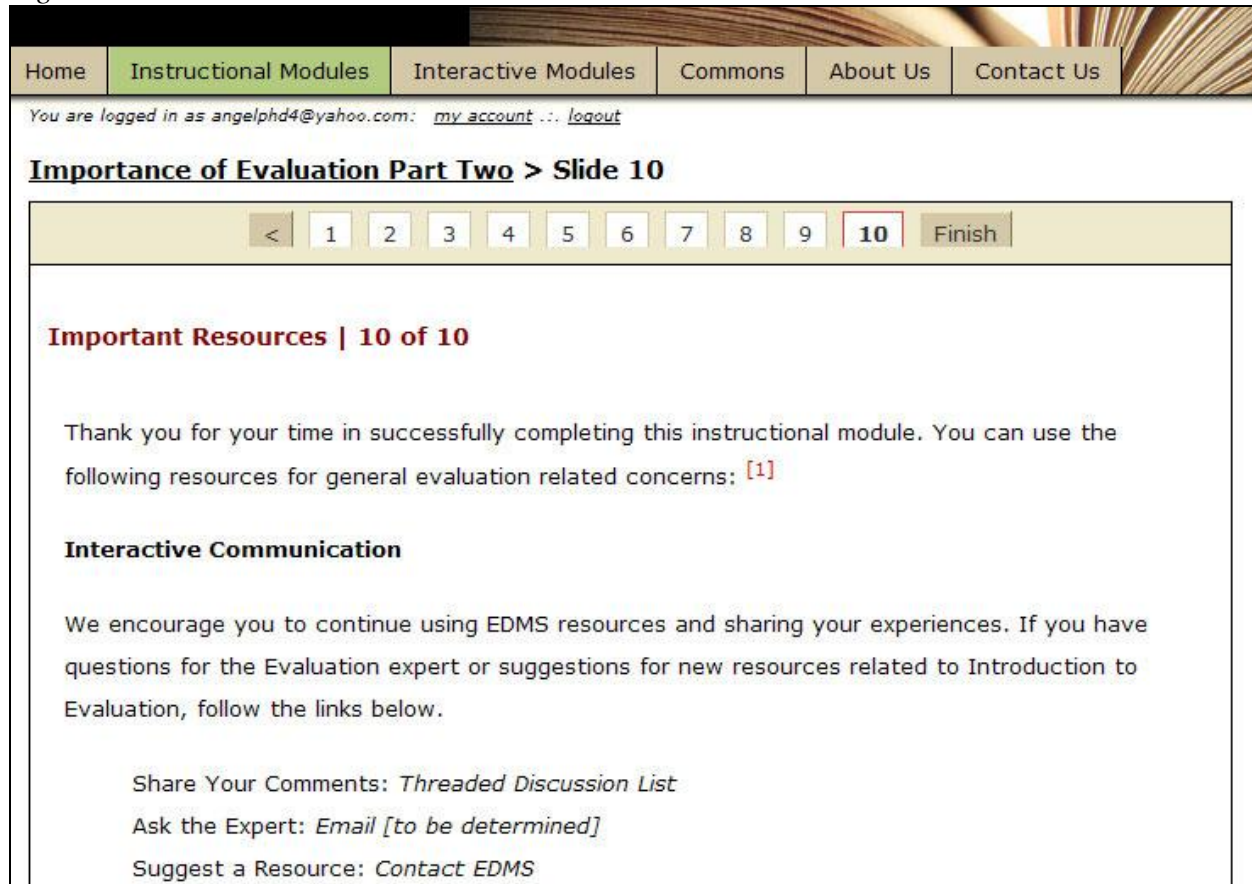
Rename the address of each module

Figure 4



7. Update the links for the *Ask the Expert* and *Suggest a Resource* at the end of each module (See Figure 5)

Figure 5



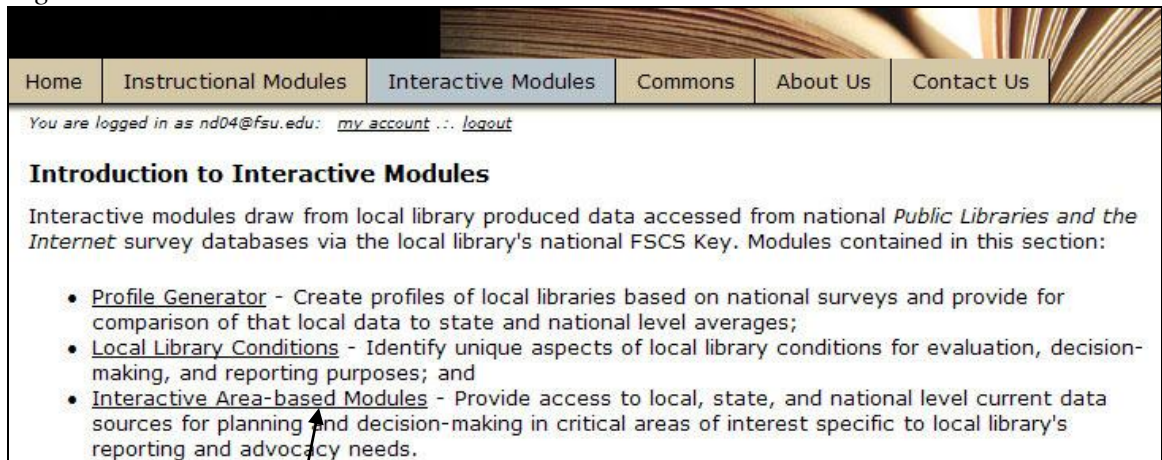
8. When you finish a module, it goes to a “Presentation Finished” screen with only one option “Return to Introduction to Evaluation.” It would be great if it skipped that screen and then just went back to the menu.
9. In later modules, there is an option for “Take the Module Review Session.” That option is not working. Again, it should just start the review session instead of having the option to go back to the main menu. More people would do the review session, if they had to at least click through it.
10. Clicking – It would be better to use commands on the keyboard to the mouse. It would be great to hit the space bar or enter and have the modules move through the slides, instead of clicking every time.

Interactive Modules

1. Interactive Modules Home Page

- a. The Link to Interactive Area-Based Modules in this page is not working and therefore needs to be updated (see Figure 6)

Figure 6



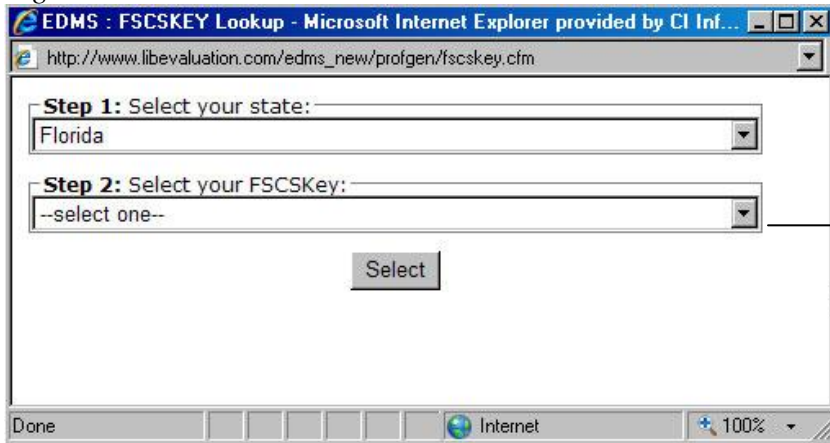
The link is not working.

2. Profile Generator

a. Find my FSCS Key

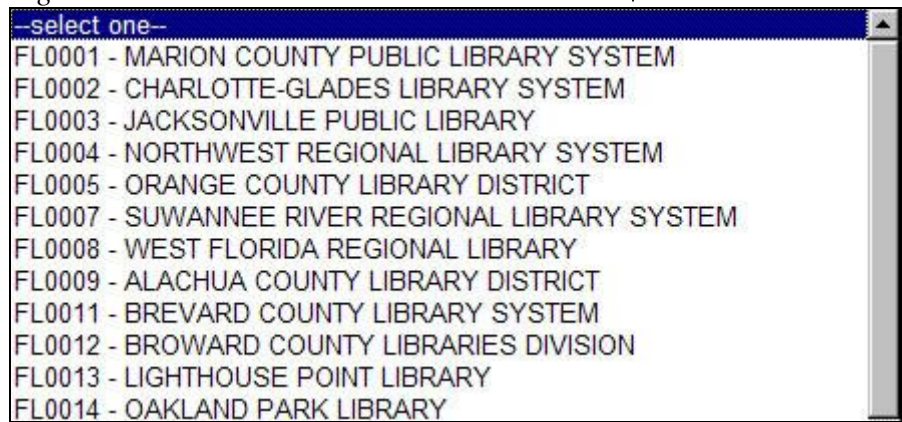
The List Box of the Step 2 lacks the functionality of keeping track of libraries by their names if the library FSCS Keys are unknown. Can the list of libraries be arranged by alphabetical order by name, rather than by FSCS Key (see Figure 7 & 8)?

Figure 7



Lack of functionality to sort the libraries

Figure 8



- b. Adding a search by county would save users time because they would not have to scroll through all the libraries for each state, is this possible?
- c. Upload 2006 Internet Survey Data and Current NCES Data using pre-defined template (see Appendices A, B, C)
 - Appendix A – a sample of final report for the 2006 Internet Survey Data
 - Appendix B – a sample of the Current NCES Data Template
 - Appendix C – a sample of final report for the Current NCES Data
- d. Upload 2005 NCES Data and 2007 Internet Survey Data once they become available.

e. Your EDMS Account

Edit link of *view final report (word)* is not working properly. Once the content of the WORD document is updated and saved, the final updated version is the *View final report (PDF)*, rather than *view final report (word)* (see Figure 9 - A).

f. Different file format availability may cause confusion

If users choose different FSCS keys, the content for Word and PDF files target at different libraries. Library names should be added if files reference different FSCS keys (see Figure 9 - B).

Figure 9

Your EDMS Account

Thank you for returning to the EDMS. You can view your account preferences below, including your most current report from the State Library Statistical Module. You can return to this page at any time by clicking on the "my account" link at the top of the page next to your login name.

Modules

Your report has been updated.

module	creation date		
Profile Generator	6/29/2007	View 2004 NCES Data (Word) View 2004 NCES Data (PDF)	Create Create
Local Conditions	6/29/2007	View answers	
State Library Statistical Module	6/29/2007	View final report (PDF) View final report (Word)	Create Edit Create Edit

Different file format availability may caused confusion

The edit link only updates PDF file rather than WORD file

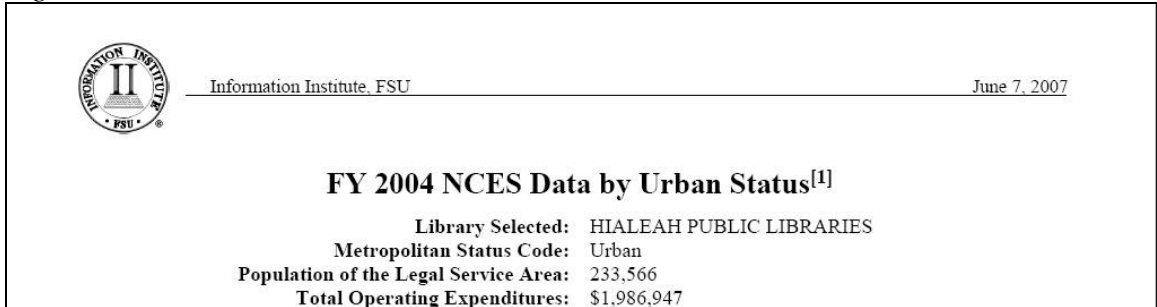
g. Margins

The left and right Margins on the reports in Word and PDF formats are too narrow (less than 0.5 inches) to be printed correctly in some circumstances.

h. Dates on the report

The date (June 7, 2007) on the PDF report does not reflect the actual day (June 29, 2007) that the report was created (see Figure 10).

Figure 10

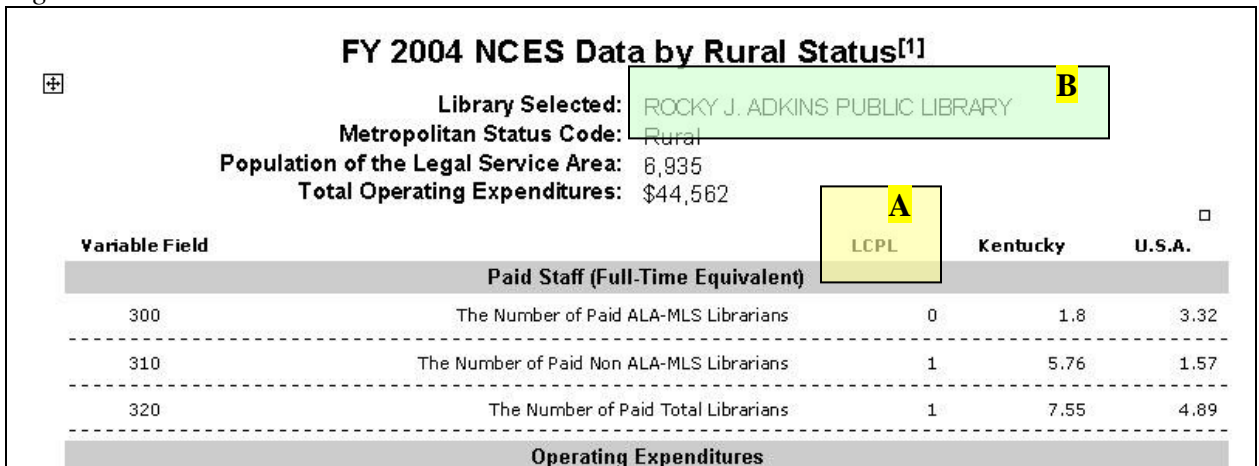


i. LCPL should not be used as the label of each library.

LCPL is the acronym representing the Leon County Pubic Library.

Replace LCPL with the actual acronym for each selected library– composed of the first character of each word, such as RJAPL for ROCKY J ADKINS PUBLIC LIBRARY (see Figure 11 - A). Add the acronym to the end of the name of the library (see Figure 11 - B).

Figure 11



Commons Areas

1. Ask an expert

Insert a space between *budgets* and *will*

Ask an Expert

Select an area of expertise below to send your question to an expert in this area:

Step 1: Select the subject area for your question: _____

Library Budgets

Your expert for Library Budgetswill be John Bertot

↑

Insert a space
between *Budgets*

2. Module Resources Commons

Update the internal links of modules in this page