



Tennessee State Library and Archives
Secretary of State Tre Hargett

Library Services and Technology Act 2013-2017 Five-Year Plan Evaluation

Evaluation Completed by Sandra Nelson
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Evaluation Summary

This report includes an assessment of the programs funded by the Library Services and Technology Act (LSTA) monies that were awarded to the Tennessee State Library and Archives (TSLA) to support the goals of the TSLA's Five-Year Plan, the *Library Services and Technology Act Plan 2013-2017*. LSTA awards can be expended over a two-year period and TSLA typically spends LSTA monies during the second year of the award. Therefore, while this report covers the LSTA programs supported by the LSTA funds awarded in Federal Fiscal Year (FFY) 13, FFY 14, and FFY 15, those funds were expended in FFY 2014, FFY 2015, and FFY 2016.

"The Tennessee State Library and Archives has been able to expand and enhance services to local libraries across our state with the help of LSTA funding." – Tre Hargett, Secretary of State

This introduction has been divided into three parts: A) An assessment of the programs funded with LSTA monies, B) a review of the management of the Five-Year Plan, and C) a summary of the evaluation methodology used during this assessment.

A. ASSESSMENT OF PROGRAMS FUNDED WITH LSTA MONIES

1. Progress toward Reaching the Goals

Goal 1: All Tennessee residents will be able to locate and access library and information resources that are relevant to their lives through the provision of traditional reading materials, non-print media, online and downloadable resources and electronic networks.

Goal 1 was partially achieved. There were nine separate programs under this goal. One of the programs exceeded its objective, four programs achieved their objectives, two programs partially met their objectives, one program did not meet its objective, and one program was not implemented with LSTA monies. Four of these programs accounted for 80.1% of the total LSTA expenditures during the three Federal fiscal years covered in this report:

- **Tennessee Electronic Library (TEL):** 27.24% of total LSTA expenditures

The primary TEL objective was to increase use by 10%. The term "use" was not defined, but if "use" is considered full-text retrieval, the objective was exceeded by a significant percentage. The number of full-text retrievals increased by 49.66% between FFY 2014 and FFY 2015 and by 64.18% between FFY 2015 and FFY 2016 for a total three year total of 34,859,154 retrievals.

- **Statewide Union Catalog (ShareIt):** 19.62% of total LSTA expenditures

The objective for this program was to provide a statewide catalog of holdings of all public libraries in Tennessee, with electronic access to the holdings of several academic libraries. This objective was achieved. All Tennessee public libraries and three of Tennessee's academic libraries have added their holdings to ShareIt. ShareIt is the primary means of managing interlibrary loan (ILL) transactions for many of the public libraries in eight of Tennessee's nine library regions. ShareIt is also used as a cataloging resource by many of the smaller public libraries in the state. This program included funding for the Bibliographic Services Coordinator position and cataloging software for the nine regional libraries.

- Network Services Consultants: 16.66% of total LSTA expenditures

The objective for this program was to successfully resolve 90% of all computer concerns/issues within one week of the initial request for assistance. This ambitious objective was partially achieved and there was improvement every year. Between 10/1/13 and 9/30/14, 75% of the concerns/issues were resolved in less than one week. That percent increased to 76% the next year, and 79% between 10/1/15 and 9/30/16. The Network Services Help Desk is staffed by the 14 members of the Network Services Unit on a rotating basis. They responded to over 4,000 requests for assistance in the past two years and 95% of the library staff members they helped who completed an evaluation rated the services they received as "Excellent."

- Materials for the Disadvantaged: 16.53% of total LSTA expenditures

The objective for this program was to provide at least 95% of Tennessee's public libraries with materials to be used to serve disadvantaged populations. This objective was achieved. These funds provided an average of \$0.11 per capita in additional materials monies for all participating non-metropolitan libraries. This may not seem like a lot, but for the 71 public libraries serving populations of less than 10,000 people that had an average of \$0.70 per capita in local funds for materials, this was a 15% increase.

The five additional programs under Goal 1 accounted for 9.7% of the total LSTA expenditures during the three Federal fiscal years in this report:

- Matching Technology Grants to Libraries: 7.05% of total LSTA expenditures

This program had two objectives: 1) provide 50/50 matching technology grants each year; and 2) reach or surpass 1 computer per 1,000 residents in Tennessee's public libraries. The first objective was reached and the second was exceeded. TSLA awarded 367 matching technology grants between FFY 2014 and FFY 2016 and the number of computers per 1,000 population increased from 1.14 to 1.17.

- Tennessee Library for the Blind and Physically Handicapped (LBPH): 2.30% of total LSTA expenditures

The objective for this program was to enhance the quality of life for Tennesseans with print disabilities through the provision of specially formatted materials. This is a subjective measure, but based on the responses from the 2016 LBPH survey, the people who use LBPH are very positive about services they receive. LSTA funds were used to pay the salary and benefits of one full-time Reader Advisor as well as for the purchase of large-print books, and outreach services, travel, and equipment.

- Interlibrary Loan Assistance: Group Access Capability (GACs): 0.06% of total LSTA expenditures

The objective for this program was to increase the ILL assistance by 10%. This objective was not achieved. The program is intended to supplement the in-state ILL processes supported by ShareIt (see above). Public library staff in Tennessee are encouraged to refer ILL requests that cannot be filled from ShareIT to one of the two regional libraries with GAC access to WorldCat. Staff then request the item from an out-of-state library. During the three years covered in this report, both the number of ILL requests received and the number of ILL requests filled by the two regional libraries with GAC access to WorldCat declined.

- Statewide Integrated Library System (VERSO): 0.32% of total LSTA expenditures

This objective of this program was to reduce the number of Tennessee public libraries operating with either a non-supported integrated library system (ILS) or no automation system by 25%. This objective was exceeded. At the start of FFY 14, there were 14 libraries with non-supported automated systems and another 21 with no ILS at all. By the end of FFY 15 there were only 4 libraries with non-supported automated systems and 10 libraries with no ILS, a reduction of 40%.

- Courier Services: This program was shifted to alternative funding.

Goal 2: All Tennessee residents will have the reading skills, information resources, and library services needed to succeed in school, at work, and in their daily lives.

This goal was supported by one program, R.E.A.D.S., which exceeded one of the targets in its objective and partially achieved the other. The R.E.A.D.S. program accounted for 7.39% of the total LSTA expenditures during the three Federal fiscal years covered in this report.

- R.E.A.D.S.: 7.39% of total LSTA expenditures

There was one objective for the R.E.A.D.S program in the Five-Year Plan with two targets: 1) the size of the digital collection would grow by 50%; and 2) usage would increase by 75%. The first target was exceeded and the second was partially achieved. At the beginning of FFY 14, the collection had 85,734 items. At the end of FFY 2016, the collection had grown to 156,629 items, an 83% increase. During FFY 2014, the total R.E.A.D.S. circulation was 1,586,777. During FFY 2016, the total circulation had grown to 2,569,176, an increase of 62%. This was lower than the target in the objective, but nearly the maximum circulation possible given the size of the collection and the three-week loan period.

Goal 3: All Tennessee residents will benefit from enhanced library and information services because library staff members have the knowledge, skills, and competencies to offer high-quality 21st century library services.

This goal has been partly achieved. There were three programs under this goal: one exceeded its objectives; one achieved its objectives; and one partially achieved its objectives. Together, the three programs accounted for 2.4% of the total LSTA expenditures during the three Federal fiscal years covered in this report.

- Continuing Education Summit: 0.04% of total LSTA expenditures

The objective for this program was to host a Continuing Education Summit, partnering with other Tennessee library stakeholders. This objective was partially achieved. The summit was held, but the only attendees were TSLA staff members. The summit resulted in the *Continuing Education Plan, FY 2016-2019*, which identified 25 staff competencies and developed a five-year schedule for presenting training on those competencies.

- Staff Development: 0.24% of total LSTA expenditures

The objective was to provide a core competencies-based continuing education program for regional and public library staff and trustees. This objective was achieved. LSTA monies were used to provide access to online learning platforms, web conferencing software, and LibGuides, a collection of resources for projects and services that are offered by the TSLA Planning and Development team.

- Technology Enhancements for TSLA's Public Library Support System: 2.13% of total LSTA expenditures

The objective for this program was to address at 50% of the library technology needs outlined in the Information Systems Plans for the regional libraries and the Planning and Development staff. This objective was exceeded. During the years covered in the report, 100% of the requested items were purchased.

2. National Priority Areas

The three goals in Tennessee Five-Year Plan supported three of the national priorities associated with the Measuring Success focal areas and their corresponding intents: Information Access; Lifelong Learning; and Institutional Capacity.

The focal area *Information Access* has two intents: 1) improve users' ability to discover information resources, and 2) improve users' ability to obtain and use information resources. All eight of the programs under Goal 1 supported this focal area. The eight programs can be divided into four broad categories.

- Bibliographic Access and Resource Sharing: Three LSTA-funded programs supported and improved bibliographic access and resource sharing: ShareIt, the statewide union catalog; Group Access Capability (ILL/GAC); and VERSO, the statewide integrated library system.
- Online Databases: The TEL databases provided an easy way for users to search information across a variety of resources and to view or download the information they find.
- Information Technology: The Matching Technology Grants to Public Libraries provided public libraries across the state with resources to purchase the technology needed to support access to resources, and the Network Services Consultants provided the training and technical support library staff needed to install and maintain that technology.
- Materials for Special Populations: LSTA monies were used to assist local public libraries to purchase materials for disadvantaged populations, and to pay for the salary and benefits for one Reader Advisor at the Tennessee Library for the Blind and Physically Handicapped. Funds were also used to purchase large-print books to supplement the materials provided from the National Library Service for the Blind and Physically Handicapped/Library of Congress.

The focal area *Lifelong Learning* has one intent: Improve users' general knowledge and skills. Goal 2 supported this focal area and intent.

- Digital Lending Collections: R.E.A.D.S. is the Tennessee digital library and provides access to ebooks, audiobooks, videos, and magazines. During the three years covered in this report, the R.E.A.D.S. collection increased by 87% and circulation of R.E.A.D.S. materials increased by 62%.

The focal area *Institutional Capacity* has two intents: 1) improve the library workforce; and 2) improve the library's physical and technological infrastructure.

- Continuing Education: LSTA monies were used to support a Continuing Education Summit that resulted in the *Continuing Education Plan, FY 2016-2019*. LSTA monies were also used to provide access to online learning platforms, web conferencing software, and LibGuides, amcollection of resources for projects and services that are offered by the TSLA Planning and Development team.

- Technology Enhancements for the TSLA Public Library Support System: TSLA's public library support system includes the staff of the Planning and Development unit and the staff in the nine regional libraries. This program was used to purchase the up-to-date hardware and software that staff need to function effectively.

3. Target Audiences

TSLA did not allocate more than 10% of the LSTA funds expended during the three years covered in this report to a specific target audience. Instead most of funds were used to support programs that were available to all Tennesseans.

B. MANAGEMENT OF THE FIVE-YEAR PLAN

The TSLA senior management team worked together to ensure that programs were in compliance with LSTA requirements and that the Annual Reports were completed accurately and on-time. The State Librarian and Archivist chaired quarterly meetings of the TSLA staff members responsible for managing LSTA programs, during which program managers discussed their grant-related activities and reviewed their budgets.

There was only one significant change made in the Five-Year Plan. Firefly, the statewide courier service, was originally intended to be partially funded with LSTA monies. However, the program ended up being fully funded with state monies and the LSTA monies allocated for the courier were reallocated to other programs.

Information about LSTA programs and services was regularly shared with a variety of stakeholders. Senior staff meet with LSTA program managers quarterly to review the status of programs. The LSTA Coordinator uses information from those meetings to prepare reports for the quarterly meetings Tennessee Advisory Council on Libraries (TACL) and the Regional Library Directors. The State Librarian and Archivist used the same information to report to the Secretary of State. In addition, the TEL program manager makes regular reports to Tenn-Share, a statewide resource sharing organization.

C. EVALUATION METHODOLOGY

In July 2016, TSLA issued a *Request for Quotes: LSTA Five Year Plan Evaluation*. The agency received two responses and selected Sandra Nelson to be the independent evaluator. Ms. Nelson has extensive experience with LSTA programs and has completed previous LSTA evaluations. She has also provided evaluation services for the Bill & Melinda Gates Foundation, the FINRA Investor Education Foundation, and various state library agencies.

Ms. Nelson used a variety of methods to gather data, including a review of existing LSTA documents, individual program evaluation data, interviews, and meetings with stakeholder groups. Stakeholders included TSLA staff, the TACL, public library staff members, and members of the public.

Key findings from this report will be shared with stakeholders in a variety of ways. The Tennessee Secretary of State, members of TACL, and TSLA staff members will receive a copy of the completed evaluation document. A copy of the full report will be made available to the public on the Secretary of State's website. This introduction has been written to serve as a standalone document, and a PowerPoint presentation has been developed to support this document. These two resources will be made available to the staff in the nine regional libraries, who will be encouraged to share them with the staff and trustees in the public libraries in their regions. The TEL program manager will present the TEL findings to the board of Tenn-Share.

A. Retrospective Questions

A-1. PROGRESS TOWARD REACHING EACH OF THE THREE GOALS IN THE FIVE-YEAR PLAN

There were three goals in Tennessee's *Five-Year Plan 2013-2017* and a total of 13 separate programs. This evaluation report includes data on the progress made toward reaching the objectives for each of the 13 programs in the three federal fiscal years (FFY) for which data is available.

LSTA monies are awarded to TSLA each year and each LSTA award can be expended over a two-year period. TSLA typically spends LSTA money during the second year of the award. This report covers the LSTA programs supported by the LSTA funds awarded in FFY 13, FFY 14, and FFY 15. The funds awarded in those years were expended in FFY 2014, FFY 2015, and FFY 2016.

Goal 1: All Tennessee residents will be able to locate and access library and information resources that are relevant to their lives through the provision of traditional reading materials, non-print media, online and downloadable resources and electronic networks.

Goal 1 was partly achieved. There were nine separate programs under this goal. One of the programs exceeded its objective, four programs achieved their objectives, two programs partially met their objectives, one program did not meet its objective, and one program was not implemented with LSTA monies.

1. Materials for the Disadvantaged

LSTA Expenditures FFY 13-FFY 15: \$1,523,139 (16.53% of Total LSTA Expenditures)

Objective: From 2013-2017, at least 95% of Tennessee's public libraries receive materials that are used to serve disadvantaged populations. *This objective was achieved.*

During each of the three years for which there is data available, all 170 public libraries that are part of the Regional Library System and all four of the state's metropolitan public libraries received part of the \$508,800 that was allocated for this purpose. The ten independent public libraries in the state were not included in the program.

"I have used the Federal funds to triple the size of our Large Print collection to support our county's aging population and the needs of the local nursing home. The seniors are thrilled with the expanded collection." - Library Director

This program provides vital resources to Tennessee's small and mid-sized libraries. Ninety-six percent of the total allocation (\$486,400) was distributed to the 170 non-metropolitan public libraries that are a part of the Regional Library System. These libraries had a total of \$4,782,217 in local monies for materials in 2015 - \$1.12 per capita. The 71 libraries serving populations of less than 10,000 people only had \$218,923 in local funds for materials - \$0.70 per capita. The *Materials for the Disadvantaged* funds provided an average of \$0.11 per capita in additional materials monies for all of the participating non-metropolitan libraries.

Library staff were encouraged to use the funds to purchase materials that met local needs. Based on reports from a sampling of libraries from across the state, the majority of funds were spent on large-print materials, materials to support Head Start and day

care early literacy programs, and materials used with outreach programming in local schools. Some library staff also reported that they used their funds to buy adult literacy materials and resources to support outreach services to programs that serve the mentally challenged.

2. Tennessee Electronic Library (TEL)

LSTA Expenditures FFY 13-FFY 15: \$2,510,352 (27.24% of Total LSTA Expenditures)

There were three objectives for this program and they related to all of the TEL databases and not just those funded by LSTA. There were challenges with the targets or data in each of the objectives. As a result, it is difficult to measure the progress toward achieving the objectives.

Objective 1: TEL usage will increase by 10% each year from 2013-2017. This objective did not specify what "TEL usage" would increase: sessions, searches, or full-text retrievals. *The objective was exceeded for full-text retrievals, which increased by almost 50% between FFY 2014 and FFY 2015 and by more than 68% between FFY 2015 and FFY 2016. Although sessions and searches increased between FFY 2014 and FFY 2015, they decreased between FFY 2015 and FFY 2016.*

All Databases

Only two of the databases included in TEL provided data on searches, sessions, and full-text retrieval: Gale Research and World Book. The remainder of the databases provided one or two types of data, depending on the database and how the information in the database was intended to be used. As a result, all of the data on annual increases are incomplete.

Based on the available data, there were increases in sessions, searches, and full-text retrievals between FFY 2014 and FFY 2015. There were large decreases in sessions and searches between FFY 2015 and FFY 2016, but the number of full-text retrievals increased by over 68% (Table 1).

Table 1: Database Use

	FFY 2014	FFY 2015	% Change	FFY 2016	% Change
Sessions	20,121,466	25,062,228	24.55%	10,812,988	-56.86%
Searches	40,103,678	43,965,972	9.63%	29,374,628	-33.19%
Full Text Retrieval	6,953,801	10,407,162	49.66%	17,498,191	68.14%

Five databases provided information about full-text retrieval. In FFY 2016, nearly 62% of full-text retrievals occurred on Ancestry, almost 23% came from World Book, and over 14% come from Gale Research (Table 2).

Table 2: Percent of Full Text Retrieval by Database

	FFY 2014	% of Use	FFY 2015	% of Use	FFY 2016	% of Use
Ancestry	1,853,917	26.66%	5,207,622	50.04%	10,814,486	61.80%
Gale	3,099,054	44.57%	2,499,355	24.02%	2,551,948	14.58%
Learning Express	58,614	0.84%	59,560	0.57%	67,723	0.39%
Tennessean	35,298	0.51%	63,348	0.61%	49,245	0.28%
World Book	1,906,918	27.42%	2,577,277	24.76%	4,014,789	22.94%
Total	6,953,801		10,407,162		17,498,191	

LSTA-Funded Databases

Gale Research costs \$833,333 per year and is the only database fully funded with LSTA monies. There is data on sessions, searches, and full-text retrievals for Gale Research. The data for sessions and searches mirrors the data in Table 1. Searches and sessions increased in FFY 2015 but decreased significantly in FFY 2016. However, the data on Gale full-text retrievals does not reflect the same trends as the data for full-text retrievals from all TEL databases. Full-text retrievals from all TEL databases increased by over 150% between FFY 2014 and FFY 2016, but full-text retrievals from Gale Research during that same period decreased by 17.65% (Table 3). Between FFY 2014 and FFY 2016, the average cost per full-text retrieval of Gales Research items was \$0.31.

Table 3: Gale Research Database Use

	FFY 2014	FFY 2015	% Change	FFY 2016	% Change
Session	18,930,323	23,728,131	25.34%	9,935,586	-58.13%
Search	31,668,717	35,606,547	12.43%	18,010,974	-49.42%
Full-Text	3,099,054	2,499,355	-19.35	2,551,948	2.10%

These TEL usage trends are similar to the trends being reported by other statewide electronic libraries. These trends are at least partially caused by changes in the way usage is counted and a shift away from federated search technologies to web-scale discovery services.

- In January 2014, Gale changed the way that that usage was counted to conform to the COUNTER 4 industry standards. "Prior to January 2014, retrievals and full-text retrievals included those from federated search engines. When a federated search engine searches Gale resources, it logs a retrieval for each article it brings back to the user, regardless if the user clicks to view the article. Implementing COUNTER 4 compliance removed all retrievals from federating searches and thus only counts retrievals which the user clicks to view and any retrievals from the native Gale interface of any given resource.

"State level stat reports are trending downward although we know the usage (based on our royalty payments) is increasing. Our belief is twofold: Discovery Layer particularly at Academic level and improved interface design. " – Email from Gale Research (1/25/17)

As discovery services become more commonplace, there are significant impacts on usage at the state-level due to several factors. A discovery service already contains indexed content stored on a local server, and therefore performing a search within the discovery service will not produce retrievals, sessions or searches until the user clicks into the native Gale interface to view an article or perform a new search."¹

Objective 2: 80% of TEL workshop participants will indicate positive benefits from the training. *Based on a visual scan of nearly 500 untabulated paper evaluations, this objective was exceeded.*

As can be seen in Table 4, 184 training programs were held across the state during the three years for which there is data, with a total attendance of 5,800.

¹ Gale Cengage Learning, *Tennessee Electronic Library Usage Reporting Narrative To Supplement and Support Usage Statistic Reports from 2014 – 2015.*

Table 4: TEL Training Programs

	Number of Training Programs and Outreach Events	Number of Attendees
FFY 2014	46	1,149
FFY 2015	54	1,299
FFY 2016	84	3,352
TOTAL	184	5,800

Evaluations were collected at each of the training programs, but they have not been tabulated. The evaluation form did not ask the training participants if they “received positive benefits from the program.” However, the form did ask the participants to indicate if the training was “practical to my needs and interests.” Based on a visual scan of nearly 500 paper evaluations, the vast majority of the participants agreed that the training met their needs and interests.

“Effective demonstrations to give me a great overview of what’s in TEL and I feel motivated to learn more!” – TEL Training Participant

Objective 3: 90% of TEL users surveyed will indicate the benefits of TEL. *This objective was not met during the three years covered in this report. There were no surveys of TEL users conducted during the reporting period.*

3. Matching Technology Grants to Libraries

LSTA Expenditures FY 13-FY 15: \$649,566 (7.05% of Total LSTA Expenditures)

Objective 1: Provide 50/50 matching technology grants each year from FY 2013 through FY 2017. *This objective was achieved.*

TSLA awarded a total of 367 matching technology grants to public libraries between FFY 2014 and FFY 2016. During that time, the number of computers with Internet access in public libraries increased from 7,411 to 7,689 (Table 5).

Objective 2: Reach or surpass 1 computer per 1,000 population in Tennessee’s public libraries. *This objective was exceeded.*

The number of computers per 1,000 population increased slightly between FFY 2014 and FFY 2016, from 1.14 to 1.17 (Table 5). Without this grant program, the public’s access to the Internet in Tennessee public libraries would be more limited.

Table 5: Computers/Population Ratio

	FY 2014	FY 2015	FY 2016
Number Computers with Internet access	7,411	7,451	7,698
State Population	6,496,130	6,547,779	6,600,299
Number Computers Per Thousand Population	1.14	1.12	1.17
Percent of grant applications awarded	99%*	100%	100%
Number of libraries receiving grants	103	138	127

* One library dropped out of the process after receiving a grant award

4. Network Services Consultants

LSTA Expenditures FY 13-FY 15: \$1,535,788 (16.66% of Total LSTA Expenditures)

Objective: This program will successfully resolve 90% of all computer concerns/issues within one week of the initial request for assistance. *This ambitious objective was partially achieved, and there was improvement every year.*

During FFY 2014, 75% of the concerns/issues were resolved in less than one week. That percent increased to 76% the next year, and 79% during FFY 2016 (Table 6).

While response time is an important measure, it is not the only thing to consider when evaluating this program. The program provides a critical service for the staff in many small and mid-sized public libraries in Tennessee. Technology has become an integral part of every public library and maintaining that technology can be challenging.

Prior to July 2013, staff in each of the nine regional libraries provided basic IT support for the public library staff in their regions. The regional staff had varying levels of training and expertise and, as a result, local library technical support was uneven across the state. In an effort to address this issue, TSLA used LSTA monies to fund a Network Service Manager and four Network Service Consultants. The Network Services staff provided advanced technical support to staff of both the regional libraries and local public libraries as needed.

In mid-July 2013, TSLA reorganized the Network Services unit to create a larger pool of specially trained information technology support staff. In addition to the four centrally located Network Services Consultants, one staff member from each region was reassigned to the Network Services unit, although they continued to be funded with state monies and to work in their respective regions. The nine regional Network Services staff who work in the regional libraries were given advanced training. They are now part of a 14 person unit that works together to provide technical support statewide.

“Upon the creation of the IT Call Center, assistance was literally right at my fingertips! In the not-so-distant past, I called the region and immediate help may or may not have been available. It has meant so much to be able to resolve some tech issues in a matter of minutes versus days or weeks. In most instances, we need not tell a patron or customer, ‘I’m sorry; I can’t help you. The computer is down.’ Generally, a fix is forthcoming soon via a call to the everyday heroes on the Help Desk!!” – Library Director

As a part of this reorganization, a Help Desk was established to provide telephone support to staff needing assistance. All 13 staff members and their manager take turns working on the help desk, where they responded to over 4,000 requests for assistance in each of the past two years (Table 6).

Table 6: Network Services Help Desk Response Time

	FFY 2014	FFY 2015	FFY 2016
Received	1,583	4,144	4,046
Completed in less than 24 hours	48%	50%	49%
Completed in less than 1 week	75%	76%	79%

The Network Service Consultants efforts are appreciated by the people they help. Each year, public library staff are encouraged to submit voluntary evaluations of the help they received, and each year at least 95% of the respondents said the services they received were “Excellent.”

5. Statewide Integrated Library System (VERSO)

LSTA Expenditures FY 13-FY 15: \$29,590 (0.32% of Total LSTA Expenditures)

Objective: By 2017, this initiative will reduce the number of Tennessee public libraries operating with either a non-supported ILS or no automation system by 25%. This reduction will include both libraries migrating to the statewide ILS and libraries migrating to any other ILS. *This objective was exceeded.*

VERSO provides consortial access to a hosted integrated library system (ILS) that gives public libraries an affordable alternative to a single-library ILS contract. The average cost for a library to migrate to VERSO is \$5,486; a comparable ILS purchased with a sole-library contract costs approximately \$10,000.

In October, 2013, there were 14 libraries with non-supported automated systems and another 21 with no ILS at all. By 9/30/14, there were only four libraries with non-supported automated systems and 10 libraries with no ILS, a reduction of 40%. Since these numbers did not change during FFY 2015 or FFY 2016, it is unlikely that remaining libraries will add an ILS until there is a change in local library leadership at the director or board level.

This program provided critical support for smaller libraries that might otherwise not have been able to afford to purchase and maintain an ILS, both in terms of startup costs and technical support and assistance. Support included training and financial assistance for some public libraries to alleviate year-one costs. TSLA staff coordinated training activities with the VERSO vendor to ensure that library staff had the skills needed to use the system effectively.

Although VERSO is used primarily by smaller public libraries, those libraries accounted for approximately 30% of the public library circulation in Tennessee during the three covered in this report (Table 7).

Table 7: VERSO Circulation

	Total Public Library Circulation	VERSO Circulation	%
FFY 2014	25,973,237	8,242,904	31.74%
FFY 2015	23,649,871	7,830,626	33.11%
FFY 2016	22,919,051	7,035,893	30.70%

6. Statewide Union Catalog (ShareIt)

LSTA Expenditures FY 13-FY 15: \$1,808,689 (19.62% of Total)

Objective: For Fiscal Years 2013-2017, provide a statewide catalog of the holdings of all public libraries in Tennessee, with electronic access to the holdings of several academic libraries. *This objective has been fully achieved.*

This program includes three components: ShareIt, the Bibliographic Services Coordinator, and the purchase of "MARC Magician," software that used to create and manipulate MARC records by staff in the nine regional libraries.

ShareIt

ShareIt is Tennessee's statewide union catalog. ShareIt is an Auto-Graphics product and was called AGen until a 2016 vendor upgrade. ShareIt contains 66% of the holdings of 187 public libraries, plus the holdings of three university libraries, and one school library for a total of 8,892,205 bibliographic records in FFY 2016.

ShareIt is the primary means used to manage ILL transactions by many of the public libraries in eight of Tennessee’s nine library regions. The ninth region has an intraregional ILL system and only uses ShareIt if a request cannot be filled by a library within the region. The four metropolitan public libraries use OCLC for their own ILL requests, but use ShareIt to fill ILL requests from other Tennessee public libraries that do not use OCLC. ShareIt is also used as a cataloging resource by the staff of many small and mid-sized public libraries.

Two ILL surveys were completed during the period covered by this report. In 2014, 102 people completed the *Tennessee Interlibrary Loan Survey* and in 2016, 147 completed the *Tennessee Statewide Catalog/ Interlibrary Loan Survey*.

In 2016, 70.0% of the survey respondents said they used ShareIt for cataloging and 95.38% of the respondents reported using it for ILL. (The 2014 survey did not ask respondents about cataloging.) Library staff have to login to ShareIt and search for bibliographic records for both purposes.

ShareIt logins and searches fluctuated between FFY 2014 and FFY 2016. Logins decreased by 12% one year and increased by 12% the next year. Searches increased by 12% one year and then decreased by 10% the next. The net effect was little change in use between FFY 2014 and FFY 2016 (Table 8).

Table 8: ShareIt Logins and Searches

	FFY 2014	FFY 2015	% Change	FFY 2016	% Change
Logins	367,385	322,052	-12.34%	363,859	12.98%
Searches	797,988	895,127	12.17%	804,295	-10.15%

During the same period, ILL transactions on ShareIt increased, as did the percentage of overall of ILL transactions that took place on ShareIt (Table 9).

Table 9: ShareIt ILL Transactions

	FFY 2014	FFY 2015	% Change	FFY 2016	% Change
ShareIt ILL Transactions	38,159	40,365	5.78%	45,025	11.54%
Total ILL Transactions	159,164	167,362	5.15%	177,223	5.89%
% of ILL on ShareIt	23.97%	24.07%		25.41%	

The respondents to both the 2014 and 2016 surveys were asked to rate their satisfaction with the statewide union catalog (AGent in 2014 and ShareIt in 2016) ILL services using a scale of 1 (Highly Satisfied), 2 (Satisfied), 3 (Dissatisfied), or 4 (Highly Dissatisfied). Overall satisfaction increased from an average of 1.71 in 2014 to an average of 1.40 in 2016.

“We are pleased with the way ILL works and, nearly always, if we do not have what the patron wants, we offer to get it from another library. The courier service is especially great!” – 2016 ILL Survey Respondent

In the 2016 survey, respondents were also asked to use the same scale to rate their satisfaction with ShareIt as a cataloging aid. Overall satisfaction with the process of using ShareIt to catalog was an average of 1.79. This is somewhat lower than the respondents’ satisfaction with ShareIt ILL services, but still indicates a high degree of satisfaction.

Bibliographic Services Coordinator

The Bibliographic Services Coordinator position is a part of this program. This staff person serves as liaison with Auto-Graphics, the current vendor for the statewide catalog, and offers cataloging training assistance for local regional and public libraries. She is the state's cataloging expert and provides cataloging assistance to both public and regional librarians. She is the project manager for the *Matching Technology Grants to Libraries* program, the statewide courier system, and interlibrary loan assistance to local public libraries and regional libraries.

Cataloging Support

This program also provides MARC Magician software to catalogers in the nine regional libraries.

7. Interlibrary Loan Assistance: Group Access Capability (GAC)

LSTA Expenditures FY 13-FY 15: \$5,843 (0.06% of Total LSTA Expenditures)

Objective: Increase the use of Interlibrary Loan assistance by 10% by FFY 16. *This objective was not achieved.* The objective was unrealistic and this program should not have been a separate stand-alone program. It is an integral part of providing ILL services to Tennessee residents and should have been included with ShareIt as a part of the overall program designed to address all aspects of ILL.

"Group Access Capability (GAC) organizations are ad hoc associations of libraries united by subject matter, geography or another attribute. Through WorldShare ILL, GAC group members have access to each other's bibliographic, location and summary holdings records."² Although the objective appears to refer to increasing the use of all ILL assistance by 10%, this program only funds the WorldCat GAC accounts in two regional libraries. Therefore, only the data from those accounts has been used to evaluate this program. There is information about overall ILL use in the evaluation of ShareIt above.

Public library staff in Tennessee are encouraged to refer ILL requests that cannot be filled through ShareIT to one of the two regional libraries with GAC access to WorldCat. Regional staff then use WorldCat to request the item from an out-of-state library.

Both the number of ILL requests that were received and the number of ILL requests that were filled by the two regional libraries with GAC access to WorldCat declined over the three years for which there is data (Table 10). The percentage of requests that were filled also decreased.

Table 10: Regional World ILL Transactions

	FFY 2014	FFY 2015	% Change	FFY 2016	% Change
ILL Requests	1,273	1,260	-1.02%	1,258	-0.16%
ILL Requests Filled	977	983	0.61%	928	-5.60%
Percent Filled	77%	78%	1.65%	74%	-5.45%

There were two ILL surveys done during the period covered by this report, one in 2014 and one in 2016. One hundred percent of the 102 respondents to the 2014 survey and 99% of the 147 respondents to the 2016 survey said they used the statewide union catalog (AGent in 2014 and ShareIt in 2016) for ILL. In contrast, only about one third of the respondents said that they sent ILL requests that could not be filled in-state to one

² "WorldShare Interlibrary Loan, Resource sharing groups," OCLC.org, accessed January 19, 2017, <https://www.oclc.org/en/worldshare-ill/features/groups.html>.

of the two regional libraries with GAC access to the OCLC WorldCat. Although awareness of service increased by 9% between 2014 and 2016, use increased by just 4%. Nearly 50% of the respondents who are aware of the service did not use it in 2016 (Table 11). There was no data in either survey to explain why library staff chose not to use WorldCat to request out-of-state items.

Table 11: Regional WorldCat Users

	Used GAC	Did not use GAC	Not aware of service
FFY 2014	33%	44%	23%
FFY 2016	37%	48%	14%

8. Tennessee Library for the Blind and Physically Handicapped (LBPH)

LSTA Expenditures FY 13-FY 15: \$212,007 (2.3% of Total LSTA Expenditures)

Objective: By 2017, the quality of life for Tennesseans with print disabilities will be enhanced through the provision of specially formatted materials. *This is a subjective measure, but based on the responses from the 2016 LBPH survey, the people who use LBPH are very positive about services they receive.*

This program pays salary and benefits for one full-time Reader Advisor. Funds were also used to purchase large-print books to supplement the braille and audio materials provided through the National Library Service for the Blind and Physically Handicapped/ Library of Congress. In addition, LSTA funds were used for outreach services, travel, and equipment.

“My mother uses this service and it has been a blessing. She anxiously awaits the books. For the first time in 10 years she has something to look forward to every day. I can’t begin to tell you how grateful we are for this service!” – Adult Child of a LBPH User

LBPH customers use the library’s resources heavily, and they are very positive about the library’s services and the help they receive from the library’s staff. In FFY 2016, LBPH staff purged inactive and withdrawn patron accounts and weeded the descriptive video and cassette audiobook collections. The number of customers was reduced by nearly half and the number of items was reduced by 8%. In the same year, circulation increased by 16% and the average annual circulation per customer was an impressive 68.5 items (Table 12).

Table 12: LBPH Customer and Use Data

	FFY 2014	FFY 2015	% Change	FFY 2016	% Change
Customers	8,989	8,542	-4.97%	4,436	-48.07%
Items owned	191,260	192,015	0.39%	191,182	-0.43%
Circulation	285,006	262,864	-7.77%	303,937	15.63%
Circ. per Customer	31.7	30.8		68.5	

Four hundred and fifty-seven people completed the 2016 LBPH survey. The respondents were a combination of the people who were able to use LBPH services on their own and the caregivers of people who needed assistance to use the service. The respondents were positive about the services they received and the assistance provided by staff. Only five people (1.09%) rated the services provided by LBPH as “Fair” and no one said it was

“Poor.” The survey respondents were even more positive about the quality of help provided by the staff (Table 13).

Table 13: Responses to the Question “When you contact the library, do you receive the help or information you request?”

Always	375	85.03%
Usually	58	13.15%
Sometimes	7	1.59%
Almost Never	1	0.23%
No Answer	16	3.5%
Total	457	

“I cannot read well enough to pick out the tapes and I ask the staff to pick out the books for me and they always send me good ones... Thank you for being there for people like me.” – LBPH Survey Respondent

9. Courier Service

LSTA Expenditures FY 13-FY 15: \$0

The program was moved to state funding after the *Tennessee State Library and Archives Library Services and Technology Act Plan 2013-2017* was submitted.

Goal 2: All Tennessee residents will have the reading skills, information resources, and library services needed to succeed in school, at work, and in their daily lives.

The objective for the program in this goal at two targets; one was exceeded and one was partially achieved.

1. R.E.A.D.S

LSTA Expenditures FFY 13-FY 15: \$680,888 (7.39% of Total LSTA Expenditures)

Objective: By 2017, patrons of libraries participating in the Tennessee Regional Library System will have access to a collection of digital audio, ebook, music, and film titles that has grown by 50% and will increase their usage of this collection by 75%. *The first target in this objective was exceeded and the second was partially achieved.*

R.E.A.D.S. uses the Overdrive digital download platform to provide materials to library users in Tennessee’s 91 non-metropolitan counties.

“I love libraries. But I have to admit that with my hectic schedule, using READS is fast, easy, and so convenient. (Especially when I finish a book at ends with a cliffhanger and I HAVE TO get my hands on the next book at 2 AM.) Librarians are Superheroes! (But without capes.) Keep up your amazing work!” – READS Survey Respondent

This is a very successful program that has seen substantial growth during the reporting period. At the beginning of FFY 2014, the collection had 85,734 items. At the end of FFY 2016, the collection had grown to 156,629 items, an 83% increase (Table 14).

Table 14: R.E.A.D.S. Collections

Format	FFY 2013	FFY 2014	% Change	FFY 2015	% Change	FFY 2016	% Change
Audiobooks	24,629	31,054	26.09%	36,919	18.89%	44,418	20.31%
Ebooks	50,092	79,902	59.51%	91,942	15.07%	107,426	16.84%
Videos	0	2,360		2,626	11.27%	2,655	1.10%
Magazines	0	0		0		113	
TOTAL	74,721	113,316	51.65%	131,487	16.04%	154,612	17.59%

The objective for this program identifies audio, ebook, music, and film titles as a part of the R.E.A.D.S. collection. However, in view of the many inexpensive and free music streaming services and the extremely high demand for audiobooks and ebooks, staff decided not to add music to the collection. In FFY 2014, staff added a small collection of video titles, but the titles were not used frequently and the collection is being phased out.

Although the collection has increased by 83% in the past three years, demand for ebooks and audiobooks far exceeds the supply. Several years ago, the R.E.A.D.S. Overdrive account was set to automatically purchase a new copy of a title when there were more than five people waiting for each copy. Currently, the account is set to add a new copy of a title when the tenth reserve is placed. Even with that much higher threshold, the cost of buying additional copies of titles with ten holds is approximately \$40,000 a month.

During FFY 2014, the total R.E.A.D.S. circulation was 1,586,777. During FFY 2016, the total circulation had grown to 2,569,176, an increase of 62% (Table 15). This was below the target of a 75% increase. The FFY 2016 turnover rate for R.E.A.D.S. materials (the average number of time each item is checked out) was 16.6. R.E.A.D.S. allows a three-week loan period. Based on that, circulation is almost at capacity. If everyone took advantage of the three-week loan period, all R.E.A.D.S. materials would be checked out 49.8 weeks a year. The only way to increase circulation will be to increase the size of the collection or reduce the length of the loan period, or some combination of both. If one or both of those change are made, the increase in R.E.A.D.S. circulation will exceed the target by the end of this Five-Year Plan.

Table 15: R.E.A.D.S. Circulation

	FFY 2014	FFY 2015	% Change	FFY 2016	% Change
READS	1,586,777	2,077,789	30.94%	2,569,176	23.65%
Public Library	15,331,101	14,042,752	-8.40%	16,038,649	14.21%
% of Public Library Circulation	10.35%	14.80%		16.02%	

In 2013, the R.E.A.D.S. staff surveyed R.E.A.D.S. users. The SurveyMonkey survey was open for one month and 698 people responded. In 2016, R.E.A.D.S. staff again surveyed R.E.A.D.S. users with the same survey instrument. The 2016 survey was open for one week and 2,924 people responded.

During the interview with the R.E.A.D.S. project manager, she said that one of the key findings in both surveys was the number of people who use R.E.A.D.S. but rarely or never visit a library, a trend that accelerated between 2013 and 2016 (Table 16). She went on to say that librarians have been trying to find ways to provide meaningful services to people who don't use traditional library services for many years. R.E.A.D.S. seems to be reaching some of those people. What the survey didn't ask was how many people have stopped going to their local libraries and are using R.E.A.D.S. instead. That would be an interesting question to add to the next R.E.A.D.S. survey.

Table 16: Responses to the Question "Which statement best describes your use of the library?"

	2013	2016
I visit the physical library but I am new to READS.	8%	4%

I visit the physical library and I use READS.	48%	45%
I rarely or never visit the physical library but I use READS.	44%	51%

A comparison of the 2013 and 2016 surveys illustrates the change in how people listen and read downloadable materials, particularly audiobooks. The use of desktops and dedicated devices is down and the use of smartphones and tablets is up (Table 17).

Table 17: Devices Used to Listen/Read R.E.A.D.S. materials

	Listen		Read	
	2013	2016	2013	2016
Desktop	30%	14%	22%	16%
MP3 Player	57%	22%	-	-
E-Reader	-	-	39%	29%
Smartphone	46%	67%	31%	33%
Tablet	16%	30%	60%	68%

The survey data also indicated that the average age of R.E.A.D.S. users is increasing. In 2013, 27% of the survey respondents said they were older than 60. In 2016, 45% of the respondents said they were over 60. This shift has implications for collection development and for marketing the service.

The final question in the survey asked respondents to “provide any other feedback about READS that you think will be helpful to us.” Forty percent of the survey respondents - 1,160 people - provided feedback. Four themes emerged from the comments:

- Twenty-eight percent of the people who responded to the survey wanted to say how much they valued the service.
- Overdrive had just completed an update to the site when the survey was released. Of the 30% of respondents who mentioned the update, 26% had problems with it and 4% thought it was an improvement.
- Thirteen percent said they found using Overdrive cumbersome but did not mention the update.
- Twelve percent wanted R.E.A.D.S. to buy more copies to reduce the hold time.

“Dear READS, Honestly, I don't know what I would do without you! My quality of life would certainly be greatly diminished. I hope you will continue to do good work - to always look for ways to make improvements and technological advancements, & to be available to answer questions & provide assistance. Along with this survey, I'm sending my heartfelt appreciation to everyone involved in the READS program.” – READS Survey Respondent

Goal 3: All Tennessee residents will benefit from enhanced library and information services because library staff members have the knowledge, skills, and competencies to offer high-quality 21st century library services.

This goal has been partly achieved. There were three programs under this goal: one exceeded its objectives; one achieved its objectives, and one partially achieved its objectives.

1. Continuing Education Summit

LSTA Expenditures FY 13-FY 15: \$3,466 (0.04% of Total LSTA Expenditures)

Objective: By 2015, the Tennessee State Library and Archives will host a Continuing Education Planning Summit, partnering with other Tennessee library stakeholders to develop a core competencies program and five-year training agenda for public libraries. *This objective was partially achieved.*

The Continuing Education Summit was held on March 12-13, 2015 at the Buffalo River Regional Library. Although the original intent was to partner with other Tennessee library stakeholders, all of the attendees were TSLA staff members: the State Librarian and Archivist, the Planning and Development unit staff, and the Regional Library Directors and the Assistant Directors.

This summit resulted in the *Continuing Education Plan, FY 2016-2019*. The plan identified 25 public library staff competencies and included a five year schedule for presenting training on those competencies. The priorities in the plan were used as guidelines for regional training programs in 2016 (see Table 18 below).

The CE Coordinator who managed this program is no longer in the position. A new CE Coordinator has been hired and she is working with staff from the regional libraries to review the plan, make revisions as needed, and continue to implement a competency-based training program for library staff and trustees in the Tennessee.

2. Staff Development

LSTA Expenditures FY 13-FY 15: \$23,681 (0.25% of Total LSTA Expenditures)

Objective: TSLA and its regional library system will provide a core competencies-based continuing education program for regional and public library staff and trustees that addresses the needs of the 21st century library environment. *This objective was achieved.*

During the three fiscal years covered in this report, staff in the nine regional libraries have provided 423 training programs (1,284* hours of training) for nearly 7,000 regional and public library staff and trustees (Table 18).

Table 18

	FFY 2014	FFY 2015	FFY 2016	TOTAL
Number of Training Programs	103	151	169	423
Total Number of Hours of Training*	191	557	536	1,284
Total Number of Attendees	2,206	2,131	2,359	6,696

* Four regional libraries did not report hours in 2014.

The regional training programs described above were funded with state monies, but the training topics in 2016 were guided by the *Continuing Education Plan, FY 2016-2019*.

The LSTA monies in this program were used to: provide access to WebJunction training materials for staff from all types of libraries in Tennessee; pay for AdobeConnect web conferencing software; pay for Versal, an online e-training design site; and support to LibGuides, a collection of resources for projects and services that are offered by the TSLA Planning and Development team.

Between the beginning of FFY 2014 and the end of FFY 2016, TSLA staff used Adobe Connect to present 57 online training programs to a total of 1,928 staff members. There were 4,219 views of the Online CE Calendar and LibGuides were viewed 43,736 times.

3. Technology Enhancements for TSLA's Public Library Support System

LSTA Expenditures FY 13-FY 15: \$196,184 (2.13% of Total LSTA Expenditures)

Objective: Each year, at least 50% of library technology needs outlined in the Information Systems Plans for the regional libraries and the Planning and Development staff of TSLA will be purchased with LSTA funds. *The objective was exceeded.*

During each of the years covered in this report, 100% of the requested items were purchased. TSLA staff report that "this equipment allowed us to function with 4.5 or 5 staff members per region, following a 40% staff reduction in July 2012. Of necessity, individual productivity and efficiency had to improve to compensate for the lost staff. Without current and reliable tools, the Regional Library program could not have continued to earn such high marks from libraries statewide."

A-2. NATIONAL PRIORITIES AND FOCAL ISSUES

The three goals in Tennessee Five-Year Plan supported three of the national priorities associated with the Measuring Success focal areas and their corresponding intents: Information Access; Lifelong Learning; and Institutional Capacity.

Focal Area: Information Access

Intent: Improve users' ability to discover information resources

Intent: Improve users' ability to obtain and/or use information resources

Bibliographic Access and Resource Sharing: "[T]oday's library catalogs are founded on predictable and consistent record and heading structures, which facilitate serendipitous discovery, efficient known-item retrieval and many ways to browse."³ MARC records are the building blocks of an effective library catalog and an efficient interlibrary loan process. TSLA has used LSTA monies to support and improve bibliographic access and resource sharing during the three years covered in this report.

- The state union catalog, ShareIt, contains 66% of the holdings of 187 public libraries, plus the holdings of three university libraries, and one school library; a total of 8,892,205 records in FFY 2016.

ShareIt is used as both as a cataloging resource and as the primary tool for ILL activity in the state. Seventy percent of the library staff responding to the 2016 *ShareIt Survey* indicated that they use ShareIt as a cataloging resource, usually by adding a local library code to an existing record. ShareIt records can be downloaded and imported into local integrated library systems, ensuring that Tennesseans have access to current holdings information in their local libraries. (Goal 1, Program 6)

- Libraries also use ShareIt as their primary interlibrary loan (ILL) resource. During the three years included in this report, 45,025 items were requested through ShareIt ILL. Two regional GACs provide access to the OCLC WorldCat for items that are not available through ShareIt. (Goal 1, Programs 6 and 7)
- Many public libraries in Tennessee are small and poorly funded. The resources in ShareIt are of no value to a library that does not have an integrated library system (ILS). In October, 2013, 35 public libraries either had no ILS or were operating a

³ OCLC, *Online Catalogs: What Users and Librarians Want* (Dublin, Ohio: OCLC, 2009) 1

non-supported ILS that could not interface with AGen, the statewide union catalog. In the past three years, LSTA monies have been used to coordinate a statewide contract that allows local public libraries to purchase of VERSO, an integrated library system, at a reduced rate. The number of public libraries with no ILS or an unsupported ILS has been reduced to 14, a 40% decrease. (Goal 1, Program 5)

Online Databases: Online databases provide an easy way for users to search for information across a variety of resources and to view or download the information they find.

- The Tennessee Electronic Library (TEL) provides all Tennesseans with access to a variety of databases that are used to discover information resources that support their formal learning, help them to discover their family heritage, find the tools needed to seek employment, explore past issues of the Tennessean (the Nashville newspaper), learn new languages, and find answers to questions relating to health, wealth, and other personal issues. Between FFY 2014 and FFY 2016, the number of full text retrievals 6,953,801 in to 17,498,191, an increase of 152%. (Goal 1, Program 2)

Information Technology: One of the things that ShareIt, VERSO, ILL, and TEL have in common is that they are all dependent on technology: up-to-date computers and software; robust network connectivity; and skilled IT staff. LSTA monies were used to help public libraries acquire technology and to provide the technical support needed to maintain that technology.

- Matching technology grants double the ability of public libraries to purchase and maintain hardware and software needed to ensure that users have access to local and statewide materials. The 50/50 match ensures that public library directors and boards do not rely solely on LSTA funds to support their IT needs. In the past three years, TSLA has awarded 476 matching technology grants for a total of \$649,184. As a result, public libraries currently have 1.17 Internet-connected computers per 1,000 population. (Goal 1, Program 3)
- Acquiring hardware and software is just the first step. It all needs to be installed and maintained. Libraries are also increasingly dependent on robust, stable network connections. It was clear during the planning for the Five-Year plan, that local public libraries needed more IT support than they were receiving. Therefore, the Network Services unit was expanded from four consultants and a manager to include nine additional staff members, one from the each of the nine regions. The new staff were given advanced training and now all 14 Network Services staff share the responsibility for staffing the IT Help Desk and providing on-site technical support. During the past three years, the Help Desk has received 9,773 requests for assistance. Staff closed 49% of those requests in 24 hours and an additional 30% within a week. (Goal 1, Program 4)

Materials for Special Populations: Some segments of the population have special needs that require unique collections. LSTA monies were used to purchase materials for disadvantaged populations and to provide staff and materials for the Tennessee Library for the Blind and Physically Handicapped.

- The Materials for the Disadvantaged program provided materials for special audiences served by the 170 public libraries that are a part of the Regional Library System and the four metropolitan public libraries. Library staff were encouraged to use the funds to meet local needs. The majority of the funds were spent on large-print materials, materials to support Head Start and day care early literacy

programs, and materials used with outreach to local schools. The Materials for the Disadvantaged funds provided an average of \$0.11 per capita in additional materials monies for all of the participating non-metropolitan libraries. The money was particularly important to the 71 libraries serving populations of less than 10,000 people. In FFY 16, they only had \$218,923 in local funds for materials – \$0.70 per capita. (Goal 1, Program 1)

- LSTA monies were used to pay the salary and benefits for one full-time Reader Advisor in the Library for the Blind and Physically Handicapped. Funds were also used to purchase large-print books to supplement the braille and audio materials provided through the National Library Service for the Blind and Physically Handicapped/Library of Congress. In FFY 2016, LBPH circulated 303,937 items, an average of 69 items for every registered user. In the 2016 LBPH Survey, users and their caregivers were asked, “When you contact the library, do you receive the help or information you request?” An impressive 85% said they always received the help or information they requested and an additional 13% said they usually got what they needed. (Goal 1, Program 8)

Focal Area: Lifelong Learning

Intent: Improve user’s general knowledge and skills

Digital Lending Collections:

- R.E.A.D.S. is the Tennessee digital library. It provides access to ebooks, audiobooks, videos, and magazines. This service has grown considerably during the three years of this report. At the beginning FFY 2014, the collection included 24,629 audiobooks and 59,092 ebooks for a total of 83,721 items. At the end of FFY 2016, the collection had grown to include 44,418 audiobooks, 107,426 ebooks, 2,655 videos, and 114 magazines, for a total of 156,629 items, an 87% increase. Use has increased significantly as well. During FFY 2014, circulation was 1,586,777. At the end of FFY 2016, the total annual circulation had grown to 2,569,176, an increase of 63%. READS circulation as a percent of total library circulation doubled during the reporting period, from 7% in FFY 2013 to 14% in FFY 2016. (Goal 2, Program 1)

Focal Area: Institutional Capacity

Intent: Improve the library workforce

Continuing Education: The library environment is changing rapidly and the skills needed to provide 21st century library services are evolving. Staff development is more important than ever.

- CE Summit: This summit resulted in the *Continuing Education Plan, FY 2016-2019*. The plan identified 25 public library staff competencies and developed a five-year schedule for presenting training on those competencies. The CE Coordinator who managed this program is no longer in the position. A new CE Coordinator has been hired and she is working with staff from the regional libraries to review and begin to implement the plan. (Goal 3, Program 1)
- Staff Development: During the three fiscal years covered in this report, staff in the nine regional libraries have provided 423 training programs for nearly 7,000 regional and public library staff and trustees. In addition, TSLA staff presented 57 online training programs to a total of 1,928 staff members. LSTA funds were used to provide access to WebJunction training materials for staff from all types of libraries in Tennessee; pay for AdobeConnect web conferencing software; pay for

Versal, an online e-training design site; and support to LibGuides, collection of resources for projects and services that are offered by the TSLA Planning and Development team. (Goal 3, Program 2)

Intent: Improve the library’s physical and technological infrastructure

Technology Enhancements for TSLA’s Public Library Support System: TSLA’s public library support system includes the staff of the Planning and Development unit and the staff in the nine regional libraries. These staff members require up-to-date hardware and software to function effectively.

- On July 1, 2012, the 12 regional library systems in Tennessee were reconfigured into nine regional systems. As a part of the restructuring, the number of regional staff members was reduced by 40%. The responsibilities for the reconfigured regional libraries were streamlined and many of the regional functions were automated. The technology enhancements purchased with these funds gave the staff in the regional libraries and the Planning and Development unit the capacity needed to provide support services to libraries of all types across the state. (Goal 3, Program 3)

A-3. TARGET AUDIENCES

Although many of the target audiences in Table 19 were served by the programs evaluated in this report, none of the audiences received 10% or more of the total amount of resources committed by overall plan across multiple years.

Table 19: Target Audiences Receiving 10% or More of Total Resources

	Yes	No
Library Workforce		X
Individuals living below the poverty line		X
Individuals that are unemployed/underemployed		X
Ethnic or minority populations		X
Immigrants/refugees		X
Individuals with disabilities		X
Individuals with limited functional literacy or information skills		X
Families		X
Children (aged 0-5)		X
School-aged youth (aged 6-17)		X

B. Process Questions

B-1. HOW DATA FROM OLD AND NEW STATE PROGRAM REPORTS AND ELSEWHERE WAS USED TO GUIDE ACTIVITIES IN THE FIVE-YEAR PLAN

The senior management team (the State Librarian and Archivist, the Assistant State Librarian who is also the LSTA Coordinator, and the Director of Regional Libraries) worked together to ensure that programs were in compliance with LSTA requirements and that the Annual Reports were completed accurately and on-time.

The State Librarian and Archivist chaired quarterly meetings of the TSLA staff members responsible for managing the programs funded by LSTA. During each meeting, staff reviewed the LSTA activities of the previous quarter and discussed the planned activities for the upcoming quarter. Each program budget was reviewed to ensure that monies were being spent in a timely manner. There has been some turnover in staff positions during the three federal fiscal years covered in this report and these meetings helped the new program managers to understand their responsibilities and the broader Five-Year Plan and reporting structure.

One of the recommendations in the evaluation of the 2008-2012 Five-Year Plan was to “develop a ‘dashboard’ for reporting data on a regular basis (daily/weekly/monthly), so that data is consistent and complete for each year and is immediately available to policy makers, program planners, and participants in Tennessee.”⁴ This recommendation was not implemented. As a result, staff generally agree that the focus of the quarterly LSTA review meetings was more on the implementation of individual activities than on collecting and tabulating evaluative data. During the evaluator’s interviews with the LSTA program managers, one of the most consistent themes was that the managers would like to have a streamlined and easily managed data collection process during the next five years.

B-2. CHANGES MADE IN THE FIVE-YEAR PLAN

The primary change in the Five-Year Plan occurred before the expenditures from the FFY 2013 LSTA award began. Originally, the intent was to fund a part of Firefly, the statewide courier service, with LSTA funds. However, the program ended up being fully funded with state monies and the LSTA funds originally budgeted for Firefly were reallocated.

B-3. WHAT LSTA DATA HAS BEEN SHARED, HOW IT HAS BEEN SHARED, AND WITH WHOM HAS IT BEEN SHARED

Information about LSTA programs and services is shared with a variety of stakeholders. As noted earlier, senior staff meet with LSTA program managers quarterly to review the activities of the preceding quarter, the activities planned for the upcoming quarter, and the program budgets.

The LSTA Coordinator uses information from these meetings to prepare reports which are presented at each quarterly meeting of the Tennessee Advisory Council on Libraries

⁴ Himmel and Wilson, *An Independent Evaluation of Tennessee’s Implementation of the Library Services and Technology Act Grants to States Program 2008-2012* (Tennessee State Library and Archives, March, 2012), 25.

(TACL) and during the quarterly meetings of the Regional Library Directors and Assistant Directors.

TSLA is a part of the Office of the Secretary State, and the State Librarian and Archivist meets with the Secretary of State regularly. Those meetings include updates on the programs and activities funded with LSTA monies.

The TEL Administrator reports to the Tenn-Share board on TEL activities regularly. Tenn-Share is an organization that includes over 300 libraries and information agencies of all types and sizes in Tennessee. Tenn-Share's primary purpose is to promote sharing of library resources, and as a result, they are interested in the TEL program.

C. Methodology Questions

C-1. SELECTION OF AN INDEPENDENT EVALUATOR

The Tennessee State Library and Archives issued *Request for Quotes: LSTA Five Year Plan Evaluation* on July 5, 2016 and received two responses. The responses were reviewed by the State Librarian and Archivist and the Assistant State Librarian and Sandra Nelson was selected to serve as the independent evaluator. Ms. Nelson has the demonstrated professional competency required to rigorously conduct the evaluation, including requisite expertise in statistical and qualitative research methods. She completed two previous LSTA Five-Year Plan evaluations, one for the Tennessee State Library and Archives (2002) and one for the Kentucky Department for Libraries and Archives (2002). She also served as an outside evaluator for six of the FINRA grants awarded by ALA and the FINRA Investor Education Foundation. In addition, she has completed evaluation projects for the Bill & Melinda Gates Foundation and the state libraries of Idaho, North Carolina, California, and Maine.

C-2. STATISTICAL AND QUALITATIVE EVALUATION METHODS USED TO CONDUCT THE FIVE-YEAR EVALUATION

Review of Existing LSTA Documents

- *Tennessee State Library and Archives Library Services and Technology Act 2013-2017*: This document included the goals and objectives for the programs to be evaluated and therefore provided the framework for this evaluation. However, the objectives for four programs were poorly defined and/or did not include measurable targets. This made it difficult to evaluate those programs.
- *Annual Reports*: The evaluator reviewed the Annual Reports for FFY 2013 and 2014 early in the evaluation process and the Annual Report for FFY 2015 when it was completed in December, 2016. These reports provided information about individual program activities, usage, and expenditures.
- *An Independent Evaluation of Tennessee's Implementation of the Library Services and Technology Act Grants to State Program 2008-2012*: This document provided historical context for the evaluation of some programs. It also included recommendations for managing and monitoring programs in the current Five-Year Plan.

Individual Program Evaluation Data Gathered Annually

Program managers had collected a variety of data about the programs for which they were responsible and all available data was reviewed. Some of the data elements were generated by digital analytic programs (TEL use, R.E.A.D.S. collection size and use, Network Services Help Desk queries and responses, LBPH user count and circulation, etc.). These data elements were considered to be reliable and valid.

Other data was collected manually. These data elements were not considered to be reliable, although they were useful in providing a general sense of a program's usage or effectiveness. For example, TEL training program evaluations were completed by nearly 500 people in the three years covered in this report. However, they were never tabulated. The evaluator scanned the evaluations and summarized what she saw, but the results are obviously not valid. Information about the regional training program

attendance was manually counted and submitted. There are no guidelines for who to include in the attendance figures, so some regions included the regional staff and presenters as attendees and others just counted the librarians being trained.

SurveyMonkey surveys were used to collect stakeholder feedback for several programs including ILL/ShareIt, R.E.A.D.S., and LBPH. These surveys were open to anyone who chose to respond during a specified period of time. The survey responses reflected the feelings of the people who responded, but there is no way to tell if the respondents were a balanced sample of programs' target audience. For example, if the 2016 R.E.A.D.S. survey had been done immediately before the Overdrive upgrade rather than immediately after the upgrade, the respondents' comments would have probably been quite different. Online surveys can only capture respondents' feelings at the time the survey is being completed.

Interviews and Meetings

The evaluator facilitated meetings of TACL and the Regional Library Directors and Assistant Directors. During the meetings, participants were encouraged to discuss the strengths and weaknesses of each of the programs funded with LSTA monies. They were also given an opportunity to prioritize the programs.

The evaluator conducted key informant interviews with the State Librarian and Archivist, the Assistant State Librarian, and the staff members who manage each of the 13 programs in the Five-Year Plan. A complete list of people interviewed can be found in Appendix B.

C-3. STAKEHOLDERS INVOLVED IN THE FIVE-YEAR EVALUATION

There are four key stakeholder groups for services funded with LSTA monies: the staff of the State Library and Archives including The Regional Directors and Assistant Directors; the members of the Tennessee Advisory Council on Libraries; library staff members who use one or more of the LSTA-funded programs; and Tennessee residents who use one or more of the LSTA-funded programs. Information from each of these key stakeholder groups has been included in this evaluation.

TSLA Staff

- **Assistant State Librarian and LSTA Coordinator:** The Assistant State Librarian and LSTA Coordinator was the TSLA liaison with the evaluator, and her assistance was exemplary. She provided all the data that was requested in a timely manner and was available to answer questions whenever she was needed. Her clear and concise Annual Reports provided the framework for this evaluation.
- **State Librarian and Archivist:** The State Librarian and Archivist met with the evaluator twice, and both meetings were productive. He has an excellent grasp of the overall LSTA program in Tennessee. His questions about the future of some of the LSTA-funded programs were valuable and helped to shape the evaluation strategies for those programs.
- **Planning and Development Staff:** The members of the Planning and Development unit are responsible for the implementation of most of the LSTA-funded programs. The evaluator met with each program manager for 30 minutes to an hour (see Appendix B for names and titles). During the meetings, the program managers answered the evaluator's questions about the data they had collected and discussed the challenges and successes of their programs. They also talked

about the changes they would like to see in the programs for which they were responsible in the next Five-Year Plan.

- Regional Library Directors and Assistant Directors: The evaluator met with the Regional Library Directors and Assistant Directors for two hours during one of their regularly scheduled meetings. The regional staff discussed the priority of the various LSTA-funded programs and how those programs affected the libraries that each region serves. In addition to assessing the individual programs, they discussed the LSTA policies and procedures. In general, they felt TSLA's management of the LSTA program was very good, although several acknowledged that local library staff would prefer not to have to complete any grant applications or submit any grant reports.

Tennessee Advisory Council on Libraries (TACL): The evaluator met with the members of TACL twice, once early in the evaluation process and again when the draft evaluation was completed.

- During the first meeting, the members of TACL met in small groups to discuss how the LSTA-funded programs had affected the libraries and users that each member represents. During the general discussion that followed, members discussed the fact that the programs were important to different constituent groups. For example, the members representing school and academic libraries felt that the TEL databases were much more important than did the members representing public libraries. There was general agreement that the LSTA program was well-managed in Tennessee and that they were kept informed about the activities in most of the LSTA-funded programs.

"The functions and responsibilities of this organization shall be those designated by the Secretary of State, and shall include:

- 1. Advise the Tennessee State Library and Archives on the development of the long-range program for library services in Tennessee.**
- 2. Advise the Tennessee State Library and Archives on policy matters in the administration of the long range program.**
- 3. Assist the Tennessee State Library and Archives in evaluating library programs, services and activities." – TACL By-Laws**

- During the second meeting with TACL, the evaluator presented the preliminary results of her work. Members found the data about the use of the various LSTA-funded programs to be of value and agreed with the evaluator's assessments. After reviewing the data, TACL members discussed the programs they would like to see included in the next Five-Year Plan.

Library Staff Members: During the three years included in this evaluation, library staff members had a number of opportunities to evaluate some LSTA-funded programs through online surveys and individual evaluations. The following surveys and evaluations were reviewed as a part of this evaluation:

- Interlibrary Loan, GAC, and ShareIt user surveys in 2014 and 2016
- Anecdotal data from selected library staff in each region about the Materials for the Disadvantaged program
- Evaluations by nearly 500 TEL training program participants from 2014, 2015, and 2016

- Library staff evaluations of the services received from the Network Services Consultants from 2015 and 2016

Members of the Public: During the three years included in this evaluation, members of the public responded to three online surveys about the LSTA-funded programs they used. The following surveys were reviewed as a part of this evaluation:

- R.E.A.D.S. surveys in 2013 and 2016
- LBPH survey in 2016

C-4. HOW KEY FINDINGS WILL BE SHARED

TSLA staff are committed to sharing the key findings from this evaluation with all stakeholders:

- The Tennessee Secretary of State, the members of TACL, and TSLA staff members will receive a copy of the complete evaluation document.
- A copy of the full report will be made available to the public on the Secretary of State's website.
- The Introduction to this evaluation has been written to serve as a standalone document and a PowerPoint presentation has been developed to support that document. These two resources will be made available to the staff in the nine regional libraries. They will be encouraged to share these resources with the staff and trustees in the public libraries in their regions.
- The TEL program manager will present the TEL findings to the board of Tenn-Share.

Appendices

- A. List of Acronyms**
- B. List of People and Groups Interviewed**
- C. Bibliographies of All Documents Reviewed**
- D. Copies Research Instruments Used**

Appendix A: List of Acronyms and Terms

CE: Continuing Education

FFY: Federal Fiscal Year

GAC: WorldCat Group Access Capability

ILL: Interlibrary Loan

ILS: Integrated Library System

IMLS: Institute of Museum and Library Services

IT: Information Technology

LBPH: Library for the Blind and Physically Handicapped

LSTA: Library Services and Technology Act

OCLC: A global library cooperative

P&D: TSLA Planning and Development Unit

ShareIt: Tennessee Statewide Union Catalog

TACL: Tennessee Advisory Council on Libraries

TEL: Tennessee Electronic Library

TSLA: Tennessee State Library and Archives

VERSO: Tennessee Integrated Library System

Appendix B: List of People and Groups Interviewed

Individual Interviews: 30 minutes to an hour each

Table 20: Individual Interviews

Date	Interviewee	Title	LSTA Program Responsibilities
1/9/17	Lisa Walker	Network Services Manager	<ul style="list-style-type: none"> ▪ Network Services Consultants Program ▪ Technology Enhancements for TSLA's Public Library Support System
1/9/17	Erin Loree	TEL Administrator	TEL
1/9/17	Christy Chandler	State Data Coordinator	Data support for Program Managers
1/9/17	Lauri Thompson	Continuing Education Coordinator	<ul style="list-style-type: none"> ▪ Continuing Education Summit ▪ Staff Development
1/10/17 and 1/19/17	Ashely Bowers	Assistant State Librarian	LSTA Administration and LSTA Coordinator
1/10/17 and 1/19/17	Jennifer Cowan-Henderson	Bibliographic Services Coordinator	<ul style="list-style-type: none"> ▪ Bibliographic Services ▪ Interlibrary Loan (GACs) ▪ Matching Technology Grants to Public Libraries ▪ Statewide Union Catalog: ShareIt ▪ Statewide Integrated Library System: VERSO
1/10/17	Lynette Sloan	Director of Regional Libraries	<ul style="list-style-type: none"> ▪ Materials for the Disadvantaged
1/10/17 and *1/18/17	Chuck Sherrill	State Librarian and Archivist	Oversight of all LSTA programs and budgets
1/18/17	Marion Bryant	Buffalo River Regional Library Director	R.E.A.D.S.
1/18/17	Maria Sochor	Director of LBPH	Library for the Blind and Physically Handicapped

Meetings with Groups

Tennessee Advisory Council on Libraries (TACL) Quarterly Meetings

- October 14, 2016, 9:30-11:30
- February 10, 2017, 9:30-11:30

Regional Library Directors and Assistant Directors Quarterly Meeting

- December 14, 2016, 3:00-4:00

Appendix C: Bibliography of All Documents Reviewed

- Gale Cengage Learning. *Tennessee Electronic Library Usage Reporting Narrative To Supplement and Support Usage Statistic Reports from 2014–2015*.
- Himmel & Wilson. *An Independent Evaluation of Tennessee's Implementation of the Library Services and Technology Act Grants to States Program 2008-2012*. March, 2012
- Institute of Museum and Library Services. *Guidelines for IMLS Grants to States Five-Year Evaluation*.
- OCLC. *Online Catalogs: What Users and Librarians Want*. (Dublin, OH: OCLC, 2009).
- OCLC "Worldshare Interlibrary Loan Resource Sharing Groups." Accessed January 19, 2017. <https://www.oclc.org/en/worldshare-ill/features/groups.html>.
- Steward, Scott. "TEL Usage: Past, Present, Future." PowerPoint Presentation. January 19, 2016.
- State of Tennessee. Secretary of State's Office. *Tennessee Public Library Statistics, 2014, 2015, 2016*. SOS.org. <http://sos.tn.gov/products/tsla/tennessee-public-library-statistics> (accessed January, 2017)
- Tennessee State Library and Archives. *Library Services and Technology Act Plan 2013-2017*, July 2012
- Tennessee State Library and Archives. *Tennessee State Program Report Summary Fiscal Year 2013*.
- Tennessee State Library and Archives. *Tennessee State Program Report Summary Fiscal Year 2014*.
- Tennessee State Library and Archives. *Tennessee State Program Report Summary Fiscal Year 2015*.

Appendix D: Copies Research Instruments

Questions Asked During Individual Meetings with LSTA Program Managers

1. Which LSTA programs do you think provide the most value to the citizens of Tennessee?
Each interviewee was given a “Forced Choice” template to use to determine which programs “provided the most value to the people who live in Tennessee” (Table 21 below).
2. Tell me more about ...
This question was different for each person and involved a review of the available data about the LSTA program being discussed. Depending on the program, questions included how the data was collected and by whom, how the data was tabulated, etc.
3. How has the data that has been collected about your program been used to make decisions about the program in the past three years?
4. What changes have been made in your program in the past three years? Why?
5. What do you think have been the greatest successes of your program in the past three years? What has made the most difference to the people who use library services in Tennessee?
6. What are the biggest challenges with your program? What are the biggest challenges with the administration of the LSTA program?
7. What changes would you like to see in your program in the next Five-Year Plan?
8. What data do you think would most effectively measure the value of your program to the people in Tennessee?

Discussion Questions from the Meetings with the Tennessee Advisory Council on Libraries

1. October 14, 2016 Meeting

The discussion began with a presentation by the evaluator that briefly described each LSTA-funded program. Then the TACL members divided into groups of three or four to discuss the following questions. After the small group discussions, the group reconvened to share their responses to the questions.

- What LSTA-funded programs do you think have been the most effective in helping local libraries provide better services to their users? Why?
- What LSTA-funded programs do you think have been less effective in helping local libraries provide better services to their users? Why?

2. February 10, 2017 Meeting

The discussion began with a presentation by the evaluator that summarized the results of this evaluation. Then the TACL members divided into groups of three or four to discuss the following questions. After the small group discussions, the group reconvened to share their responses to the questions.

- What percent of the LSTA budget should be allocated for each of the three priority areas in the next five years?

- Lifelong Learning
- Information Access
- Institutional Capacity
- What current or new programs or services would you like to see supported in each of these priority areas in the next five years?
 - Lifelong Learning
 - Information Access
 - Institutional Capacity
- What data would help you to determine if a program or service was meeting the needs of Tennessee residents?
- What data would help you to explain why LSTA funding is important to your congressman or senator?

Discussion Questions from the Meeting with the Regional Library Directors and Assistant Directors – December 14, 2016

- At the beginning of the meeting, each of 17 Regional Library Directors and Assistant Directors in attendance was given three dots (colored round stickers). Each of the eight programs under review was printed onto a separate sheet of paper. The papers were taped to a wall and the regional staff were asked to place their three dots on the three programs they thought “provided the most value to the people who live in Tennessee.” The results are below (Table 21).
- The meeting participants then discussed the strengths and weaknesses of each of the LSTA programs under review.
- The meeting concluded with a discussion of the current LSTA policies and procedures.

Table 21: Comparison of LSTA Program Priorities – Regional Library Staff and TSLA Planning and Development and Administrative Staff

Program	Regional Staff Ranking	P & D Staff/TSLA Admin Ranking
R.E.A.D.S.	1	1
TEL (Tennessee Electronic Library)	2	2
Technology Grants to Libraries	3	5
Network Services Consultants Program	4	3
Materials for the Disadvantaged	5	6
Continuing Education (CE Plan, Lib Guides, Webjunction, Adobe Connect, etc.)	6	8
ILL (GAC, Courier)	7	10
Library for the Blind and Physically Handicapped (Readers’ Advisor Position, Travel, Materials, etc.)	8 (tie)	4
Bibliographic Services (Statewide Integrated Catalog, Marc Records, etc.)	8 (tie)	7
Technology for Regions and P&D	8 (tie)	9