

# *Information Use Management and Policy Institute*

## **CREATING A FIVE YEAR STRATEGIC PLAN FOR LIBRARY DEVELOPMENT IN THE STATE OF FLORIDA:**

### **SUMMARY OF NEEDS ASSESSMENT**

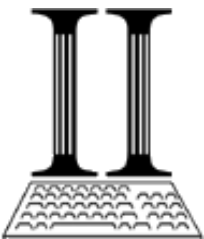
by

**Joe Ryan** <jryan@mailbox.syr.edu>  
Senior Research Associate

**Charles R. McClure** <cmclure@lis.fsu.edu>  
Francis Eppes Professor and Director

**John Carlo Bertot** <jcbertot@lis.fsu.edu>  
Associate Professor and Associate Director

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Information Use Management and Policy Institute <http://www.ii.fsu.edu/>  
School of Information Studies  
Florida State University  
Louis Shores Building, Room 226  
Tallahassee, Florida 32306-2100  
(850) 644-8109 phone  
(850) 644-9763 fax

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## CHAPTER 1: INTRODUCTION

A strategic plan for library development is a vision of the future with a roadmap for how to reach that vision. It brings together a wide range of participants and stakeholder groups to work together to reach that vision. The plan also provides a basis for making difficult funding decisions on what library services, collections, and programs are *most important* and have *greatest priority*. Finally, a strategic plan identifies and leverages the strengths of libraries and external partners such that the whole is more than the sum of its parts. As libraries grapple with myriad choices and opportunities for providing services, setting priorities, providing leveraged and innovative services to its users, and maintaining a high quality staff, a strategic plan is essential.

Given this context, the Information Use, Management and Policy Institute, School of Information Studies, Florida State University was asked by the Florida Department of State, Division of Library and Information Services to advise them on the preparation of a *Strategic Plan for Library Development in Florida*. The Institute study team consisted of Charles R. McClure, Director; John Carlo Bertot, Associate Director; and Joe Ryan, Senior Research Associate. Complete project information, including background information, can be found at [http://dlis.dos.state.fl.us/bld/Lrp/lrp\\_main.htm](http://dlis.dos.state.fl.us/bld/Lrp/lrp_main.htm) and will not be repeated here.

### Study Approach

After considerable discussion with the Division of Library and Information Service staff it was determined that the consultant's efforts should be directed toward doing a needs assessment that would serve as the basis for future strategic planning documents. Two broad research questions were identified:

- Describe key priorities<sup>1</sup> to be addressed by your library over the next five years that may be priorities for other Florida libraries or statewide?
- Given those priorities, what activities<sup>2</sup> could an external partner<sup>3</sup> in cooperation with your library sponsor to achieve these priorities?

The researchers relied on multiple qualitative and quantitative data collection techniques and iterative learning strategy based upon proven research approaches and strategies that ensure valid and reliable data (e.g., Rossi and Freeman, 1993; Krueger, 1994; Creswell, 1994).

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<sup>1</sup> Priorities were defined during the meetings as plans, dreams, needs, issues, opportunities, external partner plans, etc.

<sup>2</sup> Activities were defined during the meeting as encompassing actions, programs, services, funding, etc.

<sup>3</sup> External partners were defined during the meeting as being organizations that have to potential to work with and assist libraries but to include more than the Division. One intent of the plan was to identify priorities and activities of interest to a number of external supporters of libraries of all types.

## Data Collection

Data collection occurred during the period February 1 to May 1, 2002. The study team employed a number of qualitative and quantitative data collection approaches and instruments to address the research questions. Data collection methodologies included:

- **Environmental scan:** The study team examined documents from a variety of sources including the Division, study participants, other state library activities, and its own literature review.
- **Consultation with Division staff:** The Senior Research Associate held three sets of interviews at the beginning, middle and end of the data collection phase with state library managers including: the State Librarian, the Assistant State Librarian, Bureau of Library Development staff, and management staff of the Bureau of Archives and Records Management and the Bureau of Library and Network Services.
- **Six regional meetings:** The Senior Research Associate held regional meetings at Tampa, Orlando, Del Ray Beach, Miami, Tallahassee, and at FLA in Daytona Beach. 146 key stakeholders were interviewed including: public library managers; Multitype Library Cooperative directors; library friends, statewide single type network, FIRN, administrators; academic, school, special library leaders; key advisory councils and governing boards and local government officials. Participants at each session were asked to complete brief written surveys. See Chapter 2 for further details and findings.
- **Web based survey:** The study team conducted a web-based survey <<http://dlis.dos.state.fl.us/survey/>> from April 15 to April 30 with 200 respondents. See Chapter 3 for further details and findings.

The researchers used an iterative learning strategy to sequence individual data collection events and their analysis such that findings from one activity were tested in subsequent data collection and analysis events. The study team shared periodic summaries of study findings and analysis with study participants to cross-check factual accuracy, completeness, agreement on interpretation and to elicit further comment. This iterative learning approach allowed the researchers to modify, adapt, and refine their data collection and analysis activities as the study team learned.

## Data Quality

The study team made a systematic effort to reduce error due to researcher bias, incomplete or inaccurate data, and a host of other causes. In this effort, the researchers used standard techniques to reduce the threats to data quality as suggested by Creswell, (1994), Guba & Lincoln (1981), Miles & Huberman (1994), and Patton (1990) including:

- Pre-structured research questions and interview instruments, pre-planned fieldwork, and where possible pre-planned final report. Interview instruments were distributed to those interviewed in advance.
- Chose standard, well-regarded methods familiar to the evaluators and appropriate to the setting. Primary methods were qualitative (Miles & Huberman, 1994) including the use

of documentary evidence, interviews (Spadley, 1979), focus groups (Kruger, 1994 and Morgan, 1988) and preparation of case studies (Stake, 1994 and Yin, 1994).

- Documented fully research design decisions in writing and in discussions among the study team.
- Sought dis-confirming and outsider evidence and points of view actively. Attempted, within the constraints of the visit, to interview stakeholders from multiple-perspectives.
- Responded flexibly to the new and unexpected opportunities the data offered.
- Documented fully the data collected. Where possible, the onsite evaluators tape recorded interviews while maintaining confidentiality. Evaluators conducted follow-up interviews where necessary.
- Triangulated the data collected and used mixed methods. Data collected from one source was cross-checked with another. The evaluators compared data collected using one method with answers obtained via another method. The evaluators shared drafts of factual portions of the final report with a key liaison at each site to check for accuracy.
- Pre-structured data analysis and reporting as suggested by Miles and Huberman (1994). This approach was possible because most of the data collection was pre-structured and the intended shape of the final report was known.
- Checked the quality of the data by tracking the chain of evidence that the study team gathered to be sure it was firm enough to support statements made.

Each of these efforts and others increased the validity and reliability of the evaluation findings and provided a firm basis for making recommendations.

**CHAPTER 2: REGIONAL MEETING SUMMARY**

The Senior Research Associate on the study team conducted a set of six regional meetings at Tampa, Orlando, Del Ray Beach, Miami, Tallahassee and at the Florida Library Association (FLA) annual meeting in Daytona Beach. 146 library managers and library supporters were interviewed.

Table 2-1 indicates the overall composition of those interviewed. The majority of those interviewed were public library managers. But there were also: managers from each of the regional cooperatives, managers of community college, university school and special libraries, the Deans of the two M.L.S. degree granting universities and coordinator of one of the library technician Associate degree granting programs, state government managers with responsibilities for libraries, governing and advisory board members, Friends of the Library and several library school students.

**Table 2-1. Overall Composition of those Interviewed at Regional & FLA Meetings.**

Category	Number
Public Library Managers	77
Cooperative Managers & Staff	11
Academic Library Managers <sup>4</sup>	18
School Library Managers	9
Special Library Managers	3
Library School Managers <sup>5</sup>	5
State Agency	1
Advisory Group Members <sup>6</sup>	5
Library Friends & Advisors	17

The Senior Research Associate asked the meeting participants two basic questions:

- Describe key priorities<sup>7</sup> to be addressed by your library over the next five years that may be priorities for other Florida libraries or statewide?
- Given those priorities, what activities<sup>8</sup> could an external partner<sup>9</sup> in cooperation with your library sponsor to achieve these priorities?

Appendix 2-1 includes instrument distributed at the meetings. Summaries of the meetings were prepared and meeting participants were given an opportunity to review the summaries for accuracy and as a way to elicit new ideas (and many did comment).

<sup>4</sup> Includes state and private University, college, and community college library managers.

<sup>5</sup> Includes Deans and faculty at M.L.S. and Associate degree granting institutions.

<sup>6</sup> Includes LSTA Council and State Library Council members self identified. Other participants serv in advisory capacity to the Division but did not identify themselves as such.

<sup>7</sup> Priorities were defined during the meetings as plans, dreams, needs, issues, opportunities, external partner plans, etc.

<sup>8</sup> Activities were defined during the meeting as encompassing actions, programs, services, funding, etc.

<sup>9</sup> External partner was defined during the meeting organizations with and interest in and willing to work with the broader library community. One intent of the plan was to identify priorities and activities of interest to a number of external supporters of libraries of all types.

The issues and findings presented here represent the views of the *participants* regarding library development in Florida. These views may not be representative of the larger population. The study team believes, however, that the findings presented in this report present an accurate sense of the library community and supporters' views of library development priorities and activities over the next several years. The final chapter of this report offers some brief views of the study team.

The next pages summarize what we heard from the library community and supporters as to library development priorities and activities external partners<sup>10</sup> should engage in over the next several years.

## Findings from the Regional Meetings & FLA

### Statewide Virtual Library

At all of the regional meetings so far, there was widespread support and anticipation for a statewide, multi-type virtual library that would have the following features:

- **Statewide library card and patron database:** that would serve as the authentication vehicle for use of other virtual library services. It would “give permission to a library user to check out material at any library [under their rules] and return it to any library.”
- **Shared (union) catalog:** to eventually include all Florida’s libraries with a patron initiated interlibrary loan (with some form of extended circulation<sup>11</sup>) feature. How this is to be accomplished, cataloging standards, the role of OCLC, and outsourcing of various cataloging functions via statewide contract or other means may need review at the same time this service is introduced;
- **Shared content:** including licensed databases, state government information, a union list of serials, foreign language and video materials, literacy and test preparation materials (GED, SAT, FCAT, Armed Forces, etc.), perhaps educational games, library staff and public instructional modules, and other online content;
- **Online multilingual instructional assistance:** Introducing the virtual library concept and purpose and for completing frequently requested tasks (e.g., obtaining a library card), using databases and services, for other related purposes;
- **Statewide multi-type reciprocal borrowing agreements:** allowing citizens to use (including check out and return materials) libraries outside their community to meet their information needs. Some thought this is likely to be a stumbling block to participation by some libraries until they see that “99% of their users won’t ever use this service and the other 1% that use the service will talk it up to all the right people.”
- **Statewide multi-type document delivery:** so that all types of materials (not just those that are paper-based) requested from a remote library could be delivered locally and returned promptly. User may have option to pay for speedier option if desired.

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<sup>10</sup> External partner are defined to include more than the Division.

<sup>11</sup> This software feature aids libraries when processing interlibrary loans including checking the item out, checking the item into the borrowing library, creating temp records, managing borrower circulation, etc. within the library’s integrated automation system.



- **Statewide multi-type reference service:** eventually offered on a 24x7x365 basis.
- **Evaluative data:** There were two hopes here. There would be a mechanism devised to identify an individual library service population's use of the statewide virtual population (including what patrons are borrowing via the extended circulation feature). Second, the Division would use its clout with vendors to obtain data that all libraries needed in a useable form.

Most believed the statewide virtual library will move Florida libraries closer toward achieving what citizen/taxpayer/library users want: one, easy to use, interface that provides answers and text (not just citations), or if necessary a ready means of obtaining the answers from local or remote collections, without having to look in a dozen different locations navigating many different services each with their own peculiar search strategies, wherever and whenever they need it. One participant summarized, "We are talking about improving Florida's intellectual infrastructure here. It is every bit as important as building needed roads and adding train service."

### *Virtual Library -- Issues Mentioned*

#### *Can the Division and Others Deliver*

Participants at every group interview at every regional meeting expressed a range of concerns with the same theme: can the Division, or any external partner, gain the political and financial support needed from the various stakeholders to make a statewide virtual library a reality? One retired library board member summarized repeated comments, "I can show you when they asked us to plan for a statewide library card thirty years ago – we still don't have one. I can show you when we all agreed to the idea of purchasing statewide licensed databases ten years ago – all we got was FirstSearch. Haven't we done enough planning, isn't it time for delivering?" There is additional concern because a similar effort was tried before with libraries of all types. But public libraries had to drop out due to lack of funding while community college, university and school libraries licensed database program continued. A regional meeting participant suggested the study team read the 1989 report of the Florida Senate Committee on Government Operations.<sup>12</sup> The study participant suggested the report provides instructive reading outlining one possible, but unfortunate (in his/her view) future if repeated. Others thought the report provided a useful beginning point to better coordinate statewide library services.

Specific concerns mentioned at the regional meetings include:

- Will the Division and its partners make the tough decisions needed to make the various aspects of the virtual library a reality? Some are likely to be unpopular, mistakes will be made. Yet to succeed, someone must act.
- Will the state fund the various aspects of the project after LSTA funding end? What will happen if the state doesn't fund the various aspects of the virtual library initiative?

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<sup>12</sup> Florida. Senate Committee on Government Operations. (1989, April). *A review of the benefits, costs, and feasibility of a statewide network linking the libraries in Florida*. Tallahassee, FL: Senate.

- What will be the affect on state aid? Will local funders think that the statewide virtual library is all the library their communities need? Will this increase in state funding be matched by a decrease in local support? What ways can be found to ensure local funding remains constant or increases?

Two suggested alternative approaches to Division implementation of the statewide virtual library include:

- **The Ohio approach:** Hire a small group of outside professionals, fund them adequately, give them clear targets and objectives, and let them bear the heat.
- **Entrepreneurial cooperative approach:** Outsource all or part of the virtual library package to one or more entrepreneurial multi-type cooperatives for statewide provision of service.

It was clear that the librarians interviewed were tired of waiting. The emphasis needs to be placed on delivering a long overdue service to the taxpayer rather than to any one library, system, cooperative or type of library.

#### *Impact on Local Library, Staff & Users*

Participants, some of whom are managers under partial, regional, versions of the statewide virtual library, identified several issues that need attention:

- **Ease of use saves costs at the local library level:** There is a direct relationship between amount and diversity of content, ease of use of the interface, system complexity and frequency of system update on the one hand with local library costs of staff and user training and alteration of workflow on the other. For example, if there is a large and diverse amount of digital content with a cumbersome, hard to use interface, then staff will need training, workflow will need adjustment, users will need to be trained and their will be less use. A difficult to use or complex virtual library will push the recurring costs of staff and user training down to the local library level. Frequently updated systems, often without warning (but even with warning), further compound the staff and user training problems. The degree of complexity and ease of use can be adjusted to some degree by user tested online training modules, a systematic plan for staff training both to introduce as well as sustain the system.
- **Uneven or incomplete introduction of services:** Attention should be given to introducing one feature of the statewide virtual library without others. For example, introducing a shared catalog without reciprocal borrowing or an effective means for a user to obtain the materials identified by the catalog. Will local libraries with cataloging adequate for the local library users find that their cataloging is inadequate in a shared catalog environment? Or is this not an issue? Library managers, particularly at small libraries, need pragmatic guidance and/or additional resources to address this issue.
- **Workflow and staff roles will change:** Libraries that have similar systems report change in staff responsibilities and roles as the result of virtual library introduction. Staff will need to be prepared and excited about such changes.

Someone on the statewide virtual library decision making team will need to be sensitive to the local library, staff and user consequences of selecting a difficult to use interface and complex or even a large number of resources.

Library managers were concerned that planners for the virtual library assess in advance:

- The type and amount of *staff* training that will be needed and develop a plan for delivering the training prior to when the virtual library is introduced. The ongoing need for staff training (due to staff turnover) should be addressed at the same time.
- The type and amount of *user* training that will be needed and develop a plan for delivering the training prior to when the virtual library is introduced. Consideration should be given to the diversity of library users in preparing instructional materials. The ongoing need for *user* training should be addressed at the same time.
- The changes in workflow likely to occur as the result of the introduction of the virtual library and their likely consequence for libraries of all types and sizes.
- The tradeoffs between available interfaces and content and staff and user training and workflow.

Communicating the findings of these assessments to library managers prior to implementation is as important as the findings themselves. Much can be learned from careful study of the implementation of similar systems in Florida and in other states. Still more can be learned from pre-testing any proposed statewide virtual library with real users and staff and committing the time and resources to addressing areas of concern that result.

#### *External Backup*

Some thought that introducing a statewide virtual library, or any statewide initiative has the potential to introduce a number of unanticipated problems, particularly ones that might overwhelm the individual resources of a library, system or cooperative. Two potentially problematic areas discussed were reciprocal borrowing (where one location would be overwhelmed with collection use or another area overwhelmed with returns) and document delivery. This is a particular concern of small and special libraries as well as libraries likely to be large net lenders. Much can be learned about the issues and responses needed by systematically assessing early adopter Florida regional cooperative and other state experiences as a guide. As statewide initiatives go forward, these and similar concerns should be identified and clearly addressed with external backup support provisions.

#### *Database Duplication*

Library managers reported several instances of vendors negotiating separate deals with school and public libraries in the same community for the same database to be used by the same users. In essence, the taxpaying community paid twice for the same service. The worry was that elected officials, in tight economic times, would be in no mood to tolerate this type of duplication. Library managers want to move forward with licensed statewide digital content to avoid this problem.

### *Fee-based Statewide Library Card*

It was suggested that one way to fund and sustain the statewide virtual library was to charge a nominal fee for the statewide library card. All would be entitled to a local library card for free. But to take advantage of the services offered by the statewide virtual library, users would have to pay a fee to obtain a statewide library card. Fees from the card would be used to defer operating costs.

### *Document Delivery*

There was general recognition that a statewide virtual library's success would depend on being able to move library materials rapidly and cheaply to different locations throughout the state. There was general support for the existing DLLI system both in approach (outsourcing a statewide function's management to a cooperative and delivery to a private vendor) and effectiveness. There was one complaint that the system was too cumbersome and that there should be more use made of the U.S. post.<sup>13</sup> Reducing library staff involvement in processing a

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<sup>13</sup> One library manager was asked what would it take to get materials to people faster? The person responded:

"I have thought about this and feel the weak link is in delivery to a single location in the counties that provide many loans. Only one of these counties actually has activated Alleycat, participates in regional reciprocal borrowing AND is now paying for one day a week delivery to its branches. This is Pasco County.

To try to answer your question, I asked my staff to look at counties with a population of over 100,000 other than Hillsborough, Dade and Broward. I excluded those three counties because they have so many branches. The county that comes the closest when branches of St. Petersburg and Clearwater are included is Pinellas County. The attached chart shows the result and also gives the COST for the VENDOR alone for a year at the anticipated rates for 2002-2003. If these stops were added, the administrative and staff costs would increase. Although they make a small portion of the budget today, I would think that it would add about \$50,000 to the overall cost. Since the vendor cost on the chart includes stops already in the system, I think you could assume that there is room to add some of the other FLIN libraries that are not on the system. Basically it would double the vendor cost.

Assuming that the annual budget for Delivery now is \$600,000 and service to branch libraries in Broward, Palm Beach and Hillsborough Counties would add roughly 100 more service points three days a week (@ \$1,740 per stop per year for the vendor) an additional \$743,000 a year for a total of \$1,343,000 would be a conservative amount for a statewide delivery service that could reduce the time it takes to get books into the hands of clients to 3-4 days no matter what branch library they frequented.

I should point out to you the importance of paying the vendor a living wage. NJ kept the daily service cost down to \$5.20 per day for 5 day a week service and their vendor is now bankrupt and stopped service with NO NOTICE!

I have informally asked people how they felt about having books they requested on ILL come directly to their homes and generally everyone has said they want to go to a library and browse when they pick up ILL's. One business person indicated that they would pay for delivery to home or office if it was a business expense that they could deduct."

Subsequent discussions with the library manager indicated that the use of the U.S. post was regularly examined but found to be too expensive system-wide or on a more local basis.

request was the best way to increase delivery speed.<sup>14</sup> Issues that participants thought may need attention include:

- **Secure funding:** Document delivery is a core statewide library function. It is funded year-to-year using federal LSTA funding and local matching funds. The LSTA funding has been gradually reduced to around 25% of the total cost. Should this core service be funded entirely by the Division? Should funding come “off the top” of funds allocated for state aid?
- **Role of cooperatives:** A better approach to local library funding for DLLI may be to offer delivery, or additional pickup days of delivery as a benefit of membership. Some cooperatives are already doing this and reporting success.
- **Governance:** Outsourcing statewide document delivery management and delivery appears to work well. But is there a need for an advisory committee, made up of regional library representatives to provide input, particularly when delivery vendor contracts are re-negotiated?<sup>15</sup>
- **Participation:** When libraries were required to pay for the delivery service, some dropped out because their transaction volume was too low. Data suggests that in most cases this affected special libraries more than small or rural libraries. Data suggest that small and rural libraries are served adequately based on their transaction levels. Is this true? Are there other issues of equity? What can be done to encourage participation of low transaction libraries of all types? In some cases, delivery to branches (rather than just to a system) may be warranted. This is seen as a next step. But delivery to all branches might double costs of the system. In other cases, delivery should be more frequent (from 1 day a week to 3 or 5 days). Additional demands will be placed on the system when the statewide virtual library becomes operational. Is a study of these and other related issues warranted? At, minimum, much could be learned by assessing the implementation of the AlleyCat system for lessons learned.
- **Meeting demand:** Small and special libraries worry that too many external requests for materials will overwhelm their ability to fulfill the requests. Some special libraries are already overwhelmed. Large libraries worry large external lending demand will tax their staff and collections. Other libraries around the country have experience with implementation of similar virtual library components. The AlleyCat implementation experience may prove instructive. The experience from these pioneers should be sought. The Division may need to find incentives to encourage various libraries to participate or at least have contingency plans in place.
- **Increasing delivery speed:** This is obviously good for library users. But it also increases the willingness of libraries to lend. Libraries do not want to see their high use items sitting idle “in a truck somewhere” for 3-6 days awaiting delivery or return.
- **Workflow:** What will happen to existing interlibrary loan staff? Will such staff be needed for the first time at some smaller libraries? How will workflow change?
- **Multimedia:** There was concern that information in all of the formats collected by libraries all be made available for remote delivery.

<sup>14</sup>Several reported that anytime a staff member had to touch a request it added a day to delivery time. One way under consideration is by patron initiated interlibrary loan using an extended circulation feature.

<sup>15</sup> A move welcomed by the library manager noted above.

- **Home delivery:** Delivery of materials directly to users' homes appears to be of keen interest to some library users and elected officials. Conversations with the DLLI manager suggest that the costs of such a statewide service were prohibitive. There may be room for such a service provided on a regional or local basis. There may also be room for a user to select a delivery option when initiating an online ILL. One option could be one or more home delivery options (eg., delivery via U.S. Post) for which the library user pays.

Most participants believed that document delivery is and will continue to be a core service in the statewide virtual environment as it has been in the past. Indeed, citizen and library demand will increase for faster, cheaper delivery of materials as the statewide virtual library becomes operational. There was a clear increase in DLLI use and changes in workflow at many TBLC libraries when the Alleycat shared catalog was introduced. Studying the changes TBLC document delivery and Alleycat's impact on workflow could be very useful for anticipating the impact of the statewide virtual library on document delivery and other aspects of library operation. Close monitoring of the document delivery function will be needed to ensure the service remains efficient and effective.

#### *E-reference*

The meetings indicated that public and library manager demand for some form of electronic reference service exists in every part of the state across library types and is a logical part of the virtual library offerings. Several efforts are or will be underway regionally in the near future to prototype a statewide service. Needs mentioned by participants include: a shared digital reference collection, training for librarians providing the service, add Spanish language capability (consider other languages as well) and publicity once the service is underway. Various funding mechanisms were identified: state funded, outsourced to regional cooperative or company, if outsourced service might be obtained via state contract. There was no discussion of the impact of such a service on existing local library reference collections, staffing or service. There was the clear sense that the biggest job might be in negotiating the various agreements among institutions for the provision of service should a cooperative approach among libraries be chosen (as opposed to outsourcing the job to someone).

As with other services, ensuring equity among those unable to afford the service (if outsourced) or contribute to the service (because of poor reference collections or lack of staff) was important. One of the group of libraries that stand to benefit most from a e-reference service are small and rural libraries without reference collections and trained staff. But these libraries are unlikely to do so without external support.

#### *Image & Political Fallout*

Most believed that a statewide virtual library is likely to have a major positive impact on citizen and elected official views of libraries. What does the library community want beyond stable funding for the statewide virtual library (if not already secured), how can it be obtained? This may be an opportune moment. There may be an opportunity to increase state aid to libraries in other areas in the afterglow. Attention must be given now to how to reap the benefits of the

introduction of the statewide virtual library and determining what libraries want to gain as a result.

### *Impact on Local Funding of Libraries*

Some participants believed that careful attention should be given to the impact that the introduction of the statewide virtual library may have on local funding of libraries. Concerns raised include:

- Will some local governing boards see the introduction of statewide virtual library as making the local library obsolete?
- How to prepare governing boards for the cost shifting and reallocation necessary as a result of the virtual library or to take full local advantage of the virtual library?
- How much credit will the state take? If the state takes too much, local funding for local libraries will be reduced.

Libraries implementing similar projects in other states have had similar concerns. With sensitivity and advance planning the statewide virtual library should be a net win for everyone.

### **Special Populations**

External partners have often played a key role in the provision of local service, in whole or in part, to special populations of users. The following are special populations mentioned during the regional meetings that may need special attention over the next five years.

#### *Non-English language and immigrant library users*

Non-English language residents, particularly Hispanic language residents, were the most frequently mentioned special population in every area of the state.<sup>16</sup> While Spanish speaking populations appear to need the most attention due to their large number and rapid growth, some communities in Florida have 60 to 100 different languages commonly spoken (as a first language) by their residents. These populations have been quietly but dramatically growing and are likely to do so over the next five years.

Participants identified possible roles for external partners that included addressing some of the following areas:

- **Centralized language collections made accessible state-wide:** There is a need for foreign language digital collections (assembled from resources already available on the Internet as well as licensed collections) to be a part of the statewide virtual library. There is also a need for paper based foreign language collections located closest to the greatest concentrations of foreign language speakers but made rapidly accessible via document delivery statewide.

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<sup>16</sup> For a recent summary of Florida library efforts to reach Spanish-speaking populations see: Alpizar, Marla & Presti, Patricia. (2002, Spring). Reaching out to Florida's Spanish-speaking population. *Florida Libraries* 45 (1), 14-18.

- **ESL & literacy materials and training:** English as a Second Language (ESL) and literacy materials need to be made accessible statewide – using the statewide virtual library perhaps. Trained staff and continuing education for existing staff and volunteers is also a need.
- **Need for local library and Division personnel with language/culture skills:** Many libraries need to be encouraged to hire staff that speak the languages and know the cultures of their communities. Other libraries, aware of these needs, are finding it difficult to recruit personnel with needed language or culture skills. There is need for Division personnel to reflect the cultures and languages of the state as well, most obviously knowledgeable in Spanish language and Hispanic cultures.
- **Recruit Friends and volunteers:** Several library managers reported success with using Friends and volunteers drawn from the community to act as greeters (and interpreters in some cases). The Friends interviewed reported the need to recruit the next generation of Friends. Perhaps a statewide campaign is needed to recruit Friends and volunteers that mirror the community. One role for this next generation of Friends could be bridging the cultural gap for library staff until the next generation of library staff is ready to assume the role.
- **Multi-lingual translation service:** Library managers identified the need for a translation service to translate library forms, handouts, brochures, etc. for use by these special populations in their communities.
- **How to use the library as part of citizen education:** Immigrant populations need training in how to be a citizen and how to use publicly provided services, including the public library. These services may not have been available in their country of origin. Libraries may well need to be more flexible with these groups in their application of existing policies and/or make specific efforts to provide information about how to use the library and why. It may not be enough just to issue a library card. It is certainly not going to be enough to just issue a statewide library card for many English as well as non-English language library users.
- **Sensitivity training:** Several library managers from around the state urged some form of sensitivity training for all staff as a “short term fix.” There were a number of reports of staff, unaware of the consequences of their actions, causing a number of people visiting the library for perhaps the first time to feel unwelcome. “Some people are just ignorant about how the other person is perceiving what they are saying and doing. We got to reduce this occurrence among our staff.

Some thought portions of these needs are better addressed state wide. Many noted the cancellation of the 2002 FLA annual pre-conference on survival Spanish for librarians due to lack of interest. There are a number of public, private and international agencies seeking to provide related services to this population. The IFLA/SEFLIN International Summit on Library Cooperation in the Americas is an important new initiative deserving attention and support.<sup>17</sup> Are partnerships with a wider range of organizations both here and internationally with parallel missions possible? Should the Division be the one of the external partners to identify and pursue

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<sup>17</sup> See IFLA/SEFLIN International Summit on Library Cooperation in the Americas <<http://mylibraryservice.org/IFLA-SEFLIN/>>



them? There appears to be a need for clarification of mission and coordination of effort among external partners in this area.

### ***Illiterate population***

See discussion under public education, literacy needs below.

### ***Remote users***

All agreed that the newest and fastest growing special population throughout the state are remote users of library services. This was a small group even five years ago. The state-wide virtual library will have a significant impact on this population. But participants asked: Will it meet all their needs? Whose needs, what services, how, when?

Florida community college libraries have some experience with the remote user population. At present, data suggest that remote users may represent 75% of the total use of Florida community college library resources. With 75% of library use occurring outside of the library buildings, libraries will need to know a great deal more about their remote users than they presently do over the next five years. Early adopters, such as community college library managers point out that access is not enough. For example, users will need instruction in selecting and using the digital resources that have been made accessible.

Some pointed to the difficulty of changing “mind sets” from “print based in physical structures to digital in virtual structures.” Retaining old mind sets are particularly dangerous at library schools and among other external partners because without a switch at this level change throughout the state will be slowed. Ways need to be found to reallocate resources to where the use is rather than where library buildings are. Some thought external partner studies and planning is needed in this area. Some public library managers urged the Division to play an active role with vendors in facilitating access and use by remote library users.

### ***Local government***

Several public library managers mentioned the need to help local public libraries help local governments manage their information needs better, particularly in relation to the use of the Internet. They noted the importance of being able to tangibly show the library’s value to local government, not just citizens, for securing funds. The introduction of the Internet gave libraries established the libraries worth in new ways. There is a need to find new ways to continue assisting local government in this way.

### ***Homeschoolers, Charter Schools***

Homeschoolers make heavy use of public libraries throughout the state. Several areas mentioned programs recently developed to support charter schools – who often have no library resources. No specific suggestions were made regarding external partner activities.

### ***Pre schoolers, parents and caregivers***

Several participants mentioned that assistance was needed for reading and school readiness, the provision of services and collections to day care centers (that are not required to have an education component) and for help for parents of this age group.

### ***Seniors***

Library services to seniors were often mentioned as a special population to target. But there were only two specific suggestions made for activities: provide transportation for seniors who could not travel to the library in certain areas of the state and address the needs of seniors with hearing or sight disabilities. The size of the state's population is known and that it is a growing population. It may make sense for the Division to initiate its own study, perhaps in conjunction with other government and non-profit service providers to see what the specific needs of this important population are.

### ***Children's and young adult populations***

Participants in all areas of the state mentioned the children's and young adult areas. The need here appears to be compounded to some degree by the difficulty of hiring and retaining personnel in this area. Many also felt that better coordination was needed between the Division and the state Department of Education so that limited resources could be better used. Several participants pointedly remarked that the Division has given the impression that it does not care about developing programs and services in these areas.

Specific recommendation for activities include:

- Prepare summer reading lists and distribute them in time for local acquisition of materials prior to the end of school.<sup>18</sup>
- Target the 0 to 3 year old population and their parents. This group is presently being neglected. "Babytime" programs, where they exist, are very popular.

The clear sense from the participants' comments was that there is a present need for quality children's and young adult programming and services and that that need will grow over the next five years.

### ***People with disabilities and place bound***

Specifically mentioned were people with vision and hearing impairments but only two ideas were discussed: bring more libraries into ADA compliance and creating and making more adaptive toy and tool collections available at public libraries. Local non-profit agencies may not have the latter and may draw on the library for support. Place bound citizens include those who are home bound. In addition, several public library managers in both rural and urban areas mentioned the need for libraries to investigate the feasibility of providing transportation to and

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<sup>18</sup> An existing reading list produced by the Department of Education's, Sandy Ulm, (not for this specific purpose) is very popular.

from the library particularly for seniors and for parents and their pre-school children. Not discussed in any detail was the potential use of the statewide virtual library to deliver programs and services to these special populations over the next five years.

### **Personnel**

Addressing personnel issues were a high priority for most of the participants interviewed. Nearly every library system reported that they had positions open at every level that they could not fill, let alone obtain the highest quality staff. Issues mentioned include recruiting and retaining qualified staff to fill jobs with changing requirements, little continuing education opportunities, in less secure and less attractive working conditions and at lower salaries when compared to peer organizations. “We are asking staff to know and do more and change what they do more frequently without a change in pay or much continuing education.” There was general agreement that personnel problems were at a crisis stage or would be at crisis stage over the next five years in many parts of the state.

#### *Coordinated effort needed to increase salaries*

Participants at every meeting in every location mentioned the need to improve salaries at every location, library type, and at every job level within libraries. Library managers raising the salary issue were not making personal complaints by disgruntled librarians. The issue was raised because noncompetitive salaries are already affecting and will increasingly affect the ability of libraries to perform their missions over the next five years. Participants emphatically note that the salary issue is not solely local, without the ability of external partners to influence salary increase.

The message was simple. The salaries Florida libraries offer are not competitive when compared to other locations in the U.S, when compared to other opportunities now open to librarians, or when compared to peer local government personnel. Florida’s libraries will be significantly changed for the worse unless local libraries and their external partners act to improve salaries within the next five years.

Recommended actions by external partners including the Division include:

- **Develop uniform job descriptions** for common library positions in all library types. These positions should include those requiring a M.L.S. degree, other professional positions requiring other degrees, as well as paraprofessional positions. Each position covered should have two descriptions. One description should be directed toward library manager and employee. The second description should be directed toward the human resource manager of county government or university or school district describing the position in human resource terminology (or the terminology of those that control hiring and salaries locally). These second set of descriptions are the more important at the moment. The resulting descriptions should relate the library position favorably to other common local government positions. “We need to get out of the habit of comparing ourselves to other librarians, we need to compare ourselves to other government workers...and show the big inequities.” ALA is contemplating doing a national study

with a similar focus in the 18-24 month time frame.<sup>19</sup> But no one locally was willing to wait for it.

- **Division recommended, tiered, salary standards:** may be useful. These salary standards should be keyed to the uniform job descriptions. The standards should reflect current, local, conditions in Florida (as well as beyond) and reflect the work environment. So that if non-library peers are on 10 month contracts the differential is reflected.
- **Peer comparisons: library and non-library personnel:** The intent of the proposed study would be to concisely highlight common inequities in salary and work conditions between library personnel and peer non library personnel.<sup>20</sup> An example commonly used example mentioned was to compare a newly hired teacher with a masters degree to a newly hired, M.L.S. librarian. But similar inequities should be highlighted at other levels notably in the paraprofessional positions. Inequities at every level, were regularly noted by study participants. There may also be merit in comparing Florida library salaries with regional and national peers.<sup>21</sup>
- **Florida library school placement data:** Library managers would find it helpful to show county commissioners and human resource personnel a brief report presenting data that shows students with MLS degrees or the equivalent are commanding X salary in non-library positions for which they are qualified, Y salary in library positions, as compared to Z salary presently offered by the local government.
- **Investigate the impact of the Georgia state library's effort** to stimulate improved salaries by subsidizing library directors salaries through out the state.

The strong sense was that during this next period there was a need for librarians and their external supporters to make the case to their local funders for sustained salary improvement.

### *Recruitment and placement of library personnel*

Florida libraries need a formal plan and system for efficient and effective library recruiting and placement that coordinates and maximizes the impact of local library and media center and external partner participation. Such a system would address the following areas:

- **Improve the image of library personnel:** The general public, immigrants, and library personnel themselves need a better understanding what library personnel do in today's libraries and its importance.
- **Career development activities:** Schools (from elementary through college), governments, and private groups have various, formal career day events. Library personnel need to be present at these events (with pay), with a multimedia package (including: brochures, reading lists and videos) of materials to distribute that are designed

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<sup>19</sup> One source of future ALA actions is: Friedman, Mitch. Special presidential task force on better salaries & pay equity. <<http://www.mjfreedman.org/tfhome.html>>.

<sup>20</sup> For one recent effort see Colorado State Library's Library Research Service. and LRS. (2002, February 12). Earnings of library staff in the mountain west low compared to workers in similar jobs. *Fast Facts*, No. 182. <<http://www.lrs.org/documents/fastfacts/182salaries.pdf>>.

<sup>21</sup> See for example, the Colorado State Library's Library Research Service. (2002, January 25). Managers' salaries for Colorado's largest public libraries Fail to Keep Pace with Regional, National Trends. *Fast Facts*, No. 181. <<http://www.lrs.org/documents/fastfacts/181plsals.pdf>>.

to educate and excite people choosing a career. Efforts may be needed to develop library page and work-study programs and improve their career development component.

- **Study other professions recruiting efforts:** There is need for a study of what other professions facing similar recruiting challenges are doing to recruit future staff?
- **Florida presence at other state and national recruiting events:** Participants identified the need for a Florida library presence as other state and national recruiting opportunities (for example annual conferences).
- **One stop Florida library personnel placement shop:** There is need for a single (web-based) place where employers can advertise positions and potential employees can find all available Florida library positions. Additional related assistance might also be offered (e.g., employee resumes might be posted for a fee). This service then needs to be advertised throughout the state, region and nationally on a systematic, regular, schedule.
- **Target both traditional and non-traditional library skills based on need:** Participants suggested the need for catalogers had dwindled. Children's and young adult librarians were difficult to find and greatly needed. Reference personnel need to be people-skilled teachers rather than arcane question answers.

The general tenor of the comments in this area was that Florida libraries are, already, or will be facing a crisis in attracting and retaining qualified library personnel over the next five years.<sup>22</sup> The Division, library schools and FLA may have significant roles to play here. But the recruiting crisis is too great to leave these activities to chance or good will.

### *Re-positioning M.L.S. employees*

The general consensus among library managers is that there will not be enough staff with the M.L.S. degree available to meet demand in Florida over the next five years, and beyond. Existing M.L.S., as well as new M.L.S., employees increasingly do not possess the range of skills necessary to meet all of the demands for professional level skill.<sup>23</sup> M.L.S. personnel lacking certain skills (most often mentioned are people skills and teaching ability) are viewed as an increasing liability. Those possessing the M.L.S. as well as those on their way to achieving the degree are often not from the same, race, culture, or language backgrounds as those they will serve.<sup>24</sup> Existing M.L.S. personnel often want to work part time and are demanding better working conditions. What is to be done?

A common response to this crisis is to say that perhaps M.L.S. personnel are needed in as many positions as they presently occupy. The general thought is that M.L.S. personnel would move up the hierarchy and fill the management positions. But this assumption was regularly challenged. External managers of libraries might well be more comfortable with M.P.A. or M.B.A. personnel. Some thought that perhaps there is room for M.L.S. personnel to fill

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<sup>22</sup> The need for better library recruitment is a national problem. See, for example, Lynch, Mary Jo. (2002, March). Reaching 65: Lots of librarians will be there soon. *American Libraries* 33 (3), 55-56.

<sup>23</sup> Specifically mentioned as lacking were: "people skills," teaching ability (rather and question answering), reading instruction, linguistic skills, and technologists and technology managers. "Even recent M.L.S. graduates, at the top of their game, can not do it all."

<sup>24</sup> Often having staff that reflect the racial, ethnic, linguistic or cultural backgrounds of the community is as important as skills obtained via a library degree.

specialist positions, similar to programmers or system staff. Is this the role M.L.S. personnel, and those entering the profession, see for themselves? Increasingly, paraprofessionals, taxpayers and local funders are cutting away at the “mystique” surrounding the M.L.S. and asking, are personnel with this degree really necessary? M.L.S. personnel themselves are raising the question, particularly when the mystique doesn’t translate in to an equivalent paycheck.

A number of Division roles were suggested including:

- Examine state administrative regulations to see if they reflect reality on the ground;<sup>25</sup>
- Lead a professional level discussion of the role of M.L.S. personnel in libraries of all types;
- Develop a new model for libraries of all types that include personnel with varying skills, certificates, and degrees;<sup>26</sup>
- Take administrative and other action to position M.L.S. (and other) personnel appropriately within the library organization and society with appropriate working conditions and salary suitable to their new positions.

The message from library managers was clear: the mystique is wearing off. This wasn’t necessarily bad because, as one person stated, the mystique, “traded no one knowing what we did and no one bothering us for no one caring or willing to pay for our services.” External partners, and in particular the Division, must embrace this reality and adjust tactics to ensure the highest quality library service while advancing the library profession. Said differently, external partners must recognize and address the needs and aspirations of all of the personnel that it takes to run a modern library, not just those possessing an M.L.S.

### *Certification of paraprofessionals*

There appeared to be interest in pursuing certification requirements for library paraprofessionals statewide<sup>27</sup> under certain conditions, specifically:

- Certification programs should be available to paraprofessionals throughout the state. It was no clear whether the Indian River Community College Library Technical Assistant AS Degree distance education program<sup>28</sup> made this point moot.
- Certification was tied to civil service pay grade improvements. That is, there would be a pay increase as a result of adopting certification requirements.

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<sup>25</sup> Some noted that library administrators are already moving to fill professional positions with personnel without the M.L.S. State law and administrative practice may need to be adjusted to reflect this reality or to enable libraries to obtain the best people for the jobs.

<sup>26</sup> The reality presented to the interviewer by study participants, not different from many other states, was that many medium to large Florida libraries already rely on personnel from a variety of information related disciplines beyond library science, notably public or business administration, education, computer science, and telecommunications. This will become the norm in Florida libraries over the next five years. Many small libraries cannot attract M.L.S. personnel now. Library managers will need education, models, and support in their efforts to integrate staff from a variety of professional backgrounds into the profession, retaining such staff, and providing them with rich career paths.

<sup>27</sup> One participant noted that New York had a certification process for paraprofessionals.

<sup>28</sup> See <<http://www.ircc.cc.fl.us/learnres/libsrv/libresrc/Ita.html>>

- Paraprofessionals would have the option of “testing out” of any certification requirement (rather than taking courses on subjects in which the person was already skilled).
- Scholarship and other financial assistance was made available.

The demand for certification programs were there. County governments in some areas were willing to re-class jobs if certificates were required.

### *Staff should reflect the community*

A common concern throughout the state is finding staff (Friends and volunteers) that mirror the racial, ethnic, linguistic, and cultural composition of the communities libraries serve. Several pointed out that the problem extends to the Division and the state’s library schools as well. Both a short and long term strategy were needed to address this area. In the short term, sensitivity training and use of community volunteers as greeters has worked at some libraries. Longer term, will require concerted, active recruitment and training programs involving a number of external players.

### *Improve working conditions*

Study participants raised a range of related issues in this area with two key themes:

- **Libraries are oftentimes no longer safe or attractive:** “Libraries are no longer secure, quiet places to work. They are peopled with noisy, aggressive, sometimes dangerous patrons.” There is a need for a study of ways to improve library security and the work environment. How are other businesses and organizations that serve the public addressing this area? The study should be followed by a continuing education program to move effective approaches out to Florida’s libraries.
- **There are serious library working condition inequities for librarians in the state:** Several participants noted that library staff working conditions (e.g., hours, weekends, summers, etc.) were not on par with their peers in related local employers (from the schools and local government to Walmart). A study in this area could also be used by local library managers in salary negotiations with local elected officials.

Libraries must offer working conditions that are as good or better than the competition if they wish to attract and retain personnel over the next five years.

### *Target the reduction of staff turnover*

Several noted that one way to improve the employment situation was to reduce existing staff turnover. Existing library personnel have already expressed an interest in working in the library and have received training. Several felt the need for a study to examine existing problems and to find ways to provide incentives for the retention of library staff.

## Staff Education

At one meeting a person commented that in the past, education was geared to preparing the young for their lifetime careers. Yet the speed of technological innovation guarantees that you can't be alive for eight or nine decades without needing to retrain multiple times throughout your worklife. A recent National Research Council study asserted that a worker's 'occupational half life'--the span of time it takes for half of a worker's skills to become obsolete--has declined from 7 to 14 years to 3 to 5 years. And it is anticipated that the average worker will hold seven jobs during his or her working life.<sup>29</sup>

There was general recognition that continuing education (CE) at all levels of the organization, at all types of libraries, and with multiple partners, will be essential over the next five years. Library managers identified a range of constraining factors that must be addressed when planning for the continuing education efforts over the net five years, including:

- **Not a local priority among elected officials:** Continuing education is presently given low or no priority by local elected officials and funders despite its high priority among library managers. As one cooperative manager summarized, "There is no money in local budgets for training. The only way county officials will pay for training is if it is part of the membership fee."
- **Difficult to get away:** Librarians at small or rural libraries, special libraries, school libraries, and branch public libraries all report difficulties getting away (even when they are willing to pay). In some cases, the library must close if someone goes for training. Unlike public schools, libraries, so far, are unwilling to close for continuing education purposes. In many cases, CE costs are not subsidized (including travel costs, tuition, hotel, meals).
- **Distance from training site a factor:** Sites where continuing education are offered remain to distant for many rural librarians and staff in the state.
- **Catch up is difficult:** One librarian interviewed reported reading in a business weekly that, "Staff in the top companies in business average 400 hours of training per year." She went on to say, "I would be thrilled to give my staff forty meaningful hours a year. "What we do to ourselves is terrible."
- **Library schools are likely not the primary continuing education providers:** See the discussion under library schools below. Can community colleges meet some of library professionals continuing education needs as they are already meeting paraprofessionals needs?

Priorities mentioned include the following areas.

### *Preparing the next generation of senior library managers*

With senior positions likely to open in unusual numbers over the next several years, many believed it is particularly important to prepare middle managers to assume senior roles. Preparation includes assignments and mentoring that allow middle managers to develop senior

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<sup>29</sup> Dychtwald, Ken. (1999). *Age power: How the 21st century will be ruled by the new old*. Los Angeles: J P Tarcher.



management perspective and skills. There was general agreement that the demand was acute enough to warrant a structured program of education, experiences and mentoring to assure quality candidates for these senior positions. One person identified SEFLIN's Sun Seekers program <<http://www.seflin.org/sunseek/>> as a great idea in this area.

*Continuing education focused recurring management issues*

There were a range of issues mentioned including

- Local vehicles/structures for funding public libraries: the pros and cons of each;
- Successfully obtaining funding from local government: Strategies & tactics;
- Planning library services for explosively growing population areas;
- Using statistics and standards persuasively with local elected officials;

A package of associated activities should occur for each issue discussed including: a conference, videotapes of presentations, content materials and bibliographies, and contacts.

*Identifying and training the next generation of middle managers on the job*

Most small library, branch and middle managers must learn their craft on the job, yet there is often little formal or even structured, continuing education for these managers. Some thought that new library managers, particularly of small libraries, would benefit from a formal program designed to introduce them to their duties, opportunities and resources available. Participants at several locations mentioned the need to focus attention on small library manager leadership skills.<sup>30</sup> Continuing education in this area needs to focus on both specific practical job skills and at the same time providing opportunities for "thinking about the big picture issues and how they and their communities fit in..."

*M.L.S on the job*

Study participants regularly mentioned the need to find new ways to obtain the MLS degree on the job. No new ideas were identified but the interest and demand is high. The graduate intern program<sup>31</sup> available in certain areas of the state seems to have been a success. Extending this program to other parts of the state, in particular to rural areas should be actively be considered.

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<sup>30</sup> For an example of such programs see: Illinois State Library. (2002). Annual Small Public Library Management Institute. <<http://www.library.sos.state.il.us/library/isl/training/splmi02.html>>. For an example of another approach see: Texas State Library. Small Library Management Training Program. <<http://www.tsl.state.tx.us/ld/workshops/slm5/index.html>>

<sup>31</sup> One example is funded by the Broward Public Library Foundation offers a paid job at the library, and a scholarship to complete the degree. The target is Library I positions where there is a staff shortage.

### ***Paraprofessional training program***

Indian River Community College offers a Library Technical Assistant AS Degree on campus and via a distance education program.<sup>32</sup> A library technical assistant program will start this September at the Hillsborough Community College Dale Mabry campus.<sup>33</sup> One person thought that a problem with a program of this type in one area is that after several years all of the local (not defined) paraprofessionals are trained and the program languishes. The distance education program appears to have worked for Indian River. One suggestion is to move faculty around to different part of the state on a systematic basis so that all would be covered. But there was no exploration of whether faculty could be found to “circuit ride.”

There is need for a systematic program of continuing education offered to this key staff group in every part of the state. Mentioned were annual Indian River Community College information fairs (including targeted exhibitors) that was apparently canceled this year and a series of workshops targeted to their needs offered at several locations annually. There is also a need for instructional modules focused on library operations commonly performed by paraprofessionals –focused on the task, but also its history and importance. These modules are particularly important because of the high turnover in some parts of the state in these positions

### ***Continuing education in non-IT related topics: Mixed message***

There seemed to be a consensus building for re-focusing continuing education efforts to include non-IT related skill areas, particularly the uncommon (bookbinding) and specialized skills. There was need to train public service personnel in group teaching techniques. It was not that the need for IT training had ended – the need for advanced IT education (described as not being introduction to using the computer or the Internet) continues. The need for general, basic information technology, software and Internet training remains in the Panhandle and among paraprofessionals across the state where turnover is high. The need for managing library servers and securing the technology is already an issue. However, many of those interviewed believed that during the recent past, non-IT related education was neglected in the push toward staff computer and Internet literacy. Examples of non-IT topics include: customer service, reference interview, handling aggressive patrons.

There was interest in the promotion of job exchanges within and across library types and at all levels. This was viewed as both career development and a means of increasing communication and community within the Florida library profession.

### ***Continuing education role of the cooperatives***

Most believed that every organization feels “stretched” to meet demand for staff continuing education. It would be a mistake to believe that one external partner, be it system, cooperative, state level or private company could, by themselves, meet the demand in this area.

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<sup>32</sup> See <<http://www.ircc.cc.fl.us/learnres/libsrv/libresrc/Ita.html>>

<sup>33</sup> Contact Patricia Manack <[pmanack@hcc.cc.fl.us](mailto:pmanack@hcc.cc.fl.us)>. For a national list of library technician programs see: Council On Library/Media Technicians. *U.S. library technician programs*. <<http://library.ucr.edu/COLT/ltprograms.html>>.

Cooperatives have played and will continue to play an important, indeed central, continuing education role. Cooperatives are “close to the action.”<sup>34</sup> They can poll their members needs and deliver continuing education closer to where librarians work. Some cooperative managers see their central mission of the next five years to be continuing education for their members. Other<sup>35</sup> cooperatives do not see themselves as the sole or even chief provider of staff education for their members, let alone beyond. Concerns raised include: What about staff at non-member libraries? How can a good program in one cooperative or one organization anywhere in the state (or beyond) be transferred to other parts of the state?

### ***Role of SOLINET***

Several participants commented on the utility of some of the SOLINET training offerings. Coordination with this external partner as continuing education plans are being developed will be to the benefit of all.

### ***Role for private enterprise?***

Several library managers reported success using private companies (e.g., CompUSA) to provide continuing education for library staff. Clearly staff continuing education is a huge task and multiple providers are needed. Is there any role for the Division to explore a state training contract with several of these companies to provide continuing education for library staff throughout the state?

### ***Role of government***

Several library managers noted that library staff had participated in training opportunities offered by their local government and taught various Internet related topics to other local government officials as well. State government employees have need for continuing education, particularly related to information technologies. Is there a role for the Division to arrange quality, discounted, continuing education related to information technology and management, for state and local government staff, including librarians, over the next five years?

### ***Provide incentives to educators to extend their efforts***

Participants point out that education, workshops and teaching materials produced in one part of the state by a library system, cooperative, the Division or at library schools (see related discussion below) are not always known or available to library staff in other parts of the state. Can modest incentives be used to extend quality, specialized (or unique) continuing education offerings developed in one area of the state to the rest of the state? Can the academic community be interested in further meeting the pragmatic, non course-based needs of library managers and staff?

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<sup>34</sup> A Panhandle participant noted that this statement isn't always true. “The Panhandle regional cooperative's headquarters is 120 miles away from my library.”

<sup>35</sup> Participant comment: “Our cooperative recognized that we are not the sole provider of staff education for many of our member libraries. We do consider ourselves a very important provider, particularly for technology training and library soft and hard skills. We consider customer service education to be a library soft skill.”

### ***Distance digital education: Boon or bust***

Participants were uncertain regarding the role of distance education technologies in meeting the demand for staff education. Some noted that the local infrastructure was not always in place (or newly created) to enable the use of digital technologies to meet staff needs. Others reported varied success using these technologies. There was not a clear indication of when distance education use was effective. Several expressed interest in exploring video conferencing as a mechanism for delivering continuing education as other states have.<sup>36</sup> The next five years may be the time frame to answer questions as to the efficiency and effectiveness of these technologies.

### ***Combine digital infrastructure with face to face contact***

There was interest in the development of a shared, digitally-based, staff development infrastructure that would address pragmatic, focused, needs for education or re-skilling. Digitally available handouts, Powerpoint presentations, short videos, bibliographies (linked to the full text), and courseware could be part of this system. These materials should be freely available to all types of libraries. This was seen as a supplement to face-to-face instruction rather than supplanting it. Courses, degrees, or certification (beyond the MLS) did not add incentive.

There was general agreement that the next five years should see a major effort to “raise the bar on skills across the board,” by offering “meaty” presentations rather than just another meeting, and to establish a culture of continuous learning as an accepted core of everyone’s job description.

### **Public Education**

Demand for public education, particularly related to literacy and information technologies and their use, is rapidly growing and becoming central to the libraries’ mission. The principal constraints are lack of technology, and staff that are willing or capable of meeting the demand. There was administrative frustration with staff who believed that public education was “not part of their job description.” But there was new willingness on the part of library managers to buy/rent trainers on a temporary basis or hire temporary or permanent staff, with or without the MLS, who have the interest and background to be effective library educators. MLS credentialed staff who are unwilling to teach are viewed as an increasing liability.

### ***Literacy needs***

Many, but not all, libraries view a range of literacy activities as becoming increasingly central to their mission over the next five years. Two opposing views were heard:

- “We can be so short sighted sometimes. We will not have library users tomorrow if we don’t start educating our children today.” compared with,

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<sup>36</sup> For a well developed program see: Texas State Library. (2002). Video conferences. <<http://www.tsl.state.tx.us/ld/workshops/videoconferences/>>.

- “Literacy education is not a primary role for my library. Our focus is providing leisure reading and information to our middle class users. Literacy appears to be out of scope and I would need to see what is in it for my library before I considered a change in mission.”

Many of the public library managers interviewed saw literacy activities as being increasingly important over the next five years.

Participants described the range of library literacy activities existing or contemplated at public libraries over the next five years to include:

- **English as a second language** and related literacy services for immigrants: Libraries in every area of the state expressed the need for literacy efforts in this area. In some communities in the state well over 60 foreign languages are spoken. Literacy activities will need to be combined with introduction to citizenship and use of such public organizations as libraries. Principal need mentioned for centralized (and/or digital) foreign language materials collections, training materials, and multilingual program brochures and catalogs.
- **Preschool reading readiness**: including activities with day care centers (who are not required by law to provide an education component), with parents of new born children, story hour activities, etc.
- **School age literacy**: These activities supplement school activities or provide alternative mechanisms for this age group to become literate. Activities include summer reading programs, assistance to home, charter and alternative school populations, after school programs (including homework help),<sup>37</sup> supplemental tutoring, and work with at risk populations (e.g., teenage immigrants).
- **Adult & workplace literacy**: Several reported successful use of Learn-a-Test software (offering assistance with common tests such as GED, FCAT, SAT, and Armed Forces). Software of this type could be offered via the statewide virtual library. Several noted successful programs to provide literacy training for employees at large local concerns.
- **Computer literacy**: The need for basic and moderate levels of computer literacy will continue over the next five years in many areas of the state.
- **College preparation library literacy**: At present, there is little coordination of preparation among school, public, and academic libraries to prepare high school graduates to effectively use the library in college.

The need for literacy education in a variety of forms and targeted to different individual and situations is not new, although demand for computer literacy education is high and literacy education for immigrant populations may be rising.

Libraries have many potential partners in the literacy effort. Libraries will need to clearly define their role in this area as a result. Roles mentioned include:

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<sup>37</sup> A good example is Broward County Libraries’ After school @ Your Library program which combines homework assistance, reading practice and computer use using paid educators with groups of 20, 5-12 year olds.

- **Coordination of effort:** Link and bring people and organizations together across agencies.
- **Provision of collections and materials:** Providing other organizations, instructors and individuals with literacy materials or advising on their purchase.
- **Provision of meeting space:** Providing a convenient place for individuals and organizations to conduct literacy instruction.
- **Trainer and tutor:** Direct provider of tutoring services.

Roles mentioned for external partners over the next five years include:

- Arrange coordination and partnerships with state and federal literacy efforts (government, non-profit and private) so that public libraries are a visible player. One partnership needing further attention is state level coordination of effort between the Division and the Department of Education.
- Core collection provider (in some cases via the statewide virtual library) for targeted groups, in particularly the establishment of centralized foreign language collections. Specific software mentioned includes Learn-A-Test (presenting SAT, GED, FCAT, armed forces and other popular tests) and PLATO (for math tutoring).
- Identification and distribution (in some cases via the statewide virtual library) of high quality instructional and train the trainer materials. Included should be a package of materials on establishing a literacy program at the public library.
- Literacy staff development: literacy staff members are not commonly reading specialists, indeed they are often volunteers from other professions. There is need for the dissemination of basic and advanced literacy instruction theory and practice techniques.
- Representation and advocacy (coordinated with other agency and non profit groups), at the state level with the governor and legislature, for literacy interests.
- State wide publicity that positions the library as a place to go for literacy instruction.
- Development of a package for public library managers regarding the provision of literacy instruction for large local businesses.
- Development of systematic methods of evaluating literacy efforts and reporting results for statewide (and national) aggregation. There is a need to shape opinion leaders views of how to measure and define successful literacy instruction efforts.
- Communication, including alerts regarding in-state and out-of-state activities and resources, participation in the creation of directories of literacy activities by location throughout the state.
- Development and diffusion of programs, services, instructional modules, manuals and activities that support literacy efforts at libraries in the state.

Literacy activities will become increasingly important for many public libraries throughout the state over the next five years. External partnerships and coordination will be essential.

### ***Public education: Information technology related constraints***

Library managers identified the need for facilities and trained staff as constraints to the provision of public education, particularly IT related education, to the public. The need for information technology related education will increase dramatically as the statewide virtual

library becomes available. Greater attention was needed to providing more than the basics to an increasingly sophisticated public.

### *Role for external partners*

Several areas where external partners could help were identified including:

- Develop quality instructional modules and courseware in areas of shared need to be available to all libraries statewide. This courseware should take advantage of the technology now in place but not exceed what is available at most libraries. These modules should be available in several languages at minimum.
- Develop instructional modules for all content and services introduced on the statewide virtual library.
- Provide access to formal and informal distance education opportunities in a range of subjects as part of the statewide virtual library.
- Adjust staffing requirements, legislation and regulation to reflect the need that libraries face for new skills with new professional requirements other than the MLS.
- Develop level of service standards in this area.
- Mount a marketing and public relations effort to position the library in the public's mind as the place to go to learn about new information technologies.
- Assist local libraries to obtain adequate computer labs and clusters. In some communities this may mean brokering joint use facilities. Developing minimum standards in this area would be useful.
- Devise mechanisms to share good instructional programs developed in one part of the state or in one type of library with all types of libraries throughout the state.

The need for library public education efforts will be a growth area over the next five years as both technology and content become more available across the state.

### **Cooperative Purchasing & Processing**

There was interest from participants in further aggregation of demand for common library purchases and processes if by doing so, price was reduced and quality maintained (or improved). The basic notion was: can state or cooperative contracts and other mechanisms be used more effectively to reduce costs particularly for time or labor intensive library processes? Areas specifically mentioned include:

- **Less popular licensed databases:** There was general recognition that not every database that Florida libraries want will be available as part of the statewide virtual library. Yet there might be a number of libraries interested in licensing some of these less popular databases. There was interest in an external library broker for the purchase of less popular databases. There might also be a demand for external serving these databases as well (using the statewide card as authentication perhaps).
- **Bulk book and serial purchases:** There was interest expressed for exploring volume purchases of serials, large print books, audio and video items, and foreign language materials at reduced cost.

- **Videos:** Schools and libraries often purchase copyright access to the same videos, could this be done cooperatively and statewide?
- **Web development and design services:** Can a library savvy web design service be provided for a fee by one or more library cooperatives?
- **New & retrospective centralized cataloging and processing:** These services are available in some regions and not in others.
- **Centralized storage facilities:** Participants at several regional meeting locations, and from a range of library types expressed interest in participating in centralized storage facilities for lesser used materials. The sense was that an external partner, like the Division, would coordinate locating a suitable space, conducting the negotiations or enlisting the local library participation.
- **Library related software and hardware:** Specifically mentioned (beyond what is already offered) was integrated library systems and network. This could be one way to reduce the number of platforms and software in use by providing positive incentive to purchase a limited number of quality systems. Existing opportunity to purchase workstations and popular software via state contract is valued.
- **Staff continuing education:** Several libraries reported success using private training companies (e.g., CompUSA). Is it worth exploring a statewide contract in this area with several private suppliers?

The sense of a number of individuals was that participation in cooperative purchasing and processing should include libraries of all types. There may well be room for partnerships and consolidation of services with others who play a purchasing role for libraries and other related organizations. The external purchaser does more than obtain a reduced price for participants. The external purchaser identifies suppliers, sets de facto standards; negotiates price; determines/assures quality and provides libraries with information that might otherwise be time consuming to obtain.

### **Information Technology (IT) Needs**

With the exception of the Panhandle area, the need for additional assistance in purchasing basic information technology was not mentioned. Apparently the message has been conveyed that funding in this area must come from local operating. It may be that the problem has only been postponed due to the recent introduction of Gates equipment. If this is the case, continued efforts to get local funders to budget for replacement and new information technology costs should be given a priority.

The argument made by Panhandle participants is that they lag technologically behind the rest of the state -- "and what is old elsewhere in the state is new to us." Many state libraries, including the Division in the past, have made use of LSTA funds to ensure equity of access to technology in those libraries that lag behind the others. Other states have found the introduction of statewide virtual library components to be enough of an incentive for local funders to support the necessary information technology in areas that lag technologically.<sup>38</sup>

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<sup>38</sup> Note: The Panhandle is not the only region of the state with IT equity needs. It is just that the topic surfaced in a discussion with Panhandle library managers.



Two, near term, areas that may require attention are addressing the continued inequity in telecommunications costs and developing affordable solutions to common server problems (e.g., cheaper firewalls and network security solutions). Telecommunications costs in Florida, as is the case elsewhere, seem to be highest for small rural libraries that can least afford to pay them. There was the hope expressed by several participants that the state would create an e-rate program (minus the paperwork please) to address these concerns.

A number of participants would like Division assistance and guidance with major IT planning and purchases. Many commented on the importance of the advice received from the Division consultants for smaller IT purchases. At present, they do not know whom to turn to at the Division. Many suggested the Division hire staff to address this lack of expertise in such a critical area.

Most small libraries do not have any IT personnel or rely on community volunteers or other local government agencies. As a result, they are looking for external support to do all the tasks an IT manager would perform. IT is likely that aggregating up the demand for IT managerial assistance (and IT itself) will continue during the next five years. The Division and others will need to monitor for useful solutions for these libraries to pursue.

### **Support for Experimentation and Innovation**

One role successfully played by external partners is to foster experimentation and innovation in public library practice. There was widespread support continuation of these efforts over the next five years. Immediate areas of future innovation identified included: 24x7 reference services, use of video conferencing for continuing education (for staff and public), services to remote users, wireless networks, developing cheap but effective firewall and server security solutions, the future use of PDAs or laptops to accomplish library related work. Several groups discussed the impact of outsourcing all (e.g., to LSSI) or some of libraries' core functions. What will be the impact on libraries and their communities? What will be the relationship between public and outsourced libraries?

A key problem needing attention is figuring out better ways of diffusing an innovative idea, practice, or partnership from point of origin to the rest of the libraries who could take advantage of the innovation in the state.

Several participants pointed out the need for funding innovative projects for longer than they are at present (generally 1-3 years). The argument being that many projects are cut off just as they are beginning to demonstrate success and thus just as a local funding base is developing to replace external funds. This argument is familiar to all experienced funders as are the funding constraints. Are there better ways to structure the transition from an externally funded innovation or experiment to a locally sustained program to reduce disruption, dislocation and/or to increase the likelihood that successful innovations will be locally funded?

Non-public libraries vigorously pointed out a key failing of the existing LSTA competitive grant program as implemented in Florida. As one participant put it, the competitive

grant program is largely “a public library program masquerading as a program for all libraries.” Non-public participants uniformly objected to the way the program was administered. A common sentiment was, “Why waste our [non-public libraries] time? Either announce it for what it is, a public library program or fund non-public projects on par with public library projects.”

Many commented that the existing LSTA competitive grant application process was too cumbersome and needed to be simplified. There was general concern expressed that the process might be presenting a barrier to applying for small and rural libraries and those who could not retain a full time grant writer.

## **Role of Library Consultants**

### *Division Consultants*

The first priority in this area according to all participants was restoring travel funds for the Division’s consultants.

There was support from some larger library systems and cooperatives for moving some of the existing library consultants away from Tallahassee and into the various state regions. A possible model might be the district librarian approach in Pennsylvania (although that program was established with new money and more locally distributed, county or multi-county rather than region). One participant summarized, “Existing consultants are subject experts but not in touch with the local political situation – they go away and the good ideas languish for lack of the political savvy and the follow through necessary to move from idea to practice.” “We need more help working with local county commissioners and local legislators. The consultants views are often more respected than ours. But coming from Tallahassee, they can’t always be there.” These “regional librarians” would serve as a bridge between external partners and the local setting, their horizon would be larger than the local library managers.

The notion of regional consultants came under fire particularly at the FLA meetings. A key objection was the unevenness of service delivery that might result. “What if the consultant sited in a region was no good? With the present system we can work around this by freely going to another consultant.” “What if we needed specialized advice? A regional consultant would add another layer of bureaucracy before we got to the person with the answer. If the specialist was also regionally based, he might be too focused on how things work in his region not able to believe that things work differently in other parts of the state...or be in touch with how things work in Tallahassee.” Some thought that their regional cooperative already had enough staff with similar duties. Many felt the addition of regional consultants should only be done with new state funding, if done at all.

That said, there was a strong voice for continuing the type of consulting services already offered to medium, small sized and rural libraries by the Division. There was ready evidence of the success of the existing consultant arrangements in this area including a number of testimonials. In particular, consultants play critical roles in educating and “gently persuading” elected officials in small communities to favor libraries in their deliberations. Should a regional

approach be tried every effort should be made to continue the existing consultant services that work so well with rural and small libraries.

Some thought the Division needs to devote further attention to training its new consultants. There were two criticisms offered: “please don’t hire consultants without library experience [which may have been defined as public library],” and “some of those [new] consultants come in here thinking they can dictate to us and have the final say. They need to be straightened out!”

It was clear from the various discussions in which consultants were mentioned that the program is very valuable to library managers. There was unanimous gratitude and a feeling of debt for the consultants work introducing libraries to the Internet. Often it was expressed in the possessive, “my consultants said...” It was also clear however, that experienced managers had learned how to use consultants to a much fuller value than newer managers. There was concern that newer managers would not develop the same rapport and knowledge of the consultants due to their restricted travel.

### *Non-public library consultants*

There was interest in the availability of library consultants from the Division or other external partners to serve the needs of non-public libraries. Each type of library had need for this form external support that is not fully met though existing methods at present. There was special words of praise for the CCLA technology consultants.

### **Local Library Funding**

Several issues came up related to local library funding mostly related to public libraries. Public libraries raised several issues related to state aid, the need to diversify funding sources including charging of fees for enhanced services, the need for assistance to develop multi-jurisdiction funding models, and a continuing education role in this area. Several libraries, particularly community college and university libraries, complained of funds being allocated by state government (and others) for libraries never reaching the libraries. Instead, the earmarked funds were used by parent libraries for other purposes. Can external agents play any useful role in ensuring that money externally allocated for library purposes actually reach the libraries as they pass through parent administrations?

### *Role of state aid in local library funding*

There were several issues discussed related to state aid. There was widespread support for “going to the mat” this coming legislative year to obtain full funding (for the first time) for state aid. Participants believed that this objective was achievable if local support was better utilized. One private academic librarian argued strongly for increasing multi-type cooperative funding from \$200,000 to \$400,000 as originally envisioned. All small and rural library managers pointed out that obtaining state aid meant survival of the library for another year. None were happy with making one-third of the state aid allocation (the “non-recurring” portion) “up for grabs” each year.

Indeed, several public library managers expressed the need to make state aid allocations more:

- **“Explainable:”** particularly to county commissioners,
- **“Predictable:”** Participants noted the difficulty of predicting current funding using data from two years back (particularly with the non-recurring so uncertain), and,
- **“Cushioned:”** “...If you are going to take state aid away from a library [i.e., the non-recurring for one year], do so more gradually so the impact is not as devastating.”

The clear message was the present approach was making planning and budgeting for library services at the local level very difficult. This was particularly true for small and rural library managers where state aid was needed to survive – there are few other funding sources available.

### *Diversifying revenue sources*

All libraries are looking at ways to diversify their sources of revenue both to increase it as well as partially insulate and cushion a downturn from any one revenue source. Many believe the Division should seek the issuance of a library specialty tag. Many were looking at various local taxing arrangements with resulting revenue actually and specifically going to the library (as opposed to being lumped in a general pool, and thus never seen by the library). Many communities are considering impact fees on new construction and libraries are actively seeking to obtain their share of these funds. Many communities have already “maxed out” their ad valorem taxing authority. Thus, any assistance in this area by external partners would be of interest.

One key area of ongoing contention, reported by participants, is the ability to charge for certain library services within the context of the definition of “free library service” by state law and administrative regulation.<sup>39</sup> No one suggested that free services go away or be limited. Some libraries however wish to give their users the option of paying for enhanced services (e.g., speedier document delivery or document delivery to the home) with revenue generated (if large enough) subsidizing additional free services for all. Some want to charge modest fees for library cards (and believe the Division should charge for a state library card). Some libraries were looking at a range of creative ways to increase revenue particularly for enhanced services, those “labor or time intensive” services offered by libraries. Clarification by the Division of what constitutes “free library service” and what services may have fees attached without loss of state aid would be helpful. Perhaps an approach similar to the Hawaii State library, distinguishing between core (free) and enhanced (fee) services<sup>40</sup> might be useful.

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<sup>39</sup> The legislature is presently considering a modification to this definition (see HB1115 & SB2114) that would extend free library service to all residents within the library’s county. From SB 2114 2 (c) Give the same free library service provided to its own all residents to residents of all political subdivisions within the county that receive operating grants from the state.

<sup>40</sup> For a summary of the enhanced services see: <<http://www.hcc.hawaii.edu/hspls/fees.html>>

### ***Local funding across traditional jurisdictions***

Some participants pointed out that Florida has a number of “joint-use” libraries (e.g., public library and community college joint library) as well as several counties who are considering building library facilities to be used and funded by residents of these several counties. There was discussion at several meetings of keeping school libraries open after school, at night, and on weekends. Some of these joint use libraries would welcome advice on the best ways to fund these operations. In some cases an external catalyst/broker role may be needed to bring the parties together and broker a reasonable deal bringing in external examples used elsewhere where appropriate. In other cases, there are liability insurance issues that would require state level changes in regulations or funding to pay liability costs.

### ***Need for public library funding options continuing education***

There appeared to be general interest at the public library director level in exploring, perhaps at a conference:

- Alternative mechanisms of local funding/governance, their benefits and disadvantages;
- Clarifying the issue of free v. fee, and
- Systematically examining other sources of local, state, and federal funding.

The intent would be to ensure that all directors were knowledgeable about the full range of local funding options and their strengths and weaknesses. The Division sponsored a similar workshop at its 1997 Public Library Directors Conference on "Local Government: Major Revenue Sources." Perhaps there has been enough change of administrations that a similar conference would be useful. External partners would also need to offer follow up support to assist those localities that wished to pursue some of the approaches presented at such a conference in their local communities. Finally, some sort of manual and instructional module should be prepared summarizing in detail the local funding options so that new library directors would have ready access to this information.

### **Impact of the Diversification of State-wide and Division Funding**

The past five years have seen an important increase in state level partners (and national level partners that may or may not work closely with the Division) that provide libraries throughout the state with additional funding and resources. Examples in addition to IMLS LSTA funding include the Schools and Libraries Division e-rate program on the federal level and the private Gates Family Foundation.

Some believed it may be appropriate for a public discussion and agreement among the stakeholders as to how these funds are used. A principal outcome may be simply educational – as use of the funds may be determined external to state or local control. Issues raised at the regional meetings include. When should LSTA funds be used? When should state aid be used – for statewide initiatives, for aid to local libraries or for cooperatives? Are there better ways to structure the transition from an externally funded innovation or experiment to a locally sustained

program to reduce disruption, dislocation and/or to increase the likelihood that successful innovations will be locally funded?

Are there better ways at the state government level to manage these programs through formal or informal working arrangements? Can state level agencies (perhaps with the assistance of the multitype cooperatives) better manager these programs or reduce the paperwork burden at the local library level?

### **Funding Statewide Resources & Services**

Concerns were raised that the advent of the statewide virtual library and library card raises a question of who will pay for statewide services (as distinguished from local library services) and how. Clearly, this issue will come to a head in the next five years. The issue specifically relates to the previous discussion of defining what constitutes “free library service.” Will the statewide virtual library come to define “free library service” with local services fee based – or vice versa – or some mixture? Will Florida follow the path successfully pursued by other states of initially funding the statewide effort using LSTA funds with state government picking up the effort once the efficiency and effectiveness of this new approach becomes apparent to elected official and taxpayer alike?

### **Standard Setting**

#### *Range of types of standards needed*

Regional meeting participants discussed several different<sup>41</sup> types of standards including:

- Minimum and accreditation standards,
- Persuasive standards,
- Library management standards and best practices, and,
- Other state/national/(international) standards.

Study participant comments are summarized separately under each type of standard.

#### *Minimum and accreditation standards*

Some participants stated that the Division issues minimum standards that force public library<sup>42</sup> compliance by law, regulation or reduction of state aid. An example might be number of hours of service per week. There are also other minimum standards such as ADA requirements, building codes, and safety standards. Small public libraries, in particular, found this type of standards useful to get county commissioners to meet minimum library requirements. There was discussion of further development of level of service standards (including information technology, staff training, public education, literacy programs, etc.) as a way of insuring that

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<sup>41</sup> Note, these are not exclusive categories. For example, hours of service per week, might appear in each category. Standards are alternately loosely defined or pragmatically defined here. Standards may include law, regulation, certain statistics, certain parts of statewide purchasing and licensing, best practices, etc.

<sup>42</sup> Public library and not other types of libraries.

certain services were present at every library. Also mentioned were requirements for public education, staff continuing education, average age of collection.

Several public library managers suggested the need for identifying the range of minimum standards currently in effect and collecting them in one (web-based) place. One library manager noted that minimum standards could be hurtful to public libraries when county commissioners, in a budget crunch, lower funding to the lowest amount necessary to meet Division minimum standards. Accreditation standards for school media centers and post secondary libraries, usually national, play a similar role to minimum standards. It is unclear what other state agencies issue minimum standards affecting libraries.

### *Persuasive Standards*

Persuasive standards were variously describes as citizen, taxpayer, elected official based standards or customer satisfaction or expectation of service standards. As a class, persuasive standards enable library administrators to persuade local governing boards and voters to improve library support and services. When annual budgets are reviewed competing local government agencies or administrative units all have such standards that they use effectively in making their funding case – libraries often don't. Customer standards are directed toward local funders of libraries, in their language, with their needs for information in mind, with the intent of persuading them to increase library funding. These standards represent a strong move away from "library centric" standards<sup>43</sup> to standards that are intelligible to and that matter to elected officials and taxpayers. These standards are framed to address the questions local elected officials will ask in order to decide among competing priorities. These standards are addressed to taxpayers so they can understand when voting or lobbying elected officials. Participants suggested that a beginning list of such standards might include:

- Convenience of location (farthest distance from library to citizen);
- Convenience of hours (# of hours, # hours on evenings weekends);
- Collection diversity (collection size per capita);
- Digital collection diversity (# of databases, services);
- Workstations per thousand, Computer labs per 5000;
- Electronic reference response time;
- Professional (not necessarily MLS) staff per capita; and
- Salary.

These standards were of greatest interest to regional meeting participants. These standards must be supported by a set of specific actions and costs to be effective. Library managers need to be able to accurately outline what it would take for a library to raise the bar to the next appropriate level (fund this, add that many staff, etc.) that the elected officials and taxpayers want the library to achieve.

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<sup>43</sup> See for example, fill rates. For further discussion of these types of standards, see library management standards above.

A related set of standards, described as competing units of government (or organization) standards, show the library unit as favorably meeting some standard particularly when compared to another unit within the larger organization. Perhaps the most powerful tool many public libraries have when seeking funds locally, is the annual survey of local government services. Public libraries regularly place at the top of the government services being evaluated.

### ***Library management standards and best practices***

These are standards and best practices developed from various sources, generally by librarians and for librarians. The intent is to enable library managers to run their shops better or to rapidly adopt a good idea that worked elsewhere. Library management standards are not intended to convince external funders to maintain or increase funding. An example might be the ratio of catalog to Internet public workstations.

Study participants identified three areas where external support might improve the use of library management standards and best practices. First, establish a single (web based) place where the various library management standards and best practices could be collected and organized so as to be easily found by Florida library managers. Second, identify Florida library managers needs for management standards and develop them via quick surveys of current practice.<sup>44</sup> Specific areas in which standards are or would be useful include: space utilization, balancing collection development among various media types, level of cataloging standards, and equipment purchase guidance. Third, evaluate experiments and innovation (funded by LSTA, for example) differently from diffusion projects. The emphasis should be on providing the next managers to implement the project with as much assistance as possible to rapidly adopt the innovation. External funders may find that innovators cannot provide the evaluative data subsequent implementers need. Should this be the case, external funders should be prepared to outsource the evaluation.

### ***Other State/National/(International) standards***

There are state and national standards for which local libraries are required to supply data. Ideally, these standards also are minimum, customer or library management, standards as well. But that is not always the case. Several made the perennial request for a review of the existing standards and the data collected to define them so as to reduce local data collection workload.

Several participants noted that other state libraries and national organizations develop useful standards that might be applied in Florida. Several participants expressed the need for someone at the Division to regularly and systematically identify these standards and collect and organize them in one (web-based) site.

### ***Areas of agreement on standard setting***

There was general support for library standard setting under certain conditions including:

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<sup>44</sup> One of the best models being Keith Lance's *Fast Fact Surveys* for the Colorado State Library, Library Research Service (<http://www.lrs.org/>).



- **Consensual:** To be effective, these standards have to meet the needs of a diverse range of Florida libraries. They cannot be imposed, because they can be ignored. All need to view the new standards as designed by library administrators, endorsed by the Division, as tools for use by local library administrators to obtain improved local funding or, secondarily, to better manage.
- **Coordinated:** There are a number of external partners with standard setting roles including the Division, FLA, other state government agencies with responsibilities for libraries, advisory boards, and cooperative managers. There is a need to bring these stakeholders together to coordinate standard setting activities.
- **Type of standard:** The first priority for many was the development of standards for external persuasion (of governing boards) and then minimum standards where necessary. There was less general interest in library management and externally developed standards.
- **Level or tiers of service:** All standards should be tiered to address the diversity of library situations in the state. The issues here are the range of libraries: urban, rural, rich, poor, etc. Standards that are too high will be “treated like a joke” by elected officials. Ideally the library administrator could present data that places the library at a midpoint in a range.
- **Authority:** There was a clear hierarchy of authority depending on who issued the standard with what consequence. A Division minimum standard expressed as a customer standard (e.g. hours of service) carried the greatest weight because it was issued by a government agency to a government agency and had clear consequences. A Division *recommended* standard also was important because of the government to government connection. Standards issued by others (e.g., FLA) must derive their authority for reasons other than who issued them. For example, authority might ascribed to a standard because it enables the ability to match a library to its peers or because there is a strong local desire to achieve a certain outcome. It was clear that standards that were issued by the Division (however developed) would carry the greatest weight with local funders.
- **“Be current & use good data:”** Standards get old quickly (although some still may occasionally refer to the 1985 standard!), locally collected data (includes the southeast) may be better than national standards, although national standards carry their own weight.
- **Avoid unfunded mandates:** Sometimes the difference between persuasive tool and unfunded mandate is slight or varies from one context to the next. Unfunded mandates should be avoided.
- **Solicit feedback, act on it promptly:** Developing standards are not enough. There is need for an active program to assess the impact of standards and adjust or eliminate those that have unintended or negative consequences.

There appeared to be strong interest for Division involvement in the development of such standards/benchmarks/best practices/levels of service. This discussion took place primarily among public library managers, however.

### **Planning & Evaluation**

Priority areas specifically mentioned during these regional discussions include:

- **Finish the economic value of public libraries study:** Many library managers and at every location agreed that there was a continuing need for a study that showed the economic impact of Florida public libraries and benefits to key stakeholders including elected officials, taxpayers, corporations and developers.<sup>45</sup> One influential voice suggested that to be effective the study should be done by a recognized, disinterested, authority (someone the governor and legislature would respect) like a big 6 accounting firm.
- **Manual/workshop on “making the case:”** “It used to be we tried to tell our story. Now days that isn’t enough. We need to make our case. ...and we need help in doing it better.” Part of what participants had in mind was help with deciding what data to collect (including net measures), how to collect and analyze it. But the emphasis was clearly on assembling the data into an effective case for persuading local government, taxpayers, corporations and other local funders to support the library and its programs.
- **Testimonial collection & use:** There was general recognition of the power of testimonials in persuading elected officials. Several participants suggested the need for a formal, statewide, system for collecting this data for use by library managers, Friends, and the Division (as well as others) to persuade elected officials and potential funders to further support libraries. Envisioned was a once or twice yearly short report from library managers containing testimonials and newspaper clippings (and other media) etc. sent to a central source for processing by county, state and federal legislative district, and topical categories.
- **Do more with submitted technology plans:** Several noted that the Division (and SLD) required technology plans. But nothing was done with them. These plans should be analyzed and the Division should initiate joint planning and cooperative purchasing where there are shared interests/needs for technology within the state. Library managers would find it useful to know about other libraries in the state that had the same hardware or software or were contemplating purchase. Library managers would find it useful to know about unusual IT use (existing/planned). This type of data mining of IT plans could be one role of IT staff added at the Division to fill this perceived gap in staff expertise.
- **Study early adopters of virtual libraries:** Much can be learned about the issues to be faced and responses needed as the statewide virtual library is implemented by systematically assessing early adopter Florida regional cooperative and other state experiences as a guide.
- **Document delivery low/no participation study:** There may be need for a study to identify the number, type, and location of low or no document delivery transaction libraries. Are there ways of stimulating participation in the document delivery program by these libraries?
- **Developers packet:** Regional participants expressed the need for a packet of materials educating developers statewide about the importance of the library to the establishment of a community identity, to generating foot traffic for local businesses, and providing general siting requirements. A related need is for a manual/workshop for library managers on library planning in areas undgoing rapid growth (discussed below).

<sup>45</sup> See the proposal for such a study in Charles R. McClure, et. al. *Economic Benefits and Impacts from Public Libraries in the State of Florida* (Tallahassee, FL: Information Use Management and Policy Institute, Florida State University, 2001) at: <http://dlis.dos.state.fl.us/bld/finalreport/>.

- **Manual/workshop on Library security:** Library managers in many locations in the state are concerned with the security of their patrons and personnel. There is a need for a workshop/manual that leads to a local library security plan including issue identification, strategies for addressing (drawn from state, region and nationally), dealing with aggressive patrons, developing a local plan, etc.
- **Standard setting:** A range of new data may need to be collected and analyzed more frequently to provide the persuasive tools needed by local libraries.
- **Job description/salary/recruiting study:** as outlined under the staff section above.
- **Penetration of home Internet workstations:** There was one request for this helpful planning data to enable better planning of services to remote users in the community. These data are collected regularly by private companies (and older versions of the data are often available for free). It might be worthwhile to consider obtaining Florida data from a private research company for use by the Division and local libraries.
- **Understanding remote library users needs:** Experienced early adopter providers of library services consistently indicate that use among remote users is substantially higher than in-house use. Who are these users, what do they want from their libraries, and a range of other questions need systematic attention. As important as the answers, will be the methods developed to assess this significant new user population.
- **Evaluation of effectiveness of core services:** Conduct research to show the impact of library core services on pressing societal problems. The model for what participants had in mind was the LRS studies linking the presence of school media centers with a rise in student achievement.<sup>46</sup> These would be targeted studies to build public and elected official support for library services. Candidates for such focused evaluations mentioned include link between summer reading and reading achievement,<sup>47</sup> impact measures for story time and baby time and literacy activities.
- **Statewide virtual library statistics:** Participants had two hopes. There would be a mechanism devised to identify library service population use of the statewide virtual population. That the Division would use it clout with vendors to obtain data that all libraries needed in a useable form.
- **Innovation evaluation and diffusion:** At nearly every meeting, participants asked for a statewide system to:
  - Identify innovative ideas (or even examples of best practices of established services),
  - Evaluate in-state innovations in such a way as to enable a library manager at another location to rapidly adopt the innovation and,
  - Develop a mechanism to proactively link idea and evaluation with libraries that might benefit from the innovation.<sup>48</sup>

Library managers reported that they were regularly frustrated to learn, by accident, that a solution to a local problem had been found by someone else in the state.

<sup>46</sup> Colorado State Library. Library Research Service (LRS). *School library media impact studies*. <[http://www.lrs.org/html/about/school\\_studies.html](http://www.lrs.org/html/about/school_studies.html)>.

<sup>47</sup> Note summer reading programs these days include other components such as computer literacy. The effect of these other summer programs should be assessed as well.

<sup>48</sup> Mentioned here was a database of innovative ideas, funded staff exchanges so that innovation managers could travel to innovation adopters for joint planning.

There was no discussion of the value of Division publications, their continuance or need for new ones.

### **Capital Expansion & Maintenance**

The discussion in this area was limited to public library managers and supporters. Some localities in the state are undergoing extraordinary, rapid population growth. Others are replacing or adding existing facilities. Capital expansion and maintenance will need significant attention over the next five years. There did not appear to be a consensus on the role that external partners might play in this area. This because of the varying building experience of library managers and the varying type of local support already available to them in this area. There seemed to be general support for a Division facilities management consultant who would assist localities as needed in this area.

Many believe that there is clearly an opportunity to exert influence with local communities and developers in shaping the construction of future libraries in the state. In some cases, regional participants had hard won experience in library construction. This group tended to view external partner efforts as, at best, distracting. They did not want more advice! Other library managers, with less experience, would welcome any and all help. Two distinct, but related areas of need emerged: planning assistance and then construction assistance.

Library managers expressed the need for planning assistance regarding how to think about planning for library facilities in rapidly growing areas of the state. As part of the assistance in this area, library managers expressed the need for assistance in becoming a recognized player with county government decision-makers and local developers so that library needs will be routinely addressed. For example, so that when county government is laying fiber optic cable in anticipation of future growth they are routinely adding the lines that the future library branch will need. There was interest in a statewide program targeted to county and local planning offices alerting staff to the need to plan for library branches infrastructure needs.

Regional participants expressed the need for a packet of materials educating developers statewide about the importance of the library to the establishment of a community identity, to generating foot traffic for local businesses, and providing general siting requirements. Developers in other parts of the country routinely donate land and/or building in an effort to make their development more attractive to home buyers. This does not happen where developers are unaware of the public library's importance.

The second area of assistance needed related to the actual design, renovation or construction of a library facility. Many public library managers also supported the availability of sets of pre-developed floor plans for public libraries of different sizes.<sup>49</sup> There was also interest in plans for computer labs and youth service areas. In addition, there was interest in establishment of libraries in non-library spaces, for example, police stations, senior centers, malls and storefronts. Some would find various construction standards to be of use. There does not

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<sup>49</sup> An issue was what should be customized at the local level. One view was that the floor plans were remarkably alike with customization coming in external features.

appear to any formal mechanism to link library managers with construction experience in the state with those who are building a facility for the first time. Some thought there should be.

Many questioned whether the application process was the appropriate place to force the education of library managers in correct library construction practices. “The amount of money is so small, the work demanded so much, it is easier to skip the whole thing,” is the common view. Some don’t realize that the intent of the application process is to encourage good practices – to many applying involves mindlessly going through a set of hoops.

Florida has been a leader in joint use facilities, particularly facilities that serve both public library and community college users. Recently, Hialeah public library has successfully experimented with the creation of “virtual libraries” in single large rooms within new satellite city government centers. Experimentation and innovation in this area will need to continue if Florida’s libraries are to meet the demand in high growth areas over the next five years. Linking the innovative idea to the next library manager who needs to know about it is a challenge whose solution external partners should pursue over the next five years.

Several participants wondered whether other facilities could be jointly used, particularly in areas of the state experiencing explosive growth.<sup>50</sup> Most commonly mentioned was exploring the feasibility of extending the hours of some school libraries further into the afternoon, at night, on weekends, or over the summer. Apparently there are a range of liability insurance, bureaucratic hurdles, and permissions to be traversed. Plus, school libraries need to end the experience better off than if they had decided to close when school ended. What would it take? Perhaps top down encouragement from both the Division and the Department of Education might smooth the way. Perhaps an experiment or two, using LSTA funds, is warranted.

There was general interest in updates in the latest construction ideas for libraries. For example, a drive-thru window for fast library transactions (like returning books). A Division sponsored alert system in this area would be well received.

The interviewer was left with the impression that this was a big problem and about to become dramatically larger, that it had left many stunned and unable to articulate their need. Only a few recognized this problem or a need to plan for facilities to meet explosive population growth in their areas. Some thought it may be better for the Division to conduct its own needs assessment targeted to areas that Census and state studies indicate are undergoing rapid growth. Proactive study of this issue may save a great deal of headaches later.

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<sup>50</sup> Often the catalogs are already publicly available, even shared, but the collections are not. One person noted that access to the collection is often not the only incentive, libraries can also be a quiet place to work, seek assistance with homework, etc.

## Preservation & Access to Florida's History

The issue of preservation of library materials (both paper and digital) surfaced only once in a discussion with the library manager of a state government agency.<sup>51</sup> The needs in this agency library were critical, the internal resources unavailable.

The issue of providing access to Florida's rich history surfaced only once in a discussion with the library manager of a historical society collection. The picture presented was of an institution ill prepared to provide even modest access to any portion of its collection, and then only local limited access. Collections were not cataloged – so the library was unsure of what it owned. Staff was limited – so cataloging could not proceed and hours of service were limited. The lack of trained staff and equipment precluded making any portion of the collection available digitally.

The sense of some participants was that external partners seem faced with three choices:

- Accept the argument that preservation of Florida's paper and digital heritage matters despite an apparent low or no priority placed on preservation by library managers. Accept the argument that reducing the vast technical processing needs that many preserving organizations have matters despite an apparent low or no priority placed on this problem by library managers and the public. And therefore, fund whatever external partners can.
- Reject the argument that preservation of Florida's paper and digital heritage matters and agree with the apparent low or no priority placed on preservation by library managers. External partners, therefore should therefore do little or nothing to preserve Florida's heritage and instead fund more pressing priorities.
- Recognize that funding for preservation will only come if important materials are made publicly accessible in meaningful ways statewide. (Only) fund projects that makes preserved materials publicly available statewide in meaningful ways.

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<sup>51</sup> Subsequent to completing the regional meetings a library manager commented in an e-mail: "My first experience with the State Library was through people in Gainesville who are in historic preservation. Their interest is specifically in the Florida materials in the State Library. I think this role is important, and should be strengthened. There are essentially two source libraries people go to for historic and cultural material, one is a special section at the University of Florida and the other is the State Library. The Gray building where the State Library is housed contains historic preservation, the State history museum and the State library. It seems that the relationships were shown in this putting together of historic resources. Florida has an outstanding historic preservation program that is recognized by professors and the often distinguished people in Florida communities who support it. At present the State Library is digitizing its collection of Florida visual resources which is being organized to be used by teachers in Florida classrooms. This kind of activity needs more recognition.

The State Library also has archives, it houses community plans, and is a public lending library for any Florida resident. These activities are also part of its role as a central agency.

Florida depends on tourism and cultural tourists spend a lot of money. Often the necessary information for a historic survey of a local place is in the local library. Some libraries have kept collections, some have not. The State Library could be a source of information and advice in this area."

External partners in the rest of the country that have selected the third choice have met with success. Preserving organizations have saved key materials. In addition, these organizations have found ways to organize and preserve additional materials by carefully managing external partner funds.

The issue of government agency records management was touched on only briefly. The example presented suggested that the library was a low priority for those government units that even had a library. Preservation of agency documents was a still lower priority – basically it was not a priority at all. There is external interest in some historic agency documents that could not be fully met. No recommendations were offered to address the issues raised.

### **Marketing and Public Relations**

There was general agreement that statewide marketing and publicity campaigns would be needed over the next five years. Priorities identified include:

- Persuade elected officials, lobbyists and taxpayers to fund libraries;
- Increase the visibility of the library within the community;
- Improve the image of librarians and library staff in the public's mind as well as for library career and morale purposes;
- Tell the community about the services available at the library – many of the participants remarked that the public has no idea of the range of services libraries offer.
- Educate citizens, particularly immigrant populations, regarding the purpose/use of the library.

Areas mentioned include:

- **Virtual library campaign:** a promotional campaign advertising the virtual library services will be needed.
- **Use the virtual library to advertise:** The feasibility and desirability of using the virtual library to promote library and related products should be investigated.
- **“Big stars” use the library campaign:** Mentioned were Florida residents such as Tiger Woods.
- **Immigrant and non-English speaking communities:** Making them feel welcome at the library and acquainting them with library services.
- **IT training @ the library:** Mount a campaign to position the library in the public's mind as the place to go to learn about new information technologies.
- **Target corporations:** Develop, market and publicize an effective explanation for why supporting libraries benefit corporations.
- **Focus on TV & statewide radio PSAs:** Expense is too great for local libraries.
- **Include all libraries:** Division should explore arrangements so that school and other libraries can obtain national library campaign promotional material at a reduced rate.
- **Use results of local citizen satisfaction surveys:** a good way to illustrate libraries high support.

A consistent theme at the meetings was that the Division needs to devote more attention to getting the word out about what it does of interest to state agencies and local governments, taxpayers and library managers.

### **Seeking Partnerships with Commercial Companies**

The question was usually phrased this way, “Is there a role for an external partner to actively go out and seek the next Gates Family Foundation support for libraries?” But it also became apparent that there was need for advice on how to seek support from local businesses as well. Suggestions for external activities include:

- Consider a development officer at the Division. Such position would be welcome particularly if the focus was on bringing in new or out-of-state funding. These efforts must not be in conflict with regional or local efforts to obtain funding from in-state corporations.
- Potential state wide companies to investigate partnering with for the benefit of libraries throughout the state include: book store chains, video rental shops, newspapers, radio, television, computer, telephone and cable companies.
- Develop a manual or instructional module that assist local library managers in partnering with local businesses. Cover such topics as: who to approach, how and why, how to make the case for the benefit of business partnerships to business people, examples of successful library-business partnerships, assessing hidden costs and assessing when a partnership is, in fact, a net win for the library.
- Explore, at state and local government levels, ways to reward corporate partnerships with libraries. Mentioned were partial tax exemptions for corporate gifts as an example.
- Give greater attention to assisting local libraries in setting up vehicles for corporate giving that are both flexible and easy. Attention may be needed to assist libraries, Friends and library foundations in better managing corporate gifts.
- Develop, market and publicize an effective explanation for why supporting libraries benefit corporations.

There was general agreement that attention to this area would “sell” in Tallahassee.

### **Seeking Partnerships with Government Agencies**

When this notion was raised in the regional conversations, it generally elicited a pause in the conversation. Many of those interviewed thought the biggest need for this type of activity was between the Division and the Department of Education. There was the appearance that both agencies “got along” but did not do much substantive joint planning and coordination. Public and school librarians both indicated that some direction needed to “come from the top” in order to enable or even permit local public library-school library partnering. Indeed, a number of school and public library managers interviewed commented, “we need *permission* to have any joint school – public library activity – a mandate, with guidance, from the top would help.” Specific focus areas mentioned included sharing of curricular materials and reading lists, joint planning of activities where appropriate, coordination of school and library reading efforts – particularly related to linking school reading activities to summer reading programs.



Encouragement from the top to get schools and public libraries to interact was both needed and desirable.

Other agencies in which possible partnerships should be considered that were mentioned include:

- Health Department
- Department of Economic Development
- Tourism Department
- Department of Transportation
- Enterprise Florida
- Workforce Development
- Commerce Boards
- K20 program
- State Technology Office
- Department of Elder Affairs
- Florida Association of Counties
- Various bilingual education units

The basic role would be for the Division to seek out and arrange opportunities for library-agency partnerships available throughout the state.

The only other more general comment made was that efforts in this area might be limited for fear that the library component might be swallowed up by a larger agencies initiative. No mention was made of existing partnerships with other state and federal agencies common to many libraries throughout the state.

There was a great deal of interest in figuring out ways that libraries could be of more use to local governments. Many library managers had seen the payoff in this activity in providing support to local government in computer, telecommunications and Internet introduction. Many library managers said that their local governments had little idea what the Division did and how it could be of assistance to them. There was also a good deal of interest in learning of successful local government partnerships developed by libraries in other parts of the state.

### **Seeking Partnerships with Non Profit Organizations**

Some participants noted that a number of libraries, often by default, have carved out an additional role for themselves as community center, community anchor or cultural heart in some parts of the state. In some cases, their informational role is secondary. In almost every case, the library is important as a physical place important in the fabric of the community. Sometimes libraries provide one of the few sources of cultural programming available to the community. These roles demands close cooperation and partnerships with other community agencies and non-profit organizations. In some cases, there is need for an external partner to explore joint library-non profit partnerships with state and national level organizations. In addition, there is need for a mechanism that identifies successful local partnerships and then disseminates the

details to other libraries throughout the state so similar successful programs can be implemented elsewhere.

### **Role of Multitype Cooperatives**

One person commented that “there are six regional cooperatives. They represent six different flavors of involvement with their members.” Issues raised include:

- **Non-members:** Several participants in all areas of the state commented that cooperative membership fees were high.<sup>52</sup> “They are pricing themselves out of the market.” Membership fees are high enough in some cooperatives that some libraries were no longer cooperative members, or had a basic membership but could not take advantage of all the needed services being offered, or had seriously contemplated dropping their membership. As a result, not all libraries are members the regional cooperative in their geographic area. Further, this trend was likely to increase over the next five years. In general, non-members were the smaller libraries, school libraries, and special libraries at present. Several noted the resulting vicious cycle: the cooperative is a member driven organization, if classes of libraries are not members, services of interest to those types of libraries will be reduced or eliminated, further reducing incentive to join the cooperative. A key question needing attention over the next five years is who will supply services to these non-member libraries or can the pricing/service structure be adjusted to allow more flexible participation? Should cooperatives be required to find a mechanism to include every library in its region in the cooperative in order to receive state aid? Should libraries be required to be cooperative members in order to receive state aid – should they be allowed to join cooperatives out of region?
- **Continuing education:** There was no uniform role for cooperatives in this area. Some cooperative managers see continuing education as their central focus over the next five years. Other cooperative managers see continuing education as one of several key areas needing attention in their area. It would be a mistake to believe that every cooperative believes that continuing education to be its principal activity.
- **Minority views?** The majority of the participants praised their regional cooperative’s activities. But several participants asked, often in private, whether Florida needs cooperatives at all? “Why have we created so many layers for ourselves, each dipping into the funding pot? Perhaps the Division needs to look at ways to streamline this segment of our structure?”
- **Statewide service entrepreneur and prototyper:** Some cooperatives have defined a their role to be prototyper of future statewide services or entrepreneurial provider of services to the entire state. Historically, Florida’s cooperatives have played a key role in perfecting an innovation before it is introduced statewide. Participants agreed that this useful role should continue. Cooperatives have successfully taken on the statewide provision of needed library services, for example, document delivery. Participants agreed that this useful role should also continue.

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<sup>52</sup> To be clear, the issue did not appear to be was the cost of membership being charged by the cooperative excessive or not justified. Rather, either the cost was simply too high for the library to afford, or a member did not have the option of picking an choosing which services to use, or the not enough of services offered were needed enough to justify the cost.

- **Relationship to the Division and each other:** Several suggested a need to re-structure the relationship between the Division and the cooperatives and among the cooperatives themselves without a great deal of specificity.

Cooperatives have brought significant benefit to the state's libraries. However cooperatives do not guarantee equity of services among libraries within their service area or equity of library services across the state. Indeed, differentiation among regional cooperatives may become more extreme over the next five years and the number of non cooperative members may increase as well.

### **Role of Community College Libraries**

Many participants believe that community college libraries have one of the most successful virtual libraries available in the state and can serve as a model and resource for the statewide virtual library. In addition to a shared catalog, licensed databases, and centralized information technology, IT training and consulting services, and software development are offered. The community college virtual library has suffered recent sizable budget cuts threatening the quality of the services offered however. One person thought this was particularly unfortunate as community college libraries are far more dependent on information technology and digital resources than many other library types. Thus a loss of access to digital resources has a much more direct impact.

The partnerships between community college libraries, public libraries, and college libraries that share resources and facilities are among the most innovative anywhere. These projects are closely watched by the library community beyond Florida as exemplars for the future. Further assessment and study by Florida libraries and the Division of these partnerships may be warranted so that the hard won knowledge gained from these projects is better distributed throughout the state. Similar partnerships are likely to be the norm over the next five years in Florida and beyond.

Community college library managers stressed the number of issues they had in common with other library types. They stressed the need for speaking with one voice when advocating for libraries with elected officials. A key opportunity to develop a shared legislative agenda comes during annual regional meeting held in five locations throughout the state in the fall. These meetings would also provide an opportunity to develop shared activities with community colleges and other library types.

Community college library managers expressed interest in participating in continuing education activities (particularly those devoted to non-IT related library operations and skills), cooperative purchasing, and in receiving assistance to meet accreditation standards, particularly in non-IT related areas. Community college library managers, like other non public library managers, would like greater access to LSTA funds.

## **Role of College & University Libraries**

The Study Team had less direct contact with college and university library managers than with other library types. As a result, there is less to report in this area.

Academic library managers had an active interest in two areas: the development of the virtual library and how it would impact their existing virtual library programs and increasing funding to multitype cooperatives. There were two principal areas touched on related to the virtual library effort. First, was the need to coordinate the activities of external partners related to the licensing of databases so as to avoid duplication and maximize cost efficiencies. Second, was a mixed message regarding participation in reciprocal borrowing and use agreements as part of the statewide library card. All libraries were concerned that their facilities and services would be overwhelmed with demand from non-primary clientele in an environment where their existing resources were already stressed. Some were willing to be educated regarding the benefits of participation, some would be willing to negotiate a new arrangement in which non-college/university users could have access to college facilities and resources, some did and were willing to continue to serve non-college/university users within existing policy guidelines, and some wanted no change and little external access to campus library resources and services.

## **Role of School Media Centers**

There is hope, some thought, that Florida schools and communities will rediscover over the next five years what other localities around the country have recently rediscovered: the central importance of a well equipped and staffed media center. Until then, the picture may remain one in which media centers, where they exist, must rely almost completely on the resources and decisions of the local school district or individual school. The insularity this situation creates is often further complicated by a heavily rule bound work environment, where “permission is required for nearly everything.” And, further compounded by the benign neglect of the state Department of Education.<sup>53</sup> For external partners, anticipate the need to take the first steps and endure the bureaucratic smoke screen before the real work can begin when partnering with school media centers. The reward is access to a critically important user population, school children.

## **Role of Florida’s Library Schools**

Many in the Florida library community view Florida library schools as the logical place to center continuing education and placement efforts for their staff. What follows is a discussion of five recurring areas where regional meeting participants thought library schools has a role to play:

- Suggested curricular shifts in emphasis,
- Increasing the feasibility of obtaining the M.L.S. degree on the job,
- Continuing education
- Middle and senior manager leadership education and,

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<sup>53</sup> One person commented: “The only bright spot is the near heroic effort, largely unheralded outside of the school media community, of the few staff with school media responsibility in that agency.”

- Recruitment/placement.

The expectations of the Florida library community are not likely to be met over the next five year period however.

### *Suggested curricular shifts in emphasis*

The following needs for better trained, entering, library personnel surfaced as byproducts of the regional meetings that may be of interest in future curricular planning:

- The demand for M.L.S. educated librarians exceeds demand in many parts of the state.
- Library personnel managers are now regularly hiring teachers (in some cases over M.L.S. graduates) because of a shift in emphasis in reference and public service positions. Teaching and good people skills have become more important than question answering skills at a number of locations.
- The need for technologically savvy, people oriented, librarians remains high. The technologically oriented must be comfortable with server level technology and telecommunications and also be a competent financial manager.
- Multilingual skills are an asset throughout Florida, in some cases being more important than degree or other specialization. Bottom line, some library users (and the numbers are significant and increasing) will not be comfortable until library personnel look, act, and speak like they do.
- Personnel managers cannot find enough children's and young adult librarians.

Further systematic assessment of Florida libraries personnel needs might identify additional needed curricular shifts.

### *Potential library school role in obtaining the M.L.S. degree on the job*

The next five years should give everyone a better sense of the value of various M.L.S. degree granting distance education initiatives recently begun or contemplated. There is general agreement that there is a need for a library school located in the Miami-Dade area. FSU is about to start a satellite program in the area to partially address the need. But everyone, including FSU, believes the better solution is a library school as part of one of the area universities. Not much specific discussion was devoted to ways of improving existing efforts to provide on the job access to completing the M.L.S. degree other than that the demand was there.

### *Potential library school role in continuing education*

Below are areas of need identified by library managers at the regional meetings with brief discussions of library school constraints as described by library school deans and faculty:

- **Provide focused workshops and presentations throughout the state on current practitioner challenges:** It is not accidental that the unit of instruction at library schools is the course rather than the class/workshop/presentation. Florida faculty have no current incentives to teach anything other than courses. Absent internal incentives honoraria have

to be very high to teach a workshop or the faculty member very dedicated. Travel to several locations adds to the burden and no matter how many places a workshop is offered it is not close enough for some. In addition, both library schools must work with continuing education units that add to the workshop overhead. The bottom line appears to be: expect little change or decline in the number of continuing education workshops offered by Florida library schools.

- **Provide digital substitutes/companions to focused workshops:** If face-to-face workshops are not realistic, can distance education substitutes or companions be offered? Some of the same economies and lack of incentives outlined above apply. Plus, the idea is somewhat new and its worth not proven.<sup>54</sup> Bottom line: an external partner would have to fund such an innovation. On the plus side, the source of instruction need not be in Florida.
- **Provide continuing education officer:** This person need not be a faculty member but should report to the Dean. The role would be to identify topics, presenters (who may not be faculty members) and manage the logistics, publicity and finance. These positions have been successful in other state universities, the University of Texas, Austin was mentioned by one participant.<sup>55</sup> These positions have existed at the Florida library schools but not always sustained as internal priorities/needs shift. It is unclear if an externally funded position (say by the Division) on a proof of concept or more permanent basis could be justified or effective or afforded.
- **Develop and plan a systematic continuing education curriculum:** to be largely implemented by others. If Florida's library schools cannot deliver an effective, statewide, continuing education program, can they assist others in doing so? Some believe the expertise exists among library educators to systematically assess statewide continuing education needs, opportunities and resources and devise a continuing education plan within identified constraints to be largely carried out by others. Both the assumption and interest of the library schools are untested.
- **Faculty advisors to presenters of workshops:** Some expressed the need for advice from library faculty on workshop design, content, presentation skills and on the broader aspects of the specific problems being addressed. This form of advising occurs informally now. It is unclear how to formalize these efforts or the extent of the interest on the part of faculty or workshop presenters.
- **Learn from how other library schools, in other states address the issues:** Library schools in other states are taking a range of different approaches than Florida's may take.<sup>56</sup>

<sup>54</sup> For digital programs in other states see: University of Michigan, Office of Academic Outreach. <<http://www.si.umich.edu/outreach/>> along with the University of North Carolina. Continuing education. <[http://ils.unc.edu/ils/continuing\\_ed/](http://ils.unc.edu/ils/continuing_ed/)>. North Carolina is doing a joint program with the University of Toronto and the University of South Carolina that may be of interest.

<sup>55</sup> See also for example: University of Michigan. Office of Academic Outreach. <<http://www.si.umich.edu/outreach/>>.

<sup>56</sup> See for example: University of Michigan. Office of Academic Outreach. <<http://www.si.umich.edu/outreach/>>; University of Wisconsin, Madison. Continuing education. <<http://polyglot.lss.wisc.edu/slis/academic/ces/index.html>>; Simmons College. Continuing Education. <<http://www.simmons.edu/gslis/ce/index.html>>; Rutgers University. Professional Development Studies. <<http://scils.rutgers.edu/programs/pds/>>; Drexel University. Continuing professional education. <<http://www.cis.drexel.edu/grad/cpe/index.asp>>; University of Maryland. Continuing education. <<http://www.clis.umd.edu/ce/>>; University of South Carolina Columbia.

Given the demands and issues currently affecting library education programs in the state, library managers may need to look elsewhere to meet their continuing education needs.

### *Middle and senior manager leadership education*

One area where there may be strong interest in a program or certificate, rather than a couple hour workshop relates to the training of middle and senior managers. Most M.L.S. programs are geared toward training entry level professionals. Managers have learned needed skills and world view on the job. The next five years will see a wave of retirements at the senior level and a wave of library building that will require middle manager staffing. The job of middle manager may have become too complex to hope that necessary training (and mentoring) will occur informally. There was widespread interest in systematically educating middle and senior managers for their future roles. There may be a role for library schools here, if they are interested.

### *Role of library schools in recruitment/placement*

Below are areas of need identified by library managers at the regional meetings with brief discussions of library school constraints as described by library school deans and faculty:

- **Creation of a placement center and services that serve all of Florida's library personnel:** Library managers, faced with a crisis in hiring at every level, see the need to formalize and streamline the placement process in a one stop shop operation. Library employers would have a central place to advertise open positions and potential employees would have one certain place to seek employment throughout the state. Two models mentioned were the University of Texas, Austin and the University of Illinois, Champaign-Urbana library schools' placement offices.
- **Internships for library school students:** Several mentioned the need for increased internships placing library school students in Florida libraries. This may represent a disconnect between perception and reality as active internship and fieldwork programs exist already at both Florida library schools. The graduate intern program<sup>57</sup> available in certain areas of the state seems to have been a success. Extending this program to other parts of the state, in particular to rural areas should be actively considered.
- **Clarification of the situation for county commissioners and others:** There is a need for a clear and unambiguous statement about the employment opportunities, and specifically salary, available to graduate students entering library and information studies programs in Florida today. A brief statement is needed that can be used by library managers as evidence when negotiating with governing boards over what salary to offer for new entry level positions. County commissioners are not clear that someone with library skills need not work in a library, and given current Florida librarian salaries is likely not to want to work in Florida libraries. County commissioners are not clear about

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Panning for gold. <<http://www.libsci.sc.edu/CE/Pangold.htm>>; University of Washington. Continuing education and certificate programs. <<http://www.ischool.washington.edu/professional/>>.

<sup>57</sup> One example is funded by the Broward Public Library Foundation offers a paid job at the library, and a scholarship to complete the degree. The target is Library I positions where there is a staff shortage.

the salaries new M.L.S. graduates seeking library jobs can get, particularly outside Florida. A clear statement of the present realities would help improve the salaries paid to all library personnel.

The interest or ability of the library schools to play any additional recruitment/placement role was unclear.

### **Role of the Florida Library Association**

The Florida Library Association has a unique challenge among the external partners supporting library development. FLA is the one existing external partner that has the mandate to speak for all Florida libraries and foster cross-library collaboration. Implied in that mandate is that an FLA process is in place to develop the required consensus. Developing this consensus has proved difficult without the ability to compel participation and issue resolution by all the key stakeholders. This difficulty combined with the fragmented authority structure for libraries in state government have created many missed opportunities.

Participant comments regarding possible improvements to FLA included:

- It is past time for FLA to hire paid lobbyists the way the Florida Association of Community Colleges and other associations do.
- Encourage reduced rates for joint memberships in parallel library associations. Encourage these parallel associations to have programs and meetings at FLA events.
- Move to a paid Executive Director and staff.

Note, the interviewer did not specifically ask about FLA's future role. These comments were offered in discussions on other topics and were not pursued.

### **Role of the Library Friends**

Public libraries in certain parts of the state have long benefited from Library Friends groups. Library Friends add at least three helpful dimensions to local public libraries:

- **Welcoming:** Friends do the small things that quickly add up to the big thing of creating a welcoming place and feeling for library users. Libraries are having a tough time recruiting staff, particularly at the professional level, who mirror community racial, language, cultural and language backgrounds. New Friends, recruited from the community, could partially fill the gap until staff education and recruiting efforts catch up (as well as afterwards).
- **A new source of revenue:** Friends fundraising efforts often makes the difference between an adequate program and a good or great one; and,
- **Advocacy for libraries on a local and state level:** Friends often do the lobbying that library personnel can't or don't do for themselves.

Every library in the state has benefited from Library Friends lobbying activities.



The all too limited discussions the Study Team had with Library Friends at the regional meetings focused on strengthening the Friends in several areas:

- **Recruit the next generation of members:** Many of the present generation of Friends are well in to their retirement and thinking of quitting. The community that has grown up around them is of a different composition in many respects. The turnover among Friends groups is often high in any case. The challenge over the next five years is to attract the next generation of Friends to the library with new ideas and fresh enthusiasm.
- **Establish a statewide computerized membership database:** The Friends' membership list is used for a variety of purposes. Perhaps most critical, the database is used to identify the number of library supporters and mobilize them for lobbying activities. This database should also contain library personnel and volunteers to fully reflect the number of library supporters. Turnover among the Friends is fairly high so constant updating is necessary. Putting this critical asset on a firm footing is essential.
- **Start Friends groups in libraries where none are present:** A stranger can often determine whether a library has an active Friends group without asking anyone the differences are so obvious.
- **Move the Friends lobbying effort to the next level:** See the comments under the advocacy and lobbying section below.
- **Non-public libraries:** often do not have Friends groups. Some thought there is a clear need to identify and mobilize non-public library supporters if these libraries care about continuing to receive state (and federal support for their operations)...or wish to get on the radar of state elected officials for state support.

A few participants thought that there may be a need for designating someone at the Division level to provide statewide coordination and support for some of these activities.

### **Equity**

One of the themes that emerge from discussions across the state and across library types in diverse areas is the significant and important role that state agency external partners play in ensuring, or at least addressing, equity of library services. Local libraries, cooperatives, private funders, and other important partners may not have equity as their primary objective. Yet there was general agreement that someone must. The consensus among those who raised the topic was to remind state government agencies with responsibility for libraries that as they develop their strategic plans to be mindful of their unique, among external partner, obligation and opportunity in ensuring statewide equity of library services.

### **Advocacy & Lobbying**

The regional meeting participant's comments suggest that the Florida libraries have a fairly well developed and effective *reactive* lobbying effort in place. There is a need to raise this lobbying effort to the next level and this will include developing a *proactive* stance to shape governor, administration and legislature actions rather than react to them. To move statewide lobbying and advocacy efforts to the next level will take focused action in several key areas including:

- Raising the visibility of leadership on statewide issues;
- Addressing directly the consequences of a fragmented, state level, library administrative structure; and,
- Establishing a proactive lobbying system;

For the lobbying effort to increase in effectiveness over the next five years, the leadership must visibly speak, with one voice, and be strongly supported by persuasive evidence and key local support.

### *Leadership on Statewide Issues*

The activities of the state library, FLA, individual library leaders, and others in the state are not widely known. As a result, efforts to affect statewide issues is often considered ineffective, indifferent or uncaring by local library managers and library supporters alike. State level library leaders may need to make their positions and activities more visible. In particular, it is important to show cooperation among state units that administer different types of libraries. Further, in some cases it may mean visibly fighting the good fight even when such an effort will not persuade the governor or legislature to change their point of view. There is clearly the need to balance (at least) two distinct political styles present in the state: quietly working the “back room,” “good old boy (and girl) network” on the one hand and the assertive, public position taking, using a direct, rational argument based, style on the other. Regional meeting participants seemed to be saying they may not have seen enough of the latter and do not know enough about the former and its successes to value it.

### *Establishing a proactive lobbying system*

Elements of a proactive lobbying system suggested by regional meeting participants include:

- **Recognition that lobbying is a year round activity** at both the state and local levels that involves libraries of all types, library personnel at all levels, and library supporters both Friends and volunteers.
- **Pro-active agenda setting:** There is need for a plan and process to annually establish a state-level action agenda of objectives to accomplish with state government (during the legislative session) but also statewide. Specific attention needs to be given to each library type and ways to actively lend support across type should be identified and delivered. A key item for next year’s agenda, participants suggest, is: will we wait for the governor (or his non library aides) to tell library agencies where they will be administratively or will Florida libraries and their supporters respectfully present their plan to the governor (and legislature)? Another agenda item might be fully funding (for the first time) state aid to libraries and multitype cooperatives. The process and plan must be developed in a timely fashion related to state government and legislative activities. The need to speak with one voice is essential. The time to disagree is during the agenda setting process where it will do the most good.

- **Gathering key players together:** say twice a year on a regular (you can count on it) basis. Mentioned on the player list were the State Librarian, Network Advisory Council, key legislative staff, key governor's staff, Education Department, State Technology Office, and others. The purpose would be to iron out an action agenda for the next year.
- **Systematic evidence gathering in support of the agenda:** One part of the lobbying process is making a rational argument based on evidence. With out a coordinated plan and/or paid staff, this argument cannot be made for want of data effectively organized. Making the case doesn't happen by accident and a plan for systematic evidence gathering in support of an annual agenda identifying who does what, how, and with what funding and support is needed.
- **Care and nurturing of local supporters:** Another way of making the case, beyond the rational, is demonstrating voter support... "because often, there is no reward for being rational." The Florida library community has a "well oiled" local support network developed in large part through Library Friends organizations. That network is aging, operates on a shoestring, and will need support to continue to flourish. Specific areas needing attention include: development and maintenance of a computerized database of Friends, volunteers, and library personnel. This multipurpose database is critical for rapidly mobilizing local support. Library supporters need regular issue briefings with specific ways they can communicate their views effectively. Specific attention needs to be devoted to attracting the next generation of Library Friends who better reflect their communities and bring new enthusiasm. Non-public libraries often do not have Friends groups, why not? There is a clear need to identify and mobilize non public library supporters if these libraries care about continuing to receive state (and federal support for their operations)...or wish to get on the radar of state elected officials for state support.
- **Need for statewide, paid lobbyist and staff:** Several suggested the need for a statewide lobbyist and staff to lead and coordinate the various external partner efforts related to library advocacy and lobbying.
- **Add a focus on regional & municipal lobbyists:** Many cities, counties and regions hire lobbyists to promote their interests in Tallahassee. There is a need/opportunity to identify this lobbying group and point out the benefit of specific legislative proposals to each local community and their lobbyists. Data may come from the Division but the approach is best made locally. Consideration should be given to holding a briefing session for these lobbyists in Tallahassee to get library interests on their radar and identify key Division personnel for further consultation.
- **Bring the library community to Tallahassee more often:** Legislative Day is successful, there need to be more occasions where the library community, both staff and supporters, have a visible presence. Examples mentioned include a day when academic reference staff answered government officials reference questions, elected officials reading to children at the library (school and public), etc. With a hook to attract the media with the side benefit of the public having a better understanding of what librarians do and its value.
- **Systematically train library managers:** Lobbying and advocacy at the local, state, and national levels is increasingly necessary. Yet training for library personnel is absent. Indeed, some library managers still believe it isn't part of their job. Librarians may need additional training in the political dimensions of their jobs.

The general view was that the state has an effective, but reactive, lobbying mechanism, there is a need to move this effort to the next level over the next five years. Who will take the lead? The Division can't. Are state-level professional lobbyists (and support staff) for libraries needed? Lobbying has played a significant role in the success of Florida's libraries, the opportunity exists to have still greater impact by adding a proactive stance to a firm reactive base.

### **Governance**

Several specific items related to statewide governance were mentioned by individuals during the regional meetings:

- **State Library Council:** May need new members that are respected, successful, even somewhat notorious, business people, particularly in emerging information technology areas.
- **Florida Library Network Council:** Needs to add a seat for multi-type cooperative representation. (There is one MLC executive director on the FLNC; however, (reportedly) he does not view his role as representing the other MLCs.).
- **Document delivery outsourcing:** May need to add advisory committee, particularly to review RFPs and contracts.

Not enough discussion occurred to suggest the strength of these comments.

### **Assistance with Library Governance across Jurisdictions**

A multi-year effort has been successful in ensuring that each county in the state has provision for library service for its residents. As that goal is now achieved, the issue of whether the county model is still viable has surfaced. This issue, while raised, received scant attention in the regional meetings.

One related matter that did surface was the need for external assistance to advance an effort by several adjacent counties to build a library facility that would serve residents of all of the participating counties. The issues that needed attention and external assistance include:

- **Funding models:** What is the best way to apportion funding for the library? Are there external examples that might serve as models? Can an external partner play a catalyst role bringing the parties together and brokering a deal?
- **Governance:** How shall governance decisions be made? Are there existing models that can serve as models?
- **Incentives:** Can an external partner provide incentives to advance the process?
- **Legal barriers:** Are there legal barriers that need to be addressed to effect a solution?

It was clear that the situation mentioned was not a special case and that other jurisdictions might be facing similar issues over the next five years. In other areas, there was need to provide incentives and facilitate the use of bookmobiles across county or between county and municipal jurisdictions.

### **Address State Level Administrative Fragmentation**

Participants noted that state level responsibility for libraries of all types is spread over a number of state government units, professional associations and Friends and advisory boards. As a consequence libraries do not speak with one voice on issues, before the legislature and governor, with vendors and joint development is slow to occur or does not occur at all. As a result, there is less opportunity or willingness to cooperate and no authority to compel resolution to joint problem solving. This problem has existed for years. However, the next five years will not reward a fragmented profession. The change in the states' political leadership may be the least significant driver although the most visible. Said simply, changes in both technology and task make partnerships across library type and across state government the only smart ways to efficiently and effectively manage contemporary library development (of any type).

The options are to ignore the trends, protect turf, impose a state government administrative solution (increasingly likely) or seek formal and informal, governmental and non-governmental occasions to forge the cooperation necessary to maintain and improve Florida's libraries. The message from the regional meetings is clear in three respects. Library managers are tired of inaction or ineffective action whenever partnerships across libraries, statewide, are required, as it is when lobbying the governor and legislature. Library managers across type don't have enough occasions to talk to each other. When they do, they discover they have a lot in common, there are similar problems and sometimes there are shared solutions. When it comes to elected officials, and the taxpayers they represent, the distinctions between libraries and their separate missions don't matter much.

### **Clarifying Division Mission – Relation to Non-Public Libraries**

“Where does a small research library fit into this? We don't circulate anything, we limit holdings to local history, we have no budget, we want to expand our holdings, organize our materials, become better known, eventually digitize some of our resources. A statewide database of local history is nice. But no one knows where our own city resources are – it has to begin here not at the state level. But we might profit by some attention. I'm not sure that anything discussed today applies to us. What will the state library do for us?”

Non-public libraries indicated that they are unclear about their relationship to the Division. This is due in part to the fragmentation issue discussed above. The overwhelming sense from the sessions with non-public library leaders at the regional meetings was that it was past time for the Division to clarify its mission, particularly with respect to non-public libraries. In addition to a mission statement, an explanation may well be in order. Clarifying questions for the Division to consider based on these meetings include:

- Is the Division a Division of Libraries and Information Services or a Division of Public Libraries or a Division of something else? Is the Division's interest in non-public libraries primarily, how can the mutual or parallel interests of non-public libraries be engaged to advance public library interests in the state?

- If the Division is a Division of Libraries, what specific resources and services can academic, public, school and special libraries expect from the Division over the next five years. {And in some other document, how each of these library types can obtain access to Division resources and services offered.}

The principal point is that non-public libraries are confused, uncertain, and in some cases angry about the Division mission in relation to them and they deserve clarification and an explanation. The clear sense from these meetings was being a Division of Public Libraries was much better than being a Division of Libraries in name only or in unspecified and unclear (particularly to non-public libraries) ways. Many exciting library initiatives underway today in Florida combine the strengths of libraries of different types into new partnerships greater than either separate institution alone. It would be a shame for the Division to not play a full role in the nurturing of these partnerships because the non-public side of the partnership didn't understand the Division's mission.

### **Re-thinking the Strategic Planning Process**

There was basic agreement that this strategic planning process was necessary, helpful, and worthwhile. The Division was praised for initiating and engaging in the process. So the following comments are in the nature of advice for next time a strategic plan is developed:

- **Five years is a stretch:** None of the library manager participants do five year plans any more because years four and five are always unrealistic. Instead, most engage in rolling planning in which a master plan is developed and then assessed and revisited as often as every year or after two years. A cogent argument was made for the need for an annual, state government, lobbying plan in any case.
- **More fully engage non-public libraries:** Non public libraries immediately recognized the utility of a strategic planning process for libraries of all types and were happy, in some cases surprised, to participate. All agreed that a better approach would be to engage each type of library in a separate planning process prior to a joint planning activity. The present effort will not fully capture the priorities and plans of the non-public library sector to the degree it will for public libraries. Next time the recommendation is to separately engage each of the library types using their existing representative organizations and authorities in addition to a joint planning process. This will take time and coordination but the result will be worth it.
- **Increase participation of key stakeholder groups:** Additional attention should be paid to obtaining the views of library middle managers, paraprofessionals, elected officials (at both the state and local levels), library users and present nonusers.
- **The process matters as much as the product:** It was clear from the interactions around the table and after the meetings that this process has to happen more often in the state. The exchange of situations and views fostered, if only for a moment, a greater sense of shared purpose and coordinated vision.
- **Continuous evaluation:** Whatever plan results, there is a need for more frequent assessment of it than once every five years. One participant likened such an evaluation to the publication of a refereed journal article – by the time it is done, it is old news and no one cares.

The general sense was that a more frequent strategic planning process would be helpful to all of the library managers, external partners and citizens in the state.

### **Conclusion**

Study participants, some coming from a considerable distance to attend the meetings, were articulate, enthusiastic, and engaged. Most left feeling they had contributed, had been heard, and had learned something new. They were thankful for being consulted. They want planning activities like this one to continue, indeed be more frequent. They want to meet with librarians from all types of libraries not just their own type. There was the clear sense, perhaps driven by technology and economic necessity, that partnership across library types was increasingly possible and desirable.

The challenge before the Division now is to address the perceptions and the underlying realities they suggest. To craft a plan that suggests ways the library community, the Division, and its external partners can work together with local libraries and their supporters to enhance services for Florida's citizens is the common goal.

## CHAPTER 3: SURVEY RESULTS

To allow participation and input from sources beyond the site visits and other data collection activities, the study team created an online survey open to librarians of all types, users, and others throughout the state. Findings from the site visits and other data collection activities formed the basis for the survey, but the survey had as its primary goal to get as much feedback as possible regarding the future of library development in the state of Florida.

### Methodology

Based on findings from the site visits, the study team drafted a survey form for dissemination online. Selected Division reviewed the survey and made a number of suggestions intended to focus the survey topics and facilitate completion by respondents. The study team revised the initial survey based on the suggestions by Division staff. This version of the survey was pre-tested by a number of librarians of the type who would complete the survey. Feedback provided by the pre-test reviews lead to the final version of the survey form (see Appendix 3-1 for a copy of the online survey form).

The Division arranged for the creation, coding, and maintenance of the online survey. When ready, the Division announced the survey's availability through a number of listservs and other communication tools (e.g., the *Orange Seed*). The survey was available for completion for two weeks, from April 15 through April 30, 2002. Upon completion of the survey's availability, Division staff forwarded the survey responses to the study team in Microsoft Excel format.

The responses to the open-ended questions were downloaded and organized by individual question. A content analysis was then performed on the responses for each question. The responses were coded by identifying the key phrase in each response. The key phrases in the responses were counted and totaled to produce the numbers for each key phrase. The categories for the coding were generally broad, i.e. "Funding increase," rather than a series of categories for increases in different types, sources of, and uses for funding in order to produce meaningful, quantifiable results.

Each response was considered a single response, except in the few cases where the respondent used numbers or had two clearly unrelated comments. All other responses were coded by the dominant key issue in the response. Responses were deemed unusable only in cases in which the study team could not make sense of the comments. Further, responses that indicated "no comment" or "no opinion" were not counted, as they were the equivalent of leaving an answer blank. Once the initial coding was completed, the results were reviewed again for accuracy and reliability.

The below analysis presents the results – both quantitative and qualitative – of the survey with one exception. Due to a coding error with the survey, it was not possible for the study team to present analysis of Question 4 (importance of the areas of library development priority). It was, however, possible to analyze and present the remaining survey questions.



## Survey Respondent Demographics

As Table 3-1 indicates, there were a total of 198 usable surveys completed. Overall, 34.8% of the respondents were public librarians followed by 18.2% academic librarians, 13.1% other (e.g., state library staff, retired librarians), 9.6% community college and special librarians, 4.5% unidentified, 4.0% MLS students and users, 1.5% school librarians, and 0.5% governing board members. Clearly, the majority of respondents were public librarians.

It is interesting to note that the librarians that participated in the survey were experienced, as indicated by their average years of work experience. Overall, the public librarian respondents had an average of 16.3 years experience, with 18.9 years experience for the academic librarians, 13.0 years experience for the other category (e.g., state library staff, retired librarians), 19.1 years experience for the community college respondents, 18.8 years for the special librarian respondents, and 3.3 years for the school librarians.

<b>Respondent Type</b>	<b>Number Responses</b>	<b>Percentage of Responses</b>
Academic Librarian	36	18.2%
Community College Librarian	19	9.6%
Governing Board Member	1	0.5%
Public Librarian	69	34.8%
School Librarian	3	1.5%
Special Librarian	19	9.6%
MLS Student	8	4.0%
User	8	4.0%
Other	26	13.1%
Unidentified	9	4.5%
<b>Total</b>	<b>198</b>	<b>100.0%</b>

## Findings

The survey respondents identified a core set of priority areas for library development in the state of Florida. Presented below, by frequency of mention, are the top seven (7) priority areas as indicated by the survey participants. Tables 3-2 through 3-8 include the top three (3) mentioned priority areas for the ranked seven (7) top priorities.

As Table 3-2 shows, the top three areas of priority ranked number one (1) are:

- Statewide virtual library with licensed databases (39.1%);
- Library personnel (salaries, work conditions, library leadership) (36.4%); and
- Public library funding (obtaining funds from diverse sources, full funding for state aid) (32.7%).

There is some variation in results by librarian type, particularly for the public library funding priority with non-public librarians not rating this as high a priority as public librarians.

Table 3-3 provides the top three areas of priority ranked number two:

- Staff continuing education (MLS for current employees, staff training) (24.1%);
- Statewide virtual library with licensed databases (21.0%); and
- Library personnel (salaries, work conditions, library leadership) (20.5%).

Of note is that academic librarians do not consider the library personnel issue as salient as do other types of librarians.

As indicated in Table 3-4, the top three areas of priority ranked third are:

- Advocacy (27.4%);
- Education and training for the public (literacy, English as a second language, reading readiness) (25.8%); and
- Library construction.

Of interest is that academic librarians have a substantial interest in library construction.

Included in Table 3-5 are the rankings for priority four, which include:

- Role of multitype library cooperatives (30.8%);
- Planning and evaluation of library services (economic impact study, statistics, evaluation of library programs) (20.0%); and
- Marketing and public relations (education and promotion at a state level) (19.5%).

The data indicate that there is an interest across librarian types in the role that Florida's multitype regional cooperatives play in library development.

As demonstrated in Table 3-6, the top three rankings for priority five are:

- Planning and evaluation of library services (economic impact study, statistics, evaluation of library programs) (23.6%);
- Role of multitype library cooperatives (23.1%); and
- Responsibility for setting public library standards (20.8%).

By far, the academic library respondents are interested in the planning and evaluation of library services with 41.2% indicating this as a priority.

**Table 3-2. Ranking of Priority Areas for Library Development in Florida – Top Three Priority 1 Rankings.**

Area of Priority	Survey Respondent Type							Overall
	Academic	Community College	Public	Special	Student	Users	Other	
Statewide Virtual Library with Licensed Databases	48.3% (n=14)	50.0% (n=9)	31.1% (n=14)	38.5% (n=5)	50.0% (n=3)	40.0% (n=2)	29.4% (n=5)	<b>39.1%</b> (n=54)
Library Personnel (salaries, work conditions, library leadership)	35.7% (n=10)	25.0% (n=3)	27.9% (n=12)	46.2% (n=6)	42.9% (n=3)	33.3% (n=1)	45.0% (n=9)	<b>36.4%</b> (n=48)
Public Library Funding (obtaining funds from diverse sources, full funding for state aid)	27.3% (n=3)	25.0% (n=1)	43.1% (n=22)	28.6% (n=2)	20.0% (n=1)	-	20.0% (n=3)	<b>32.7%</b> (n=33)

Note: The analysis in this table does not include individual categories with an overall response of 3 or fewer (member of a library governing body/board or school librarian)

**Table 3-3. Ranking of Priority Areas for Library Development in Florida – Top Three Priority 2 Rankings.**

Area of Priority	Survey Respondent Type							Overall
	Academic	Community College	Public	Special	Student	Users	Other	
Staff Continuing Education (MLS for current employees, staff training)	26.3% (n=5)	44.4% (n=4)	20.5% (n=8)	22.2% (n=2)	42.9% (n=3)	-	23.5% (n=4)	<b>24.1%</b> (n=26)
Statewide Virtual Library with Licensed Databases	27.6% (n=8)	16.7% (n=3)	24.4% (n=11)	23.1% (n=3)	-	20.0% (n=1)	11.8% (n=2)	<b>21.0%</b> (n=29)
Library Personnel (salaries, work conditions, library leadership)	17.9% (n=5)	41.7% (n=5)	23.3% (n=10)	7.7% (n=1)	14.3% (n=1)	-	25.0% (n=5)	<b>20.5%</b> (n=27)

Note: The analysis in this table does not include individual categories with an overall response of 3 or fewer (member of a library governing body/board or school librarian)

**Table 3-4. Ranking of Priority Areas for Library Development in Florida – Top Three Priority 3 Rankings.**

Area of Priority	Survey Respondent Type							Overall
	Academic	Community College	Public	Special	Student	Users	Other	
Advocacy	21.4% (n=3)	50.0% (n=1)	27.3% (n=3)	28.6% (n=2)	-	50.0% (n=1)	27.3% (n=3)	<b>27.4%</b> (n=17)
Education and training for the public (Literacy, English as a second language, reading readiness)	40.0% (n=4)	-	20.0% (n=6)	-	66.7% (n=2)	33.3% (n=1)	33.3% (n=4)	<b>25.8%</b> (n=17)
Library construction	66.7% (n=6)	20.0% (n=1)	13.8% (n=4)	33.3% (n=1)	33.3% (n=1)	25.0% (n=1)	12.5% (n=1)	<b>25.0%</b> (n=16)

Note: The analysis in this table does not include individual categories with an overall response of 3 or fewer (member of a library governing body/board or school librarian)

**Table 3-5. Ranking of Priority Areas for Library Development in Florida – Top Three Priority 4 Rankings.**

Area of Priority	Survey Respondent Type							Overall
	Academic	Community College	Public	Special	Student	Users	Other	
Role of Multitype Library Cooperatives	23.5% (n=4)	42.9% (n=3)	31.6% (n=6)	33.3% (n=2)	100.0% (n=1)	33.3% (n=1)	27.3% (n=3)	<b>30.8%</b> (n=20)
Planning and Evaluation of Library Services (economic impact study, statistics, evaluation of library programs)	11.8% (n=2)	50.0% (n=2)	27.8% (n=5)	50.0% (n=1)	-	-	10.0% (n=1)	<b>20.0%</b> (n=11)
Marketing and Public Relations (education and promotion at a state level)	23.5% (n=4)	9.1% (n=1)	22.6% (n=7)	10.0% (n=1)	-	-	22.2% (n=2)	<b>19.5%</b> (n=17)

Note: The analysis in this table does not include individual categories with an overall response of 3 or fewer (member of a library governing body/board or school librarian)

**Table 3-6. Ranking of Priority Areas for Library Development in Florida – Top Three Priority 5 Rankings.**

Area of Priority	Survey Respondent Type							Overall
	Academic	Community College	Public	Special	Student	Users	Other	
Planning and Evaluation of Library Services (economic impact study, statistics, evaluation of library programs)	41.2% (n=7)	-	22.2% (n=4)	-	-	-	20.0% (n=2)	<b>23.6%</b> (n=13)
Role of Multitype Library Cooperatives	17.6% (n=3)	28.6% (n=2)	36.8% (n=7)	-	-	-	27.3% (n=3)	<b>23.1%</b> (n=15)
Responsibility for setting public library standards	20.0% (n=1)	33.3% (n=1)	19.0% (n=4)	25.0% (n=1)	-	33.3% (n=1)	25.0% (n=2)	<b>20.8%</b> (n=10)

Note: The analysis in this table does not include individual categories with an overall response of 3 or fewer (member of a library governing body/board or school librarian)

**Table3-7. Ranking of Priority Areas for Library Development in Florida – Top Three Priority 6 Rankings.**

Area of Priority	Survey Respondent Type							Overall
	Academic	Community College	Public	Special	Student	Users	Other	
Seeking Partnerships (non-profits, corporations, government agencies)	11.1% (n=2)	66.7% (n=2)	18.8% (n=3)	50.0% (n=5)	100.0% (n=1)	50.0% (n=1)	28.6% (n=2)	<b>26.7%</b> (n=16)
Education and training for the public (Literacy, English as a second language, reading readiness)	20.0% (n=2)	28.6% (n=2)	23.3% (n=7)	-	-	-	25.0% (n=3)	<b>22.7%</b> (n=15)
Cooperative Purchasing and Processing (less popular licensed databases, videos, books)	15.0% (n=3)	40.0% (n=4)	5.9% (n=1)	33.3% (n=3)	-	100.0% (n=1)	9.1% (n=1)	<b>19.7%</b> (n=14)

Note: The analysis in this table does not include individual categories with an overall response of 3 or fewer (member of a library governing body/board or school librarian)

<b>Area of Priority</b>	<b>Survey Respondent Type</b>							<b>Overall</b>
	<b>Academic</b>	<b>Community College</b>	<b>Public</b>	<b>Special</b>	<b>Student</b>	<b>Users</b>	<b>Other</b>	
Library Schools' Statewide Responsibilities (recruitment, design of instructional modules)	25.0% (n=2)	50.0% (n=2)	-	-	60.0% (n=3)	-	20.0% (n=1)	<b>26.5%</b> (n=9)
Marketing and Public Relations (education and promotion at a state level)	17.6% (n=3)	36.4% (n=4)	19.4% (n=6)	30.0% (n=3)	-	-	22.2% (n=2)	<b>21.8%</b> (n=19)
Archives, Records Management, Digitization	7.1% (n=1)	33.3% (n=3)	42.9% (n=3)	30.0% (n=3)	-	50.0% (n=1)	-	<b>21.4%</b> (n=12)

Note: The analysis in this table does not include individual categories with an overall response of 3 or fewer (member of a library governing body/board or school librarian)

From Table 3-7, the top three rankings for priority six are:

- Seeking partnerships (non-profits, corporations, government agencies) (26.7%);
- Education and training for the public (literacy, English as a second language, reading readiness) (22.7%); and
- Cooperative purchasing and processing (less popular licensed databases, videos, books).

The formation of partnerships is a clear priority for all types of librarians with the exception of academic librarians.

As a final ranking of priorities, Table 3-8 provides insight into the top three rankings for priority seven:

- Library schools' statewide responsibilities (recruitment, design of instructional modules) (26.5%);
- Marketing and public relations (education and promotion at a state level) (21.8%); and
- Archives, records management, digitization (21.4%).

As the data indicate, archives, records management, digitization has broad support within the library community.

### Qualitative Survey Questions

Analysis from the qualitative survey questions (questions five through eight) yielded the following results:

- **New priorities.** When asked to identify new priorities for library development in the state of Florida, the respondents indicated similar issues as described in the analysis of survey question three above (see Table 3.9). These include
  - Increase library personnel salary,
  - Increase funding for libraries,
  - Increase promotion/advocacy/awareness of library resources and benefits,
  - Statewide database and catalogue connectivity, and
  - Increase information technology training for library personnel;
- **The ideal.** When asked to comment on the ideal library service and program model, respondents identified the following (see Table 3-10)
  - Collaborations between state libraries in providing and creating a state virtual library,
  - Focuses on individual community and user needs of each library, and
  - Increases in salaries and training of library personnel;
- **Addressing key priorities and the ideal.** Respondents identified the following actions that the library community and partners can take to address statewide library development (see Table 3-11)
  - Collaboration between state libraries in providing services and creating a state virtual library,
  - Increase promotion/advocacy/awareness of library resources and benefits,

<b>Table 3-9. The Two Most Important Other or New Key Library Development Priorities That <i>Should Be</i> Addressed on a Statewide Basis.</b>			
<b>Question</b>	<b>Number of Responses</b>	<b>Most Frequent Responses (by % of total usable)</b>	<b>Typical Comments</b>
Please identify the two most important other or new key library development priorities, programs, dreams, initiatives, opportunities, etc. over the next five years that should be addressed on a statewide basis that are not listed in question 2 above.	130 total usable responses  2 unusable	Increase library personnel salary (13.1%)  Increase funding for libraries (10.0%)  Increase promotion/advocacy/ awareness of library resources and benefits (9.2%)  Statewide database and catalogue connectivity (7.7%)  Increase information technology training for library personnel (7.7%)	“Increase salaries and benefits for professional librarians.”  “Funding for libraries needs to increase, with no conditions.”  “Marketing. We do not share with enough people the changing roles that libraries play.”

- Increase library funding, and
- Increase information technology training for library personnel;
- **Additional comments.** Respondents indicated the following as additional items of concern for statewide library development (see Table 3-12)
  - Focus on individual community and user needs of each library,
  - Increase library funding,
  - Increase library personnel salaries and training, and
  - Focus on technological developments.

The open-ended questions overall, therefore, confirm and expand upon the issues raised in other survey questions and site visit findings.



**Table 3-10. The Ideal Manner in which Library Services Should Evolve in Florida.**

Question	Number of Responses	Most Frequent Responses (by % of total usable)	Typical Comments
Please describe the ideal or best depiction of how library services and programs should evolve in Florida over the next five years.	92 total usable responses  0 unusable	<p>Collaborations between state libraries in providing services and creating a state virtual library (42.4%)</p> <p>Focuses on individual community and user needs of each library (9.8%)</p> <p>Increases in salaries and training of library personnel (6.5 %)</p>	<p>“I love the idea of a Virtual Library and statewide reciprocal borrowing and document sharing.”</p> <p>“Proactive in bringing Florida libraries together in a cohesive, collaborative, relationship.”</p> <p>“Library services should be as seamless as possible. Providing statewide reference services at no cost to the user. Patrons should not be limited by regional or county for access to information or the ability to check out materials.”</p>

**Table 3-11. The Two Key Actions That Libraries and Partners can take to Address Statewide Library Development.**

Question	Number of Responses	Most Frequent Responses (by % of total usable)	Typical Comments
What two key actions can the library community and library partners take to address statewide library development over the next five years?	135 total usable responses  0 unusable	<p>Collaboration between state libraries in providing services and creating a state virtual library (20.7%)</p> <p>Increase promotion/advocacy/ awareness of library resources and benefits (17.0%)</p> <p>Increase library funding (11.9%)</p> <p>Increase information technology training for library personnel (8.9%)</p>	<p>“Participate in statewide virtual library development.”</p> <p>“Statewide collaboration.”</p> <p>“Cooperative efforts of intra/inter community libraries.”</p> <p>“Promotion/marketing of libraries on a statewide basis.”</p> <p>“The first thing is to get more money—dependable sources of money.”</p>

<b>Question</b>	<b>Number of Responses</b>	<b>Most Frequent Responses (by % of total usable)</b>	<b>Typical Comments</b>
What did we forget to ask you? What is the one key item you would like to add regarding the five-year plan for statewide library development?	38 total usable responses  1 unusable	Focus on individual community and user needs of each library (15.8%)  Increase library funding (13.2%)  Increase library personnel salaries and training (13.2%)  Focus on technological developments (7.9%)	“Realize that libraries and the communities they serve are different and that one-size-fits-all is not appropriate in all situations.”  “It all comes back to budget and money. Statewide library development should be a continuing priority.”  “Compensation is most important.”

### Summary and Conclusion

The findings from the survey identified some key confirmatory themes regarding library development in Florida over the next three to five years that surfaced in the site visits:

- Build the virtual library;
- Invest in library personnel, to include increased salaries, training, (programs, services, and technology), and leadership;
- Obtain new funding (or at least full funding for state aid) for libraries;
- Create a collaborative environment between libraries, multitype library consortia, library schools in the state, and non-library partners (e.g., corporations, non-profits). This includes the creation of a statewide borrowing system;
- Market libraries and library services to a wide range of customers – not just existing patrons;
- With Florida’s diverse population, engage in programs that provide training and education for various user communities and populations; and
- In the creation of library programs and statewide development, remember that libraries and their users are not the same – allow for flexibility in the program requirements.

Together with the site visit findings, the survey results provide the basis for a number of directions and issues that the Division should consider in the development of its LSTA plan. Chapter 4 discusses these in detail.

## CHAPTER 4: CONSIDERATIONS IN DEVELOPING THE STRATEGIC PLAN

Strategic planning is an essential component of library services, facilities, technology, and resource development. Given the rapidly changing environment in which libraries must operate, such planning is essential to:

- Insure that community information needs are identified and responded to within the limits of available resources;
- Educate the community, government officials, staff, trustees, and others as to the mission, goals, and objectives of the library;
- Assist in making decisions about how to allocate resources to which services and programs;
- Provide a basis by which the director and the trustees can monitor and assess the quality and effectiveness of the library and take corrective actions quickly if necessary;
- Provide evidence to local and state government officials that the library is constantly engaged in on-going improvement;
- Offer a roadmap for developing and implementing the services, programs, and activities that are *most important* for the library to accomplish;
- Encourage library staff to consider the outcomes and impacts of library services and programs; and
- Coordinate statewide library services and access to those services across the entire library community.

In short, the process of strategic planning is a tool that can assist the state's library community and external partners to better respond to local, state, and national needs. Such planning can provide a basis for the state library to determine which possible goals and objectives are *most important* for the library community and the state.

### Key Topics and Recommendations

Ultimately, the Division (with the input from this report and other knowledge of library development in the state) will determine what is *most important* to be or not be included in the strategic plan. The study team, however, would offer a brief number of comments and recommendations that should be considered as the Division completes the strategic plan. These are not intended to be a comprehensive discussion of possible topics and recommendations, rather they are key items that the consultants especially want to highlight to Division staff as they develop the plan.

### Focus Priorities, Goals, and Objectives

The findings presented in this report summarize a potentially *huge* agenda for the strategic plan. The degree to which statewide planning and state library resources can address all of these topics is limited. Thus, if all the topics are important, than none of the topics are important. The study team recommends that less is more. Concentrating resources and planning efforts on fewer priorities and doing them well is likely to result in greater pay-off than spreading

resources across an excessive number of priorities, goals, and objectives. The state library should not come out of this planning process overloaded with new and more priorities.

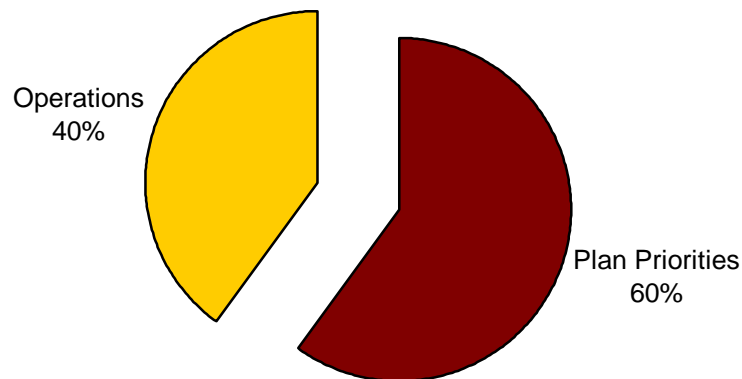
In determining what priorities are most important we recommend that the Division think in terms of which will:

- Increase the greatest access to information to the greatest number of residents;
- Leverage resources across multiple priorities;
- Attract external partners for obtaining their support and involvement;
- Exploit new information technologies; and
- Result in identifiable and discernable accomplishments.

The Division is likely to have other criteria that can be used as well.

In addition to assessing priorities, the Division may wish to think in terms of a percentage of level of effort that they would commit to the various priorities. During the meeting between the study team and state library staff on May 1, 2002, we suggested that when thinking about priorities, think in terms of a circle that constitutes 100% total available level of effort (see Figure 1). We also recommended that 60% of that circle (in terms of level of effort) be made available for the plan's priorities and goals. The remaining 40% available should be committed to the day-to-day activities that the state library must continue doing by law and as part of their normal activities. Regardless of the actual percentage to be dedicated to priorities, *the total level of effort cannot exceed 100%*.

**Figure 1. Use of Division Resources.**



## Identifying “Out of the Box” Priorities

In early discussions with state library staff regarding this project, the consultants were encouraged to collect data that would identify priorities and “ideal states of Florida library services” that were especially innovative and represented “out of the box” thinking. The study team employed probes during the regional meetings as well as on the survey to address this suggestion. The results, however, identified very limited “out of the box” priorities or suggestions. Participants in the study offered very grounded, practical, and day to day priorities – priorities that would affect the degree to which they currently provide information services or could provide them better. As suggested above, the vast majority of participants saw the virtual library as the top priority with little question.

Thus, if the Division staff want to incorporate radically new, innovative, and out of the box priorities into the strategic plan, they will need to take responsibility to do so themselves. This might be done by incorporating such priorities as part of the virtual library development. Overall, however, the study team heard little discussion for radical re-organization of the state library; re-vamping the role and responsibilities of the regional cooperatives; national leadership and policy issues; establishing new governing techniques to better coordinate library services statewide; supporting a new statewide income generator for libraries, etc. Out of the box priorities, if included in the plan, will need to originate from Division staff.

## Priority of the Virtual Library

The regional meetings, interviews with individuals in the state, and the findings from the survey all support the development of the statewide virtual library as a top priority. Given the current planning for the virtual library, there are great expectations for the development and implementation of the virtual library – and development that the library community wants to see NOW. Thus, the study team recommends that for this planning cycle the virtual library is clearly a top priority. This is not to say that there are few other priorities. It is relatively easy to point to the virtual library as a top priority, more difficult, however, is to determine what overall level of effort the state library should ascribe to the virtual library development versus all other priorities.

Digitally networked information technologies in the form of a virtual library offer the opportunity for the Division and the library community to rapidly offer high quality information resources and services under the umbrella of a statewide virtual library *directly* to taxpayers (rather than through libraries). Said differently, the Division could face a fork in the road: will it continue to serve libraries (indeed really only public libraries) or will the Division serve directly those who fund it: the taxpayers and state government? Or, should the Division try to do both?

Some thought may be needed now as to:

- (1) The role of the state library in supporting different constituencies as a result of implementing a virtual library;
- (2) Funding models that address issues of which stakeholder groups contribute what resources for what services; and

- (3) Impacts resulting from direct user access to the virtual library without either physical or other access via individual libraries.

The study team is aware that detailed planning for the virtual library is still in progress. Nonetheless, our experience in this area suggests that easier decisions are in the area of the content and services to be provided by the virtual library. Harder decisions occur in administrative structure, financial support and funding strategies, and coordination across multiple library types.

### **Support for the Division**

From the regional meetings there was wide support for the Division, what it does, how it works in the state, and the importance of having the credibility and visibility of the Division consultants evident at the local level. Yet, there are literally endless “opportunities” for the state library staff to assist library development statewide and especially at the local level. In the development of this five-year strategic plan, the study team recommends that some attention be given to providing greater support for the Division staff to provide additional support at the local level. Such support is probably best determined by the Division itself. It is clear, however, that support for the state library to continue and extend its leadership role – especially at the local level, is one of the most effective means to leverage available resources.

### **All Priorities may not be Addressed**

At the May 1, 2002 meeting with Division staff and the study team, we recommended that as a first step in identifying priorities, the various potential topics and priorities be grouped into key themes. As part of that meeting we facilitated a group discussion that identified 6-8 key theme areas from which goals and priorities could be developed. During the discussion, it was clear to the study team that the participants have a great appetite for addressing a broad range of priorities in the strategic plan. The study team, however, would point out that some of the priorities, while important, simply cannot be, or will not be, addressed in this particular planning cycle but may be addressed in a later planning cycle. In short, the strategic plan may identify priorities for statewide library development for which the state library cannot at this time take action until adequate resources or other issues are addressed.

### **Continuous Planning Cycles**

The study team recognizes that by law, the state library must submit a five-year plan to the Institute for Museum and Library Services (IMLS). But planning for five years in the future is almost impossible given the current political, social, economic, and technological environment. Within that five-year plan, we recommend that there be included one-year review and assessment cycles that will allow the state library to make mid-stream corrections, changes, additions, and deletions. In April-May of each planning year (assuming the plan runs from July 1 to June 30), the Division should engage in a process that:

- Determines the degree to which annual goals and objectives have or have not been accomplished;

- Assesses the allocation of resources to existing objectives and those for the next year;
- Obtains input from the statewide library community as to how the plan needs to be revised for the next yearly planning cycle. This may include regional meetings or a survey such as was done for this report;
- Revises the annual objectives as necessary; and
- Reports on these modifications to IMLS.

It is possible that the goals for the five-year period can be constant or require limited change. Within those goals, however, annual objectives and assessment criteria can be modified to fit current conditions and changing needs.

### **Equity**

The Division has played an important role in addressing equity issues related to library and information services throughout the state. The emphasis may shift in several ways over the next five years. Every effort should be made to ensure equal access to the statewide virtual library information services and resources throughout the state. The Division should identify areas of information *inequity* and bring them to the attention of the library community, taxpayers, and state government with a specific plan for addressing each area identified. The Division can proceed to address the information inequity with available resources but point out that serious efforts to address these inequalities can result only if a plan is funded to do so. Candidates for attention should include libraries whose local contribution falls below a certain threshold, prison libraries, services to non-English language users, services to those with handicaps, and services to the illiterate broadly defined.

### **Video Conferencing**

As part of the Virtual Library, or perhaps as a stand alone priority, the state library should explore the possibility of implementing a statewide interactive video conferencing system. The technology has now come to such a point where it is highly reliable, provides excellent interaction, excellent quality, and can be used to accomplish a number of priorities identified earlier in this report. A statewide system with studios and regional classroom/meeting spaces located strategically around the state can be used to conduct meetings, provide continuing education, engage local officials and users, and a host of other activities. Such a system could help leverage state library staff time – as well as the time and resources of others in the library community around the state.

### **Importance of the Planning *Process***

The development of the next strategic plan provides an opportunity for the Division, local libraries, and others interested in library development to redefine and renew the State Library's key role in library development throughout the state. It also provides an opportunity to influence the role played by other important library organizations in achieving a shared statewide vision for the future. The process used to craft the plan may be as important as the final planning document.

Regional meeting participants regularly complemented members of the study team about the manner in which the state library obtained input and listened to the views and suggestions from the library community in the state. As suggested earlier, we believe it is essential that the state library's planning and needs assessment process continue throughout the next five-year period. That process should provide mechanisms for the Florida library community and others to discuss planning initiatives, consider the success of current efforts, and decide on those initiatives for the future that are *most important* to be undertaken. Regardless of the nature of the final plan that results from the current effort, mechanisms should be included over the next five years that regularly obtain input, suggestions, and ideas from the larger library community.

### **Making a Difference**

The findings from the needs assessment reported here suggest a robust and extensive list of needs and potential priorities for statewide library and information services that can be considered for the strategic plan. The process also identified a significant number of individuals who had excellent ideas and suggestions for how the state should proceed with library development over the next five years. Nonetheless, all of the needs and potential priorities cannot be addressed in this version of the plan. Thus, to make a difference in improving the overall extent, quality, and impact of library and information services over the next five years, the state library will need to choose its priorities carefully.

But as important as selecting the priorities will be, marshaling the resources and political support statewide to implement the plan will be equally important. As in the past, statewide leadership from the state library will be critical to assist the broader library community, its external partners, and the state's residents to reach these goals and *make a difference* in improving the provision of and access to information resources and services to Florida residents.



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## APPENDIX 2-1: REGIONAL MEETING INSTRUMENTS

### Survey for the Five Year Strategic Plan for Library Development

Thank you for participating in this study, the intent of which is to identify goals and objectives for Florida library development over the next five years. The study is being conducted on behalf of Florida Department of State, Division of Library and Information Services, by Dr. Charles R. McClure and Dr. John Bertot, of the Information Use Management and Policy Institute at the School of Information Studies, Florida State University.

Your participation in this study is voluntary. If you choose not to participate or complete the survey, there will be no penalty. The questionnaire and identifying information obtained during the course of the study will remain confidential to the extent allowed by law. The results of the study may be published but your name will not be used in any form. If you have any questions concerning the research study, please contact Sondra Taylor-Furbee by telephone at (850) 245-6631, or by e-mail at <staylor-furbee@mail.dos.state.fl.us>. Again thank you for your time and interest in libraries.

1. Check the *one box* that best describes your involvement in libraries:

- public librarian       academic librarian       school librarian  
 special librarian       library user       community college librarian  
 member of a library governing body or board       M.L.S. student  
 other, please describe \_\_\_\_\_

2. If you are currently a librarian or working in a library setting, how many years total library experience do you have? \_\_\_\_\_ years

3. **Key Priorities:** Identify key priorities (plans, dreams, needs, issues, opportunities, etc.) over the next five years better addressed with help from an external partner, like the Division, or addressed on a statewide basis?

- a. \_\_\_\_\_  
b. \_\_\_\_\_  
c. \_\_\_\_\_  
d. \_\_\_\_\_

4. **Addressing the Priorities:** What are new or continuing actions, activities, services or initiatives better provided with help from an external partner, like the Division, or on a statewide basis over the next five years?

- a. \_\_\_\_\_  
b. \_\_\_\_\_  
c. \_\_\_\_\_  
d. \_\_\_\_\_

5. **Additional Comments:** What did we forget to ask you (use back as needed)?

**APPENDIX 3-1: ONLINE SURVEY FORM**

**Survey for the Five Year Strategic Plan for Library Development**

Thank you for participating in this study, the intent of which is to identify goals and objectives for Florida library development over the next five years. The study is being conducted on behalf of the Florida Department of State, Division of Library and Information Services, by Dr. Charles R. McClure and Dr. John Carlo Bertot, of the Information Use Management and Policy Institute at the School of Information Studies, Florida State University.

Your participation in this study is voluntary. If you choose not to participate or complete the survey, there will be no penalty. The questionnaire and identifying information obtained during the course of the study will remain confidential to the extent allowed by law. If you have any questions concerning the research study, please contact Sondra Taylor-Furbee by telephone at (850)245-6631, or by e-mail at [staylor-furbee@mail.dos.state.fl.us](mailto:staylor-furbee@mail.dos.state.fl.us).

**1. Select the item that best describes your involvement in libraries (Q1):**

- public librarian
- special librarian
- member of a library governing body or board
- other -- please describe (Q1\_other):
- academic librarian
- library user
- M.L.S. student
- school librarian
- community college librarian

**2. If you are currently a librarian or working in a library setting, how many years total library experience do you have (Q2)?**

**3. Ranking known priorities:** Participants in the study to date have identified the following priority areas for library development in Florida over the next five years. Please rank your top seven in these priorities (1=Highest Priority, 7=Lowest Priority; select only seven):

- Statewide Virtual Library with Licensed Databases (Q3\_1)
- Statewide Library Card (Q3\_2)
- Services to Special Populations (Non\_English language users, homebound citizens) (Q3\_3)
- Library Personnel (Salaries, work conditions, library leadership) (Q3\_4)
- Staff Continuing Education (MLS for current employees, staff training) (Q3\_5)
- Education and training for the public (Literacy, English as a second language, reading readiness) (Q3\_6)
- Cooperative Purchasing and Processing (Less popular licensed databases, videos, books) (Q3\_7)
- Responsibility for setting public library standards (Q3\_8)
- Marketing and Public Relations (Education and promotion at a state level) (Q3\_9)

- Advocacy (Q3\_10)
- Seeking Partnerships (Non\_profits, corporations, government agencies) (Q3\_11)
- Public Library Funding (Obtaining funds from diverse sources, full funding for state aid) (Q3\_12)
- Role of Division of Library and Information Services Consultants (Q3\_13)
- Planning and Evaluation of Library Services (Economic impact study, statistics, evaluation of library programs) (Q3\_14)
- Library Construction (Q3\_15)
- LSTA Funds to Support Experimentation and Innovation (Q3\_16)
- Role of Multitype Library Cooperatives (Q3\_17)
- Archives, Records Management, Preservation, Digitization (Q3\_18)
- Reinvent Library Development Planning Process (Q3\_19)
- Library Schools' Statewide Responsibilities (Recruitment, design of instructional modules) (Q3\_20)

**4. Please help us identify** key aspects of the following priorities that have been identified by ranking the following topics.

Topic	1=Not Important 5=Very Important	No Opinion
<b>Statewide Virtual Library with Licensed Databases:</b>		
Statewide library card (Q4_1)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Shared union catalog (including patron initiated interlibrary loan) (Q4_2)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Statewide multitype reciprocal borrowing agreements (i.e., allow residents to use library materials from outside their communities) (Q4_3)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Statewide multitype document delivery (Q4_4)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<input type="radio"/>

	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	
Statewide multitype reference service (e.g., 24x7 virtual reference) (Q4_5)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Licensed databases (Q4_6)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
State government information (Q4_7)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Online instructional assistance (e.g., for using databases, frequently asked information questions) (Q4_8)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Online multilingual instructional assistance (Q4_9)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>

**Library Personnel:**

Standardized job descriptions (Q4_10)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Promote librarianship as a career (Q4_11)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Recruit librarians (Q4_12)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Fill new library roles with non_MLS candidates (Q4_13)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Replacing senior library leadership (Q4_14)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Develop small library manager leadership skills (Q4_15)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Facilitate flow of needed professionals for libraries (e.g., coordinate with library schools, recruitment) (Q4_16)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>

**Staff Continuing Education:**

Provide more ways to obtain the MLS on the job (Q4_17)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Preparing the next generation of senior library managers (Q4_18)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Focus on key recurring management issues (Q4_19)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Identify and train next generation of middle managers (Q4_20)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Provide training in Non_IT related topics (Q4_21)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>
Provide training in IT related topics (Q4_22)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/>

Develop a paraprofessional training program (Q4_23)	<input type="radio"/>	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Provide incentives to educators to participate in continuing education (Q4_24)	<input type="radio"/>	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Make increased use of distance digital education (Q4_25)	<input type="radio"/>	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Increase face-to-face continuing education (Q4_26)	<input type="radio"/>	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>

**5. Other/New Priorities:** Please identify the two most important other or new key library development priorities, programs, dreams, initiatives, issues, opportunities, etc., over the next five years that *should be* addressed on a statewide basis that are not listed in question 2 above (Q5\_1/2).

**6. The Ideal.** Please describe the *ideal or best depiction* of how library services and programs should evolve in Florida over the next five years (Q6).

**7. Addressing Key Priorities and the Ideal:** What two key actions can the library community and library partners take to address statewide library development over the next five years (Q7\_1/2)?

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**8. Additional comments:** What did we forget to ask you? What is the one key item you would like to add regarding the five\_year plan for statewide library development (Q8)?

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SUBMIT