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ELEMENT 1: BASIC INFORMATION

### Applicant Information

1. **Library/Organization**
   - Peninsula Library System

2. **Library’s DUNS Number**
   - 037860772

3. **Internet Web Site Address**
   - http://infopeople.org

4. **Project Coordinator Name & Title**
   - Holly Hinman, Project Director

5. **Email Address**
   - hinmanh@infopeople.org

6. **Business Phone Number**
   - 626-796-0913

7. **Fax Number**
   - 626-796-7122

8. **Mailing Address**
   - PO Box or Street Address: 150 Linda Vista Avenue
   - City: Pasadena
   - State: CA
   - Zip: 91105

### Project Information

9. **Project Title**
   - Infopeople: Helping Libraries Think Differently

10. **LSTA Funds Requested**
    - $2,453,683

11. **Cash Match**
    - $296,803

12. **In-Kind**
    - $177,532

13. **Total Project Cost**
    - $2,928,018

14. **Federal Library Services & Technology Act (LSTA) Purpose** (Check one purpose which best describes the project)
   - [ ] Developing library technology, connectivity and services
   - [ ] Providing targeted services to diverse populations or persons who have difficulty accessing services
   - [X] Providing services to promote life-long learning
   - [ ] Developing public and private partnerships

15. **California’s LSTA Goals** (Check all that describe the project)
   - [X] Literate California
   - [X] 21st Century Skills
   - [X] 22nd Century Tools
   - [ ] Content Creation/Preservation
   - [X] Bridging the Digital Divide
   - [ ] Information Connections
   - [X] Community Connections
   - [X] Ensuring Library Access for All

16. **Number of persons served** (The number of persons who use or will benefit directly from this project)
    - 16,300*

17. **Congressional District(s) number**
    - All Calif. Districts

18. **Primary Audience for project** (Check at least one, maximum of three)
   - [ ] Adults
   - [X] Children
   - [ ] Institutionalized persons
   - [X] Library Staff & Volunteers
   - [X] Non/limited English speaking persons
   - [ ] People with special needs
   - [X] Pre-school children
   - [ ] Public library trustees
   - [ ] Rural Populations
   - [ ] Senior Citizens
   - [ ] Statewide public
   - [ ] Urban populations
   - [ ] Young adults and teens

19. **This signature certifies that I have read and support this LSTA Grant Application.**
    - **Director Name:** Linda Crowe
    - **Mailing Address:** 2471 Flores Street
    - **City:** San Mateo
    - **Zip:** 94403

   **Director Signature:** [Signature]
   
   **Date:** 4-3-13

*figure supplied by Daria Gunning, rounded to account for 5 non-reporting libraries.
ELEMENT 2: PROJECT BACKGROUND AND SUMMARY

Describe how this project was identified as a need, how it relates to your strategic plan, and what will be accomplished if this project is implemented. Should relate to activities in the timeline (Element 4) and include statistical info to support project. Limit to one page and use 12 point font.

Overview: Infopeople is a multifaceted project that provides continuing education for California library staff; supports other LSTA and statewide library projects; plans, coordinates, and provides logistical support for special events for the State Library; offers various kinds of technical assistance to libraries; explores library applications of new technologies; develops and shares resources and original web content; and facilitates statewide communication among libraries. The Infopeople Advisory Board has defined the mission of the Infopeople Project as being, “To improve the quality of life of the people of California by upgrading the performance and effectiveness of California libraries,” and the goal of the Project as being, “To provide the California library community with the skills, tools, and resources needed to deliver high-quality service in a rapidly changing world.” The 2013/14 work plan is consistent with the Project mission and goal and supports the California State Library LSTA Five-Year Plan, 2013-2017.

Need: Infopeople develops its work plan after a statewide needs assessment using a variety of analytical tools. This year’s work plan used data from the online survey conducted in March-April 2012, submitted with the 2012/13 grant application, and from the survey of public library directors conducted in December 2012 (Attachment #1). This was supplemented by data from 5,766 user evaluations and by input from instructors, Advisory Board members, and State Library staff. The work plan was also informed by the Pew Research Center Report, “Library Services in the Digital Age,” http://libraries.pewinternet.org/2013/01/22/library-services/, and by the IMLS strategic plan, http://www.imls.gov/assets/1/AssetManager/StrategicPlan2012-16.pdf, 21st Century Skills initiative, and latest national Public Library Report. The work plan addresses the documented strong need and support for continuing education and collateral tools/resources and technical/communications support, despite the widespread cutbacks that are almost universal at the local level. The current needs assessment indicated that the areas of great need were for training in: technology; supervision/management; new service and programming models and civic engagement; services to youth, especially school readiness/early literacy and support for and work with the school system. The instability of the library workforce has created a special need for training in basic skills for all levels of employees, from library director to page.

Work plan: The 2013/14 work plan encompasses the following components:

- A broad-based learning program that addresses needs identified by Infopeople and the State Library. Learning formats include: webinars; instructor-led asynchronous online courses; live online courses; blended instruction; virtual conferences; self-paced online instruction; screencasts; podcasts; face-to-face workshops; intensive multiday institutes. (Attachments #2-4)
- The Eureka! Leadership Program (Attachment #5), which this year will encompass the 2012 Eureka! Anniversary event in September, a Eureka! Leadership Institute in March, delivery of an online grant writing course in support of 2014 Eureka! projects, and Eurekans’ participation in the 2013 CLA Conference.
- Support for partner projects and State Library initiatives. (Attachments #6-8) Of particular note this year are the Virtual LDS that has been established as part of Infopeople, support for the new Early Learning Initiative, and reactivation of targeted training for rural libraries.
- Continued special event planning, coordination, and support. Major events this year will include the CLA Conference and a Public Library Directors’ Forum in the early spring.
- New directions include a partnership with the Rancho Cucamonga Public Library to support a second year of the Staff Innovation Fund Project (Attachment #13) and a planned California Library Leaders Memory Project (Attachment # ).

Outputs: Based on 2012/13 participation statistics and on the results of the needs assessment, approximately 21,000 library staff members will in 2013/14 participate in over 150 Infopeople webinars, workshops, online courses, and special events. Over 90% of those participating in these learning events will report increased knowledge and skills as a result of their participation. See Element 3 C for other project outputs.
ELEMENT 3: PLANNING AND EVALUATION

Please answer each area concisely and completely. Limit to two pages and use 12 point font.

A. Project Purpose – Short statement which answers the questions: we do what, for whom, for what expected benefit. Infopoeple is a multifaceted project that provides continuing education for California library staff, supports other LSTA and statewide library projects, offers various kinds of technical assistance to libraries, explores library applications of new technologies, develops and shares resources and original web content, and facilitates statewide communication among libraries. Infopoeple addresses the need of California library staff at all levels for skills, knowledge, attitudes, and tools sufficient to provide excellent library services. Benefits include demonstrated staff and public skills acquisition and improvement, documented improvement in library services as a result of training, initiation of new library services, creation of extensive and publicly available online resources, and leadership in library applications of new technologies.

B. Project Activities/Methods – How will the project be carried out? Include major activities from the timeline. The 2013/14 work plan has the following five broad components:
1. The heart of the Project is a comprehensive statewide continuing education program for all levels of library staff. This program, developed after extensive needs assessment described in Element 2, will provide over 150 learning opportunities covering more than 92 topics (see Attachment #2). The 2013/14 training calendar includes topics in areas of need identified by library directors and staff (notably technology, supervision/management, new service models and programming, and core library skills) and also addresses areas that relate to public expectations for libraries as identified in the recent Pew study (services to children, school readiness and support for schoolwork, civic engagement). The current training program encompasses multiple formats (see Attachments #3-4 and Element 4) in order to accommodate different learning styles as well as time, travel, and economic constraints. These formats include webinars; instructor-led asynchronous online courses; live online courses; blended instruction; virtual conferences; self-paced online instruction; screencasts; podcasts; face-to-face workshops; intensive multi-day institutes. Of the 37 online courses planned for this year, 24 will be new, as shown in Attachment #3. Eight of the remaining courses carry LSSC certification, which means that Infopoeple is required to offer them at least once a year. All 55 webinars will be new, as will the 36 podcasts. Other offerings include a number of contract courses and workshops, at least 2 new self-paced courses, at least 22 face-to-face workshops held in conjunction with partners such as UC Davis, and a virtual conference co-sponsored with Califa.
2. The second component is the Eureka! Leadership Program, centered around the flagship of the Eureka! Leadership Institute (see details in Attachment #5). The Institute is an intensive six-day residential event designed to prepare a new generation of California library leaders. Following the Institute, the new leaders undertake major year-long projects designed to give them practical leadership experience and to make their libraries more responsive to community issues. These projects are supported by small ($5,000) LSTA grants that are given directly by the State Library to the individual applicants' libraries; funding for those grants is not included in this application. The grant applications are developed through a seminar process led by the Infopoeple Director. Six months after the Institute, the cohort is brought together in a 2-day Encore event that serves as a check-in on personal, professional, and project action plans and also includes instruction in presentation skills, time management, and negotiation. A year after each Institute, after the completion of the projects, the cohort comes together again, with their library directors, for an Anniversary that features presentations of all the projects. The 2012 Anniversary will take place on September 23-24, 2013 and is included in this application. The next Institute is scheduled for March 19-14, 2014. The timing for the program is being changed (see Attachment #5) in order to sync the Eureka! grant application process with other LSTA applications and give the Fellows more time to work on their projects. A team from Social Data Insights, selected through a competitive RFP process (see RFP and proposal, Attachments #6 and 7) is just completing an extensive evaluation of the first five years of the Eureka! program and additional changes may be made as a result of their findings and recommendations (see preliminary report,
Attachment #8). Infopeople began to involve the Eureka Fellows in CLA Conference activities in a structured way in 2012. That successful experiment is being expanded in 2013, with 11 Fellows being involved in the creation of themed space (paid for by revenue generation) and development of involving, immersive activities at the CLA Conference. This experience will translate to creation of welcoming, creative spaces and immersive experiences in libraries.

3. The third component of this year’s work plan is ongoing support for other statewide and partner projects and State Library initiatives. This is an area of expansion for Infopeople, with more partner projects requesting more support and requiring more Infopeople staff time. This aspect of the Infopeople Project leverages the state’s investment in both Infopeople and other projects to increase effectiveness and reduce duplication of effort and cost. Specific activities in this area include: website hosting and maintenance (including upgrades); webinar coordination, support, and production; joint development and delivery of workshops and online courses; media hosting; discussion list hosting; shared virtual meeting service; instructional design; technical support for online training; meeting coordination; technical and general consulting; audio and video recording; conference support. A full list of partner projects and supported initiatives is in Attachment #9, and details of support provided are in Attachment #11. The Virtual LDS that was created as part of Infopeople in 2012/13 will reach full strength with 7 Virtual Grant Monitors (VGMs) under the coordination of Jacquie Thomas. Of particular note this year is support for the new statewide Early Learning Initiative. Infopeople will provide staff support at the pre-conference held in conjunction with CLA, and will produce 6 webinars for the initiative. In addition, 3 of Infopeople’s online courses are being scheduled in direct support of this new effort. Also noteworthy is the planned reactivation of targeted training for rural libraries. Specifically, this will involve a hands-on e-reader training (similar to the more general technology petting zoo) that will be delivered in 6 rural locations. (See Attachment #12)

4. The fourth component of the 2013/14 work plan is special event planning, coordination, and support for the State Library. This will involve a Public Library Directors’ Forum in the early spring of 2014 as well as the State Library presence and activities at the CLA Annual Conference.

5. The final component of the work plan consists of two new directions. First, Infopeople will support and participate in the second year of the statewide Staff Innovation Project developed by Rancho Cucamonga Library. Specifically, Infopeople will handle all of the logistical arrangements for 16 face-to-face workshops, including scheduling locations and trainers, producing and distributing handout materials, and paying for travel and backfill staff reimbursements. Infopeople will also contract for and work with the trainers. (See Attachment #13). The second new direction is the implementation of a project that the Infopeople Advisory Board has requested for several years, the California Library Leaders Memory Project. Board members have noted that many of the long-term leaders of the California library community have either retired or are about to retire (and a number of leaders, like Ursula Meyer and John Kallenberg, have died in recent years). Much of the history of California libraries, such as the impact of Prop. 13, the passage of CLSA, the history of the Library of California, is in the memories of those library leaders and is being lost with their passing. This project will consist of a series of recorded and edited interviews that will create an oral history of California libraries from the mid-20th century to the early 21st. Plans for this first year call for 12 interviews to be recorded and edited. More details are in Attachment #14).

Infopeople training is supported by a robust website (accessed over 1 million times a year) that includes much-used resources such as self-paced tutorials, the Search Tools Page, and Past Training Materials.

C. Anticipated Project Outputs — Measures of service or products provided.

- In 2013/14, Infopeople will create and deliver over 150 continuing education events including 37 online courses (instructor-led asynchronous, live online, and blended), over 55 live webinars and an equal number of archived webinars, at least 2 new self-paced tutorials, 36 podcasts, one virtual conference, and at least 26 face-to-face training events.

- 21,000 library staff members will participate in Infopeople continuing education and special events. 98% of those participating in training will report that they gained new knowledge or skills; 75% will discuss the training with co-workers, friends, or family; 60% will apply something they learned on the job.

- Infopeople will provide over 2000 hours of support to partner projects and State Library Initiatives (see
Attachments #9 and 11 for list), which will include: production of an estimated 20 partner project webinars; hosting of 11 partner project websites and media for 5 others; hosting of 37 electronic discussion lists; training and support for virtual meetings using Adobe Connect; staff support at 1 CLA preconference; design and delivery of 6 face-to-face hands-on workshops.

- 32 librarians will participate in leadership training through the 2014 Eureka! Leadership Institute and follow-up activities (grant writing, webinar presentations, mentoring, public speaking, Encore and Anniversary events).
- 30 librarians will complete 2012 Eureka! projects that make their libraries more responsive to community needs.
- 32 librarians who go through the 2014 Institute will complete successful LSTA grant applications and will undertake major year-long projects that will make their libraries more responsive to community needs.
- 11 Eurekans will increase their creativity, Imagineering, and customer service skills through participation in the CLA training and experience.
- Infopeople will provide planning, coordination, and support for 2 special events convened by the State Library.
- 750 people will visit the State Library/Infopeople/Eureka area at CLA and will participate in some activity; 150 library directors or top managers will participate in the Public Library Directors’ Forum.
- The cooperative systems and the State Library will use Adobe Connect for at least 150 virtual meetings and training events.
- 140 library staff members will participate in Staff Innovation training, with each receiving 4 days of training.
- 12 senior library leaders will be interviewed and the recorded interviews edited into oral history segments.
- The Infopeople website will be accessed over 900,000 times. The Resources section will be accessed over 66,000 times; Past Training Materials will be accessed over 200,000 times; the Search Tools page will be accessed over 386,000 times; 75% of those accessing the website will find what they are looking for.
- Infopeople will add over 200 new followers on Twitter and add more than 200 likes to its Facebook presence.

D. Anticipated Project Outcome(s) – What change is expected in the target audience’s skills, knowledge, behavior, attitude, and/or status/life condition? How will you measure these outcomes?
The State Library decided a number of years ago that Infopeople is not an outcomes measurement project.

E. Complete the following sentence. This project will be successful if:
California library staff at all levels gain the skills, knowledge, and tools they need to provide excellent library services to the people of California during a time of rapid change and limited resources.
ELEMENT 4:  GRANT TIMELINE/ACTIVITIES

Show each major project activity and when it will be started and/or completed throughout the project. The timeline should correspond to the activities described in Planning and Evaluation. Please put an X in each pertaining month.

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<td>Contract with ongoing consultants</td>
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<td>Produce and distribute list of planned CE events for FY²</td>
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<td>Identify and recruit instructors³</td>
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<td>Upgrade Remote Learner (Moodle software)</td>
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<td>Deliver Infopeople webinars</td>
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<td>Archive webinars and make available through website</td>
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<tr>
<td>Convert webinars to podcasts/ make available thru itunes</td>
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<td>Provide website hosting for partner projects</td>
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<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Renegotiate/renew contracts with technology vendors</td>
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<td></td>
<td></td>
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<tr>
<td>Advisory Board meets</td>
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</tr>
<tr>
<td>Collect, compile, interpret statistical/evaluative data</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit reports to State Library</td>
<td>X</td>
<td></td>
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</tr>
</tbody>
</table>

1 See Attachment #15 for position descriptions.
2 Titles for all events are working titles; final titles may vary.
3 See Attachment #16 for trainer bios.
4 One will be a CORE 2 module on resources for veterans.
5 Michael Cart will continue his series on literature and publishing; Joan Frye Williams will offer a new series based on library directors’ requests for help “Working With … (Boards, Friends, Volunteers, Vendors, Consultants, etc.)”
## ELEMENT 5: BUDGET

The budget should clearly identify the amounts requested and from what sources.

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B LSTA</th>
<th>Column C Cash Match</th>
<th>Column D In-Kind</th>
<th>Column E (B+C+D = E)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Salaries &amp; Benefits</strong></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Advisory Board</td>
<td>$0</td>
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<td>Eureka! Fellows</td>
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<td>Webinar Presenters</td>
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<td>$0</td>
<td>$0</td>
<td>$157,235</td>
<td>$157,235</td>
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</tbody>
</table>

**Explaination:**

Infopeople does not use any LSTA funds for salaried employees.

Advisory Board – The Board has 12 members. 3 meetings are planned for 2013/14. Each Board member will spend 24 hours on meetings, plus an additional 2 hours each between meetings, for a total of 26 hours each for the year. The average hourly salary for Board members is calculated at $60, plus 30% for benefits, for a total of $78 per hour.

Eureka! Mentors – 8 mentors spend 66 hours at the Institute and 22 hours at the Anniversary, plus an average of 12 hours of one-on-one mentoring throughout the year. In addition, 3 mentors spend 40 hours each reviewing applications to the Institute and another 3 spend 40 hours each evaluating Eureka! grant applications. The value of their time is calculated at $78, as for the Advisory Board.

Eureka! Fellows – 11 Fellows are donating considerable time in support of the Infopeople/Eureka/State Library/statewide project presence at the CLA Conference. They will each spend a total of 42 hours on this project, beginning in August. Their average salaries are calculated at $45 plus 30% benefits, for an hourly rate of $58.50.

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B</th>
<th>Column C</th>
<th>Column D</th>
<th>Column E</th>
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</thead>
<tbody>
<tr>
<td><strong>Library Materials</strong></td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td>$0</td>
<td>$0</td>
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<td></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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</tbody>
</table>

**Explaination:**

Equipment (Items over $5,000 per unit)

<table>
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<tr>
<th></th>
<th>Column B</th>
<th>Column C</th>
<th>Column D</th>
<th>Column E</th>
</tr>
</thead>
<tbody>
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<td>$0</td>
<td>$0</td>
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<td>$0</td>
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</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>$0</td>
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</table>
### Operating Expenses

<table>
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<tr>
<th>Contracted Services</th>
<th>Column A</th>
<th>Column B</th>
<th>Column C</th>
<th>Column D</th>
<th>Column E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Category</td>
<td>LSTA</td>
<td>Cash Match</td>
<td>In-Kind</td>
<td>Total ($B+C+D = E)</td>
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<tr>
<td>1. Instructors</td>
<td>$209,000</td>
<td>$0</td>
<td>$0</td>
<td>$209,000</td>
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<tr>
<td>2. Schreiber Shannon</td>
<td>$53,600</td>
<td>$0</td>
<td>$0</td>
<td>$53,600</td>
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<tr>
<td>3. Contract employees /staff</td>
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<td>$171,540</td>
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<td>$1,059,115</td>
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<tr>
<td>4. Eureka! contract expenses (other than facilitators)</td>
<td>$74,300</td>
<td>$16,000</td>
<td>$0</td>
<td>$90,300</td>
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</tr>
<tr>
<td>5. Partner Project Support Hours</td>
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<td>$0</td>
<td>$0</td>
<td>$150,000</td>
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</tr>
<tr>
<td>6. Virtual Grant Monitors</td>
<td>$352,705</td>
<td>$0</td>
<td>$0</td>
<td>$352,705</td>
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<tr>
<td>7. Rural Library eReader Training</td>
<td>$24,650</td>
<td>$0</td>
<td>$0</td>
<td>$24,650</td>
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<tr>
<td>8. Staff Innovation Project – Contract Services</td>
<td>$116,200</td>
<td>$0</td>
<td>$0</td>
<td>$116,200</td>
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<tr>
<td>9. California Library Leader Memory Project</td>
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<td>$0</td>
<td>$16,910</td>
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<tr>
<td>10. Public Library Directors’ Forum</td>
<td>$70,000</td>
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<tr>
<td>11. California Library Association</td>
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<td>$56,085</td>
<td>$4,158</td>
<td>$60,243</td>
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<td>12. Technology Vendor Contracts</td>
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<td><strong>Subtotal</strong></td>
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<td>$247,825</td>
<td>$4,158</td>
<td>$2,257,124</td>
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</table>

### Explanation:

1. **Instructors:** This line item covers contract fees for instructors who develop and deliver online courses, webinars, and podcasts. For 2013/14, this includes 37 online courses, 24 of which are new and 13 recurring; 55 webinars, 35 of which will be delivered by paid instructors, and 36 podcasts. Fees for instructors of online courses range from $2,200 for delivery of a recurring class to $5,000 for development and delivery of a new course. Paid webinar presenters receive $1,000 per webinar. Podcast presenters are paid $500 per podcast. It should be noted that costs have been reduced significantly over the last 2 years — this line item was $502,250 in 2011/12.

2. **Schreiber Shannon:** Although Becky Schreiber and John Shannon are instructors, they are broken out separately because they are so integral to the Eureka! Leadership Program. This line item covers their fees for the 2012 Eureka! Anniversary event, the 2014 Eureka! Leadership Institute, and two one-day follow-up sessions for Leading From Any Position workshops delivered in 2012/13. Their fees can be seen in context in the Eureka! budget included in Attachment #5. (And it should be noted that their fees in 2012/13 were $132,200. The significantly lower amount this year is a result of changing the timeframe for the Institute, which meant there is no Encore event in 2013/14, and also from the elimination of any new sessions of Leading From Any Position.)

3. **Contract employees/staff:** A cadre of approximately 18 contract employees carries out most of the ongoing and new work of the Infopeople Project. These individuals have annual contracts with the Peninsula Library System that specify their scope of work and indicate a maximum number of hours. They do not receive benefits and are paid for the number of hours worked. Hourly rates range from $35 (Jennifer Jacobs) to $250 (Joan Frye Williams). None of the ongoing contractors has had an increase in their hourly rate for seven years. The increase in this line item results from the need to add two contractors, one to assist with webinar production (Jennifer Jacobs) and the other (Mary Ann Laun) to help the Infopeople Director and Assistant Director with all of the special projects, and the need for contractors to work more hours because of increased workload. Hours are based on actual hours in 2012/13. In addition, Joan Frye Williams was broken out separately in 2012/13 because of a special project that she was doing; her hours are included with the other contractors in this budget. Position descriptions are included as Attachment #15. Cost of the contract employees is offset by revenue from the online course fees.

4. **Eureka! contract expenses (other than facilitator):** Hotel expenses (overnight and meeting rooms, meals and
refreshment breaks, and AV support) for the 2012 Anniversary, 2014 Institute, and Leading From Any Position follow-up sessions. Also includes a speaker (Joan Frye Williams) and an outside company that will lead a team-building exercise at the Institute. For more details and to see these expenses in context, please see Attachment #5. The hotel expenses for the Institute are offset by $16,000 in tuition fees paid by the participants or their libraries.

5. Partner Project Support Hours: Based on actual experience in 2012/13 and on the addition of more partner projects, notably the Early Learning Initiative, CalVets, and the Edge Initiative, a variety of Infopeople contractors will spent 2000 hours supporting partner projects. At an average of $75 per hour, this totals $150,000.

6. Virtual Grant Monitors: Cost of contracts (fees and travel expenses) for 7 Virtual Grant Monitors working under the auspices of Infopeople in 2013/14. Figure supplied by Jacquie Thomas, VGM Coordinator. Details available from her.

7. Rural Library eReader Training: The details for this can be found in Attachment #12. Covers device set up ($2,250), workshop development ($2,000), and workshop delivery in six rural locations ($20,400).

8. Staff Innovation Fund contract services: Details about this can be found in Attachment #13. Includes contracts for all trainers, scheduling and coordination of workshops at four sites, and a contract with an outside evaluator.

9. California Library Leaders Memory Project: Details about this are provided in Attachment #14. Contract services cover an interviewer ($7,950), videographer ($3,200), and editor ($5,760).

10. Public Library Directors’ Forum: Infopeople secured quotes from 4 hotels (2 in Sacramento, 1 in San Jose, and 1 in Ontario). Budgeting $60,000 would cover costs at any of the hotels. The Ontario location is significantly less – about $50,000. The State Library will decide which location to use. This line item also includes a provision of $10,000 for a speaker or speakers for this event. Cost of Infopeople staff support time is included in item #5 above (Partner Project Support). Other costs – i.e., travel reimbursement for participants – are being included in a separate Networking grant.

11. California Library Association Participation: Revenue covers the contract services that support participation in the California Library Association, not only for Infopeople but also for other statewide projects.

12. Technology Vendor Contracts: Infopeople annually contracts with a variety of technology vendors to provide services including server space, webinar hosting, a learning management system, special event registration, closed captioning for webinars, and online surveys. The services are used not only by Infopeople in support of its basic training, continuing education, and leadership programs, but also by the State Library, other statewide projects, and partner projects. Thus, the benefits of these contracts are leveraged throughout the California Library community. The current list of vendors with costs for each is detailed in Attachment #18.

<table>
<thead>
<tr>
<th>Supplies</th>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1. General office supplies</td>
<td>$8,000</td>
<td>$0</td>
<td>$0</td>
<td>$8,000</td>
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<tr>
<td>2. Eureka! supplies</td>
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<td>$0</td>
<td>$0</td>
<td>$2,000</td>
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<tr>
<td>3. Rural eReader training supplies</td>
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<tr>
<td>4. Staff Innovation Fund supplies</td>
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<tr>
<td>5. Supplies for California Library Association</td>
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<td><strong>$4,500</strong></td>
<td><strong>$0</strong></td>
<td><strong>$18,500</strong></td>
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</table>
1. General office supplies: Costs for general office supplies for the Project Assistant and key contract staff have remained consistent for several years. In addition to the usual supplies (paper, pens, pencils, etc.) these costs include flip chart pads, markers, and other small items that support training events.
2. Eureka! supplies: Primarily covers the supplies for the Institute, which include flip chart tablets, markers, post-its, note cards, and photo supplies.
3. Rural eReader training supplies: For notebooks, dividers, etc. needed to support training and for continued reference in libraries.
4. Staff Innovation Fund supplies: Purchase of notebooks, books, etc.
5. CLA supplies: Covered by revenue other than LSTA. Includes supplies used at the annual Conference.

### Other Charges

<table>
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<tr>
<th>Item</th>
<th>Cost 1</th>
<th>Cost 2</th>
<th>Cost 3</th>
<th>Cost 4</th>
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<td>1. Telecommunications</td>
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<tr>
<td>2. Travel</td>
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<tr>
<td>3. Staff Innovation Fund travel</td>
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<td>$0</td>
<td>$20,000</td>
</tr>
<tr>
<td>4. Continuing education</td>
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<td>$0</td>
<td>$2,000</td>
</tr>
<tr>
<td>5. eReaders for rural library training</td>
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<tr>
<td>6. Rural Library Training Support – ARSL Conference</td>
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<td>7. CLA Conference</td>
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<td>8. CLA Conference – Staff Innovation Fund</td>
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<tr>
<td>9. Photocopy/printing – Infopeople/general</td>
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<tr>
<td>10. Photocopy/printing – Staff Innovation Fund</td>
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</tr>
<tr>
<td>11. Postage/shipping</td>
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<td><strong>Subtotal</strong></td>
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</table>

### Explanation:

1. **Telecommunications**: Covers telephone costs for Project Director, Project Assistant, and Special Events Coordinator.
2. **Travel**: Covers travel costs for key contract staff to attend events include the Eureka! events, the Public Library Directors’ Forum, CLA, and Advisory Board meetings. Also covers travel reimbursement for Advisory Board members, Eureka mentors and facilitators, and for the Eurekans who are sponsored to attend CLA. Covers travel for the rural library trainer(s), other Infopeople consultants who do f2f training during the year, and the consultants involved in the California Library Leaders Memory Project. Includes travel reimbursement for those being interviewed as part of the Memory Project. Details of travel costs for Eureka!, rural library training, and the Memory Project can be found in the Attachments that cover those projects.
3. **Staff Innovation Fund travel**: Covers travel reimbursement for participants and sub time reimbursement for libraries, up to $5,000 per site. Travel for SIF trainers is covered under Contract Services.
4. **Continuing education**: Covers expenses for one consultant to attend the annual CONTED Forum.
5. **eReaders for rural library training**: Includes a collection of different eReader devices for a travelling “petting zoo” as well as eReaders for distribution to the libraries for continued staff use and training. See Attachment #12 for details.
6. **Rural library training support – ARSL Conference**: Covers registration, travel, lodging and meals for 30 people from rural libraries to attend the ARSL Conference in Omaha, September 25-28. Details are in Attachment #12.
7. **CLA Conference**: The LSTA amount covers sponsorship of 11 Eurekans to attend the conference and participate in Infopeople activities. The amount supported by non-LSTA revenue covers the carpeting and furnishings for the booth space at the conference.
8. **CLA Conference – Staff Innovation Fund**: Registration, hotel and travel reimbursement for up to 10 SIF participants.
9. **Photocopy/printing**: Covers all photocopying and printing for Infopeople training events including
Eureka!, rural library training, and the Public Library Directors’ Forum. Staff Innovation Fund printing is broken out separately.


11. Postage/shipping – Based on 2012/13 costs. Includes Staff Innovation Fund as well as Eureka! events, rural library training, and Public Library Directors’ Forum.

<table>
<thead>
<tr>
<th>Operating Expenses Subtotal</th>
<th>$2,230,621</th>
<th>$269,821</th>
<th>$4,158</th>
<th>$2,504,600</th>
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<tbody>
<tr>
<td><strong>Project Total</strong> (Salaries &amp; Benefits, Materials, Equipment, and Operating Expenses)</td>
<td><strong>$2,230,621</strong></td>
<td><strong>$269,821</strong></td>
<td><strong>$161,393</strong></td>
<td><strong>$2,661,835</strong></td>
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<tr>
<td>Indirect Cost (up to 10%)</td>
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<td><strong>$26,982</strong></td>
<td><strong>$16,139</strong></td>
<td><strong>$266,183</strong></td>
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<tr>
<td><strong>Grant Totals</strong></td>
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<td><strong>$296,803</strong></td>
<td><strong>$177,532</strong></td>
<td><strong>$2,928,018</strong></td>
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</table>
FUTURE FUNDING
Briefly describe how this project will be financially supported in the future.

For a number of years, Infopeople has started this section with the following statement, “The California State Library has identified Infopeople as one of the statewide initiatives that will retain long-term LSTA support.” This remains a true statement — Infopeople received strong support in the needs assessment for the current state LSTA five-year plan and is regarded by the State Library as its training or continuing education arm. We believe that the State Library will continue to support Infopeople at some level as long as LSTA funding is available. This belief has been strengthened by recent decisions by the State Library to add new responsibilities to the Infopeople work plan, most notably the Virtual Grant Monitors. However, we must be realistic in terms of the threats (national and state-level) to continued LSTA support. In order to address these threats, Infopeople has implemented cost controls, sought new revenue sources and partnerships, and is working on a business plan with consultant Joan Frye Williams.

ELEMENT 6: ATTACHMENTS
If you have additional resources that support your grant, please attach after this page

ELEMENT 7: INTERNET CERTIFICATION FOR APPLICANT
PUBLIC LIBRARIES FY 2013/14

Check the Appropriate Library Type

☐ Public Library ☐ Academic ☐ K-12 ☐ Multi-type ☒ Special/Other

As duly authorized representative of the applicant library, I hereby certify that: (check only one of the following boxes)

A. ☐ The applicant library has complied with the requirements of Section 9134(f)(1) of the Library Services and Technology Act.

B. ☒ The requirements of Section 9134 (f)(1) of the Library Services and Technology Act do not apply to the applicant library because no funds made available under the LSTA program will be used to purchase computers used to access the Internet or to pay for direct cost associated with accessing the Internet for a public library or public elementary school or secondary school library that does not receive discounted E-Rate services under the Communications Act of 1934, as amended.

[Signature of Authorizing Official]

[Date: 4-6-13]
ELEMENT 8: ASSURANCES

The applicant assures and certifies that it will comply with the regulations, policies, guidelines and requirements, as they relate to the application, acceptance and use of Federal funds for this federally assisted project. Also the Applicant assumes and certifies:

1. It possesses legal authority to apply for the grant; that a resolution, motion or similar action has been duly adopted or passed as an official act of the applicant's governing body, authorizing the filing of the application, including all understandings and assurances contained therein, and directing and authorizing the person identified as the official representative of the applicant to act in connection with the application and to provide such additional information as may be required.

2. It will comply with Title VI of the Civil Rights Act of 1964 (P.L. 88-352) and in accordance with Title VI of that Act, no person in the United States shall, on the ground of race, color or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the applicant receives Federal financial assistance and will immediately take any measures necessary to effectuate this agreement.

3. It will comply with Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d) prohibiting employment discrimination where (1) the primary purpose of a grant is to provide employment or (2) discriminatory employment practices will result in unequal treatment of persons who are or should be benefiting from the grant-sided activity.


5. It will comply with Title IX of the Education Amendments of 1972, as amended, 20 U.S.C. 1681 et seq., which prohibits discrimination on the basis of sex in education programs and activities receiving Federal financial assistance.

6. It will comply with the Age Discrimination Act of 1975, as amended, 42 U.S.C 6101 et seq., which prohibits discrimination on the basis of age in programs or activities receiving Federal financial assistance.

7. It will comply with requirements of the provisions of the Uniform Relocation Assistance and Real Property Acquisitions Act of 1970 (P.L. 91-646) which provides for fair and equitable treatment of persons displaced as a result of Federal and federally-assisted programs.

8. It will comply with the provisions of the Hatch Act which limit the political activity of employees.

9. It will comply with the minimum wage and maximum hours provisions of the Federal Fair Labor Standards Act, as they apply to hospital and educational institution employees of State and local governments.

10. It will establish safeguards to prohibit employees from using their positions for a purpose that is or gives the appearance of being motivated by desire for private gain for themselves or others, particularly those with whom they have family, business, or other ties.

11. It will give the sponsoring agency or the Comptroller General through any authorized representative the access to and the right to examine all records, books, papers, or documents related to the grant.

12. It will comply with all requirements by the Federal-sponsoring agency concerning special requirements of law, program requirements, and other administrative requirements.

13. It will insure that the facilities under its ownership, lease or supervision which shall be utilized in the accomplishment of the project are not listed on the Environmental Protection Agency's (EPA) list of violating facilities and that it will notify the Federal grantor agency of the receipt of any communication from the Director of the EPA Office of Federal Activities indicating that a facility to be used in the project is under consideration for listing by the EPA.

14. It will comply with the flood insurance purchase requirements of Section 102(a) requires, on or after March 2, 1975, the purchase of flood insurance in communities where such insurance is available as a condition for the receipt of any Federal financial assistance for construction or acquisition purposes for use in any area that has been identified by the Secretary of the Department of Housing and Urban Development as an area having special flood hazards. The phrase "Federal financial assistance" includes any form of loan, grant, guaranty, insurance payment, rebate, subsidy, disaster assistance loan or grant, or any other form of direct or indirect Federal assistance.

15. It will assist the Federal grantor agency in its compliance with Section 106 of the National Historic Preservation Act of 1966 as amended (16 U.S.C. 470), Executive Order 11593, and the Archeological and Historic Preservation Act of 1966 (16 U.S.C. 469a-1 et seq.) by (a) consulting with the State Historic Preservation Officer on the conduct of investigations, as necessary to identify properties listed in or eligible for inclusion in the National Register of Historic Places that are subject to adverse effects (see 36 CFR Part 800.8) by the activity, and notifying the Federal grantor agency of the existence of any such properties, and by (b) complying with all requirements established by the Federal grantor agency to avoid or mitigate adverse effects upon such properties.
ELEMENT 9: CERTIFICATIONS REGARDING LOBBYING, DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTER; AND DRUG-FREE WORKPLACE REQUIREMENTS

Applicants should refer to the regulations cited below to determine the certification to which they are required to attest. Applicants should also review the instructions for certification included in the regulations before completing this form. Signature of this form provides for compliance with certification requirements under 34 CFR Part 82 “New Restrictions on Lobbying,” and 34 CFR Part 85, “Government-wide Debarment and Suspension (Non-procurement) and Government-wide Requirements for Drug-Free Workplace (Grants).” The certifications shall be treated as a material representation of fact upon which reliance will be placed when the Institute of Museum and Library Services determines to award the covered transaction, grant, or cooperative agreement.

1. LOBBYING

As required by Section 1352, Title 31 of the U.S. Code and implemented at 34 CFR Part 82 for persons entering into a grant or cooperative agreement over $100,000, as defined at 34 CFR Part 82, Sections 82.105 and 82.110, the applicant certifies that:

(a) No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer of employee of Congress, or an employee of a Member of Congress in connection with the making of any Federal grant, the entering into or any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement;

(b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL “Disclosure Form to Report Lobbying,” in accordance with its instructions;

(c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants, contracts under grants and cooperative agreements, and subcontracts) and that all subrecipients shall certify and disclose accordingly.

DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

As required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR Part 85, for prospective participants in primary covered transactions, as defined at 34 CFR Part 85, Sections 85.105 and 85.110–

A. The applicant certifies that it and its principals:

(a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;

(b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph

(2)(b) of this certification; and

(d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default; and

B. Where the applicant is unable to certify to any of the statements in this certification, he or she shall attach an explanation to this application.

3. DRUG-FREE WORKPLACE (GRANTEES OTHER THAN INDIVIDUALS)

As required by the Drug-Free Workplace of 1988, and implemented at 34 CFR Part 85, Subpart F, for grantees, as defined at 34 CFR Part 85, Sections 85.605 and 85.610–

A. The applicant certifies that it will or will continue to provide a drug-free workplace by;
(a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee’s workplace and specifying the actions that will be taken against employees for violation of such prohibition;

(b) Establishing an on-going drug-free awareness program to inform employees about--

   (1) The dangers of drug abuse in the workplace;
   (2) The grantee’s policy of maintaining a drug-free workplace;
   (3) Any available drug counseling, rehabilitation, and employee assistance programs; and
   (4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

(c) Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph (a);

(d) Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under the grant, the employee will--

   (1) Abide by the terms of the statement; and
   (2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

(e) Notifying the agency, in writing, within 10 calendar days after receiving notice under subparagraph (d)(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to: Director, OLS/State Programs Division, Institute of Museum and Library Services, 1100 Pennsylvania Avenue, N.W., Room 802, Washington, DC 20506. Notice shall include the identification number(s) of each affected grant.

(f) Taking one of the following action, within 30 calendar days of receiving notice under subparagraph (d)(2), with respect to any employee who is so convicted--

   (1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
   (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement or other appropriate agency.

(g) Making a good faith effort to continue to maintain a drug-free workplace through implementation or paragraphs (a),(b),(c),(d),(e), and (f).

B. The grantee may insert in the space provided below the site(s) for the performance or work done in connection with the specific grant:

   Place of Performance (Street address, city, county, state, zip code)

   ______________________________________________________________
   ______________________________________________________________

   Check □ if there are workplaces on file that are not identified here.

DRUG-FREE WORKPLACE (GRANTEES WHO ARE INDIVIDUALS)

As required by the Drug-Free Workplace of 1988, and implemented at 34 CFR Part 85, Subpart F, for grantees, as defined at 34 CFR Part 85, Sections 85.605 and 85.610--

A. As a condition of the grant, I certify that I will not engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance in conducting any activity with the grant; and

B. If convicted of a criminal drug offense resulting from a violation occurring during the conduct of any grant activity, I will report the conviction, in writing, within 10 calendar days of the conviction to: Director, OLS/State Programs Division, Institute of Museum and Library Services, 1100 Pennsylvania Avenue, N.W., Room 802, Washington, DC 20506. Notice shall include the identification number(s) of each affected grant.

4. FEDERAL DEBT STATUS

   The undersigned, on behalf of the applicant, certifies to the best of his or her knowledge and belief that the applicant is not delinquent in the repayment of any Federal debt.
ELEMEN 9: CERTIFICATION

As the duly authorized representative of the applicant, I hereby certify that the applicant will comply with the above certification.

<table>
<thead>
<tr>
<th>Peninsula Library System</th>
<th>Infopeople: Helping Libraries Think Differently</th>
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<tbody>
<tr>
<td>Library/Organization</td>
<td>Project Name</td>
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<tr>
<td>Linda Crowe</td>
<td>Executive Director</td>
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<tr>
<td>Printed Name of Authorized Representative</td>
<td>Title</td>
</tr>
<tr>
<td>2471 Flores Street</td>
<td>San Mateo</td>
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<tr>
<td>Mailing Address (if different than page 1)</td>
<td>94403</td>
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Signature of Authorized Representative

Linda Crowe

4-26-13
Report on Public Library Directors' Survey

This six question survey was conducted during Dec 2012-Jan 2013 to assist planners at the State Library and Infopeople to form the agenda for a new public library directors’ orientation and public library directors’ forum scheduled for March 6 and 7, 2013.

**Question 1** asked how long the directors had been in their current positions. 36% had been in their current position two years or less, 30% 3-5 years, 17% 6-10 years, 13% 11-20 years, and 4% more than 20 years.

**Question 2** asked whether this was their first director position. 69% answered yes, 31% answered no.

**Question 3** asked about the directors’ level of interest in a variety of topics. The top topics were:

1. New or revised service models
2. Strategies for meeting and serving the library’s user community
3. Role of the State Library
4. New or revised systems, procedures, and work flow
5. Trend watching
6. Stimulating innovation
7. Evaluating Library performance
8. Grant sources, grant writing
9. Technology—knowing when to innovate with technology
10. Community partnerships
11. Marketing and PR
12. Fund-raising techniques and ideas

**Question 4** asked directors to list three topics they felt should be covered in a new library directors’ orientation (these were open-ended responses).

- 1. grants and resources 2. budgeting 3. State Library Programs & statewide programs
- Role of the State Library State and Federal Laws for Public Libraries Marketing and PR Strategies
- Budgeting, Role of the State Library, Marketing/PR
- Strategic Planning; Trends; Budgeting and fundraising of all sorts
- State Library’s role, state law, resources available to help with things (listservs, State Library, etc.)
- Role of State Library Current State Library Programs Grant Sources
- State programs, grants, and laws.
- State and Federal Laws re libraries Role of the State Library Budgeting
- How public library funding works in California 2. California and federal law as it pertains to libraries 3. Statistical overview of California libraries
- Fundraising, budgeting, staff development
- 1. California library organization - and particularly what is funded (or not) by the State and LSTA, including which statewide programs and services are funded through the State.
Some new Directors have no idea how the systems are funded, that Infopeople training is heavily subsidized, what LSTA is...also basic forms of library governance, administrative vs. advisory boards.... 2. Management nuts and bolts perhaps including a brief overview of California public employment law. 3. How to be an effective library advocate - in your own jurisdiction and at the state and federal levels. 4. Exposure to innovative/leading programs and services - learning from other libraries.

- California Library Law Forming a District in California The role of the State Library and other Library Related Organizations in California
- Role of the State Library - should it be as it always has been. Role of the Systems. Fresh eyes from New Directors.
- Role of State Library and Sysytems with some history for perspective for those new to Ca Best practices for networking building and mentoring Advocacy support training
- Budgeting, Leadership opportunities, evaluating library performance
- Resources for library directors (Rural Libraries initiative information, State Library resources/information). California library organization.
- Working with boards (advisory vs governing), friends, foundations Evaluating library performance (what statistics to gather and how to use them effectively to tell your story) Maintaining the big picture and vision without getting mired in operational details
- Role and relationship of State Library with California public libraries, including legislation both historic and emerging 2. Programs that will continue to be offered or supported even in part by the State Library in the current/future funding environment 3. Broader efforts of which the State Library is a part working on behalf of California public libraries
- HR issues; Legal issues; budgeting
- leadership, inclusion, fiscal strategies
- Current State Library Programs (what the State can do to support local libraries/directors) Strategic Planning Trend Watching
- Grant Sources, Community partnerships, fund raising
- Role of State Library Grant opportunities and expectations Evaluating library performance; establishing metrics that matter
- Role of the State Library Current State Library programs State and federal laws regarding public libraries
- State and Federal Laws governing Libraries California library organization, including cooperative systems Role of the State Library
- California libraries, funding, organization, systems, etc., including CLSA and LSTA 2. Retail type marketing and services, as explained by Joan Frye Williams
- Role of the State Library, current State Library programs, State and federal laws regarding libraries, working with Friends, boards and foundations.
- Budgeting (i.e., revenue sources, expenditure categories, budget control and reporting, budget justification 2. State and federal laws regarding public libraries 3. New or revised systems, procedures, and work flow
- Budgeting 2. Strategies for serving the library community 3. Grant Sources, fund raising
- Open source software Legal issues affecting libraries Evaluating (and improving) library performance
- State Library Programs Legal Issues Technology
• Rank the requirements for library reporting by order of importance. Where to go for help with ...
• How to negotiate with legacy staff and with the public the administration’s perceived need to change and innovate current delivery of public library services. When Friends of the Library become Enemies of the Library. Fighting in Public: How to handle negative press.
• What the state library can and cannot do for me or my library. Points of contact inside the state library for issues that routinely affect my library.
• CA Public Library Organization; Budgeting; Strategic Planning; Leadership Opportunities
• Role of the State Library State Library Programs in Current Current Economic Climate California State & Federal Laws Governing Libraries
• Library organization in the State Role of State Library Legal issues affecting libraries
• Role of the State Library Marketing and PR Evaluating Library performance
• State & Federal Laws/Legal Issues Budgeting (i.e., revenue sources, expenditure categories, budget control and reporting, budget justification) New or revised systems, procedures, and work flow/Service Models
• Budgeting Statewide library programs marketing library story
• Role of the State Library, Current library programs, new laws that will affect libraries
• Budget (state and local), alternative funding sources (grants, tax initiatives) and who to contact for what within the State Library.
• Value of California Library organizations including cooperative systems, Califa & Infopeople Trends in libraries and the role of the state library as a futurist Big issues that California libraries are facing - budgets, e-books, broadband
• Networking, staff development, budgeting.
• Legal aspects we all need to know. Marketing Fundraising/Budgets
• What role does the State Library seek to have in assuring adequate and equitable service for all California Libraries for example, a single library card for all Californians, database/ebook platforms, etc.
• Role of the State Library Current State Library programs State and federal laws regarding public libraries
• Role of the State Library State and federal laws regarding public libraries Legal issues affecting libraries
• Laws affecting Libraries Budgeting Strategic Planning
• Role of State Library, How to get involved with the State Library, and information about statewide programs
• A review of the different cooperative systems 2. The role of CALIFA
• Making positive connections with staff, the role of the Director as library advocate in the community, effective budgeting
• Strategies for meeting and serving library’s user community marketing and PR Civic engagement
• Role of the State Library, Current State Library Programs, State and Federal laws
• Who is who at the State Library Working with elected officials What does and can the State Library do to help my library?
• California Library Laws, and the things formerly funded by the State. Introduction to
Brown Act, we all work with Boards and Commissions. California public library
organization as it is different than any other place.
• State Library Services & Staff, Budgeting, Legal Issues.
• I think our success depends on how effectively we can attain broadband connections for
librarians. New librarians need to know the political landscape, more than anything else.
• Employment practices, HR issues. Strategic Planning, Evaluating Library Performance.
• Broadband & Technology CIP (funding). Revenue opportunities for special districts.
• Leadership opportunities. Community Partnerships. Working w/ Friends groups, Boards, and Foundations.
• Role of State Library; Current State Library: Library Laws.
• For New Directors: Current State Library Programs California Library Organization
These could be covered with handouts and information about how to find the information
via the Internet. New or Revised Service Models (could this be “Successful New or
Revised Service Models?”)
• The library has changed it is no longer like it used to be. (the game has changed)
2. Legal issues affecting libraries 3. Laws pertaining to County and City Libraries
• Dealing with resistance to change. Communication strategies for the new director.
Getting staff to understand and really deliver exemplary customer service.
• Current State Library Programs, State and Federal laws regarding public libraries,
Working with Friends groups, boards, and foundations.
• Especially for newbies—understanding California’s bizarre employment practices.
• Budgeting. Leadership. State Library roles, responsibilities, programs.
• How the state library supports local jurisdictions. Relationship building—boards, local
government, etc. Vision development.
• A brief breakdown of how California Libraries work (that might be different from other
states) in terms of funding/structure/organization/etc. - Resources for the New Directors:
who is a contact in a local region or that library’s cooperative? - Strategies for
communicating and advertising library services to the public and local leaders (which
would be especially important in the first year of the new director, especially if one is
new to the area).
• New service models and systems; trend watching and application analysis; performance
measures vs. output measures.
• What are the responsibilities of a Library Director. 2. What is the definition of a Library
Director. 3. What is the most important job of a library director.
• Budgeting. Grant sources, grant writing. Fund-raising techniques and ideas.
• Budgeting. Keeping the Library a top priority with local elected officials. Working with
Friends/Foundation/Trustees.
• What is the state library’s role? 1) Various reports that are required. 2) Forms that are
required. 3) Generalized list of who to call for what. 4) What various departments do—
literacy, etc. 5) Acronym list—CLLS, LSTA, etc. 6) How to access the state library’s
resources—e.g. foreign language books, research info, etc. This has changed with the
decline of funding to the local systems.
• Open source ebooks. Leadership.
How best to identify and assess consultants to assist with Library issues: staffing models, strategic planning, etc. Outside of ULC or Calix, are there other forums that can assist Directors with ideas formulation, how to do… Who at the State level can assist public libraries with jurisdiction, universal borrowing, Mello-Roos, etc. questions

Staying viable in the 2010’s Personnel policies and Board bylaws Elections for $ and outside sources from City, County and State.

state and federal laws that impact public libraries importance of political advocacy

Effective leadership as a first-time Library Director Leading staff through change Creating a staff culture of innovation

Any three of the first four above. This is their chance to learn firsthand about the State structure.

Money, Food and Power.

Role of State Library; Library laws; getting the most for the community from library services

Strategies for meeting and serving the library’s user needs New or revised service models Grant sources, Grant writing

Communication with stakeholders and organizations Budget practices; alerts to grants, etc. Required reporting and training in completing it properly

Grant Opportunities statewide and national 2. Strategies for meeting the library user community 3. role and importance of strategic planning 4. current state library programs beneficial to libraries

1) State Library 2) California Public Library Organization and Associations 3) Grants

Role and structure of the state library. Regional Systems.

Working with staff, dealing with diverse work ethics and attitudes, and evaluating library users and their needs

State Library info & programs

**Question 5** asked directors to list the top three topics they felt should be covered at the Public Library Directors’ Forum (these were open-ended responses).

1. grants and resources 2. budgeting 3. State Library Programs & statewide programs

Role of the State Library State and Federal Laws for Public Libraries Marketing and PR Strategies

Budgeting, Role of the State Library, Marketing/PR

Strategic Planning; Trends; Budgeting and fundraising of all sorts

State Library’s role, state law, resources available to help with things (listservs, State Library, etc.)

Role of State Library Current State Library Programs Grant Sources

State programs, grants, and laws.

State and Federal Laws re libraries Role of the State Library Budgeting

How public library funding works in California 2. California and federal law as it pertains to libraries 3. Statistical overview of California libraries

Fundraising, budgeting, staff development
• California library organization - and particularly what is funded (or not) by the State and LSTA, including which statewide programs and services are funded through the State. Some new Directors have no idea how the systems are funded, that Infopeople training is heavily subsidized, what LSTA is...also basic forms of library governance, administrative vs. advisory boards. 2. Management nuts and bolts perhaps including a brief overview of California public employment law. 3. How to be an effective library advocate - in your own jurisdiction and at the state and federal levels. 4. Exposure to innovative/leading programs and services - learning from other libraries.
• California Library Law Forming a District in California The role of the State Library and other Library Related Organizations in California
• Role of the State Library - should it be as it always has been. Role of the Systems. Fresh eyes from New Directors.
• Role of State Library and Systems with some history for perspective for those new to Ca Best practices for networking building and mentoring Advocacy support training
• Budgeting, Leadership opportunities, evaluating library performance
• Resources for library directors (Rural Libraries initiative information, State Library resources/information). California library organization.
• Working with boards (advisory vs governing), friends, foundations Evaluating library performance (what statistics to gather and how to use them effectively to tell your story) Maintaining the big picture and vision without getting mired in operational details
• Role and relationship of State Library with California public libraries, including legislation both historic and emerging 2. Programs that will continue to be offered or supported even in part by the State Library in the current/future funding environment 3. Broader efforts of which the State Library is a part working on behalf of California public libraries
• HR issues; Legal issues; budgeting leadership, inclusion, fiscal strategies
• Current State Library Programs (what the State can do to support local libraries/directors) Strategic Planning Trend Watching
• Grant Sources, Community partnerships, fund raising
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• Budgeting (i.e., revenue sources, expenditure categories, budget control and reporting, budget justification 2. State and federal laws regarding public libraries 3. New or revised systems, procedures, and work flow
• Budgeting 2. Strategies for serving the library community 3. Grant Sources, fund raising
- Open source software  Legal issues affecting libraries  Evaluating (and improving) library performance
- State Library Programs  Legal Issues  Technology
- Rank the requirements for library reporting by order of importance. Where to go for help with ...
- How to negotiate with legacy staff and with the public the administration’s perceived need to change and innovate current delivery of public library services. When Friends of the Library become Enemies of the Library. Fighting in Public: How to handle negative press.
- What the state library can and can not do for me or my library. Points of contact inside the state library for issues that routinely affect my library.
- CA Public Library Organization; Budgeting; Strategic Planning; Leadership Opportunities
- Role of the State Library  State Library Programs in Current Current Economic Climate  California State & Federal Laws Governing Libraries
- Library organization in the State  Role of State Library  Legal issues affecting libraries
- Role of the State Library  Marketing and PR  Evaluating Library performance
- State & Federal Laws/Legal Issues  Budgeting (i.e., revenue sources, expenditure categories, budget control and reporting, budget justification) New or revised systems, procedures, and work flow/Service Models
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- Networking, staff development, budgeting.
- Legal aspects we all need to know. Marketing  Fundraising/Budgets
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- Role of the State Library  Current State Library programs  State and federal laws regarding public libraries
- Role of the State Library  State and federal laws regarding public libraries  Legal issues affecting libraries
- Laws affecting Libraries  Budgeting  Strategic Planning
- Role of State Library, How to get involved with the State Library, and information about statewide programs
- A review of the different cooperative systems  2. The role of CALIFA
- Making positive connections with staff, the role of the Director as library advocate in the community, effective budgeting
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• Role of State Library; Current State Library: Library Laws
• For New Directors: Current State Library Programs  California Library Organization  These could be covered with handouts and information about how to find the information via the Internet  New or Revised Service Models (could this be “Successful New or Revised Service Models?”)
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• Especially for newbies—understanding California’s bizarre employment practices.
• Budgeting  Leadership  State Library roles, responsibilities, programs
• How the state library supports local jurisdictions  Relationship building—boards, local government, etc.  Vision development.
• Budgeting  New Service Models—Libraries for the 21st Century  Marketing
• A brief breakdown of how California Libraries work (that might be different from other states) in terms of funding/structure/organization/etc.  - Resources for the New Directors: who is a contact in a local region or that library’s cooperative?  - Strategies for communicating and advertising library services to the public and local leaders (which would be especially important in the first year of the new director, especially if one is new to the area)
• new service models and systems; trend watching and application analysis; performance measures vs. output measures
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resources—e.g. foreign language books, research info, etc. This has changed with the decline of funding to the local systems.

- open source ebooks leadership
- How best to identify and assess consultants to assist with Library issues: staffing models, strategic planning, etc. Outside of ULC or Calix, are there other forums that can assist Directors with ideas formulation, how to do... Who at the State level can assist public libraries with jurisdiction, universal borrowing, Mello-Roos, etc. questions
- Staying viable in the 2010’s Personnel policies and Board bylaws Elections for $ and outside sources from City, County and State.
- state and federal laws that impact public libraries importance of political advocacy
- Effective leadership as a first-time Library Director Leading staff through change Creating a staff culture of innovation
- Any three of the first four above. This is their chance to learn firsthand about the State structure.
- Money, Food and Power.
- Role of State Library; Library laws; getting the most for the community from library services
- Strategies for meeting and serving the library’s user needs New or revised service models Grant sources, Grant writing
- Communication with stakeholders and organizations Budget practices; alerts to grants, etc. Required reporting and training in completing it properly
- Grant Opportunities statewide and national 2. Strategies for meeting the library user community 3. role and importance of strategic planning 4. current state library programs beneficial to libraries
- 1) State Library 2) California Public Library Organization and Associations 3) Grants
- Role and structure of the state library Regional Systems.
- Working with staff, dealing with diverse work ethics and attitudes, and evaluating library users and their needs
- State Library info & programs

**Question 6** asked if there were any other professional or career development concerns directors wanted to see addressed.

- Mentoring younger leadership.
- Defending the relevance of a library masters' degree.
- How will the cooperatives hold together when there is no funding or other real incentive.
- Leadership and growth opportunities for library directors
- CSL has been doing a tremendous job in a difficult time. I would like to see its mission focused back on its core services going forward. In recent years it has seemed to have a bit of ADHD -- chasing after this or that shiny object with no real service vision or focus. In particular I would like to see more comparative analysis of the library statistics CSL collects each year -- with maps and charts showing the concentrations and differences between the various systems and jurisdictions. I would also like to see a trend analysis of where CSL-administered funds-- LSTA, Literacy,
etc. -- are allocated throughout the state, meaning to which systems, in what amounts and for what services and programs. I would also like to see more statistical breakdowns and analyses of demographic information, library funding, service trends, and community needs. These kind of statewide analyses would be tremendously helpful for incoming library directors to give them a sense of how their local jurisdiction and system compares to others around the state. P.S. I'm signing my name because I stand behind my comments. I hope my feedback is helpful, for that is the spirit in which it is offered. -- Sean Reinhart, Hayward PL

• I just wanted to say that the topics that I rated low are not because I am not interested in them but because I have had a great deal of exposure and experience with them already.

• Challenges and strategies for directors with emerging new roles within their agencies (e.g. combined library/cultural arts/parks & recreation oversight)

• Standards of behavior - banning patrons, suspending patrons - best practices? (including homeless and/or mentally ill patrons)

• Public messaging tips - e.g. talking to the media effectively.

• Job sharing - is there anyone in library land doing this in order to work a more manageable time?

• Unemployment among public librarians. Deprofessionalization of rural libraries.

• Library's role in economic development

• How do we as leaders manage the transition in staffing, keeping our young and talented new professionals engaged and challenged when opportunities are tight and limited.

• The Library Director's role in the organization, whether municipal or county governments.

• Developing the older director - (someone not brought up with technology that needs to know what's out there to bring their library into the 21st century) How to make other city departments realize that your library dept is very important and on the same level as the other departments. In other words the value of the library to assist all other city employees.

• Developing new leaders within current staff, future predictions regarding library budgets

• Legislative updates, CLA status with new director, library funding.

• Support network for Library Directors -- is there one? Professional development, such as a certification or "academy" opportunity for new or nearly new Library directors.

• I'm not exactly sure. My new library is in the ditch and needs to be pulled out. The library staff are bitter, burned out and mean to each other; the library is old; the community feels beat down as well from receiving consistently poor service. I'm Glenda the Good Witch but I could use some helpful tips to save the day.

• Chance to meet State Library staff, chance to network with Directors.

• Sustainability of library profession

• I would like to have a better understanding of how the State Library and the Consortia work together.

• The etiquette of talking to the previous Library Director when taking over after they have left the position. If there is such an etiquette!
1. Keeping up with new and innovative technology  
2. Writing successful partnership grants (Finding commonality among non-traditional partners in the community)  
3. New models of partnership within the private business sector (If business does well so will libraries)  

Can you teach me how to take 24 hours and get 72 hours of productivity in that one day? Sorry....  

As a fairly new director (just 5 years) I was amazed at what I didn't know about management. I wished I had combined my MLS with an MBA. How do we prepare librarians to be managers?  

Leadership development and opportunities for directors to step away to examine their library system - How does a library director identify when they are becoming "sticks in the mud"? Innovation and vitality can really prosper with a vibrant, open-minded director? When does a director recognize that they are shutting down new ideas because they have been in the position a long time and are becoming slightly jaded/cynical? And how does that director shake off that complacency?  

Leadership Community Input  

Balance in work. Because of budget constraints, we are looking at different ways to do things, or whether to do them at all. As part of the budget process last year, the Board spent two hours analyzing program offerings and prioritizing them. A bottom line discussion of "what do the customers want?" changed some of the things we offer. We made hamburger out of some sacred cows, but all looked at the mission statement of the library and strived to work with that lofty goal in mind. Balancing staff concerns/preferences, Board and public requests, professional standards, and ethics is not easy. Discussing various processes for accomplishing these goals and various planning methods would be helpful. Previous offerings on strategic planning, etc. have not always included uses for current technology and methods. As Directors, having information about big picture processes would be helpful.  

open source ebooks leadership  

Working with Friends and other library volunteers  Dealing with Public Records Act requests  What to do when you've lost control as manager  

How can I get multiple Doctorate Degrees with Printed Credentials, by June of 2013, before my next job review?  

how can small libraries survive even compete with larger library districts for grant funding when we just don't have the demographics? 2. how do we attract our non-users? In our case, we are a small library serving a community of 11,000 residents. Following a library survey we seem to attract children and seniors, but are missing the 20-55 group, unless they are parents?  

Obtaining adequate public library funding to meet the high demand of public library usage is the key concern. Insuring that publishers will sell e-content to libraries at reasonable prices is another significant concern. California laws pertaining to public libraries is another important topic  

personally - succession planning
2013/2014 Planned Training by Topic

Cataloging

- Basic Cataloging and Classification

Children’s Services

- Children’s Services Fundamentals
- Multicultural Children’s Literature
- Children’s Literature Update
- Reporting Child Abuse

Collection Management

- Street Literature
- Graphic Novel/Comic Collections for Teens

Community Engagement

- Civic Engagement
- Community Based/Focused Reference
- Book-to-Action Toolkit
- Incorporating Social Interaction and Community Into Your Website
- The Placer Plan

Customer Service

- Creating Great User Experiences
- How to Engage Customers (I2f workshop)

E-Health

- From Baby to Preschool: Early Childhood Health Resources
- Before Disaster Strikes: Online Resources Every Library Should Know

Early Learning

- Early Literacy Programming in the Digital Age
- Supporting Early Literacy Environments in the Library
- Simply Irresistible: Storytimes for 2 and Under
- Early Learning Initiative Webinars (6)
- Early Literacy Stations
Leadership

- Introduction to Eureka!
- Eureka! Leadership Institute 2014
- 2012 Eureka! Anniversary event
- Grantwriting Seminar for 2014 Eureka Fellows
- Creativity Workshop
- Staff Innovation Fund workshops

Grants

- Grantwriting 101
- Grants for Technology
- Corporate Grants
- Grantwriting Seminar for 2014 Eureka! Fellows

Management

- All Work is Team Work
- Communication is More than Words
- Budgeting Without Tears: An Introduction to Library Budgeting
- The Accidental Library Supervisor
- Second Level Supervision
- Library Management
- Practical Project Management
- How to Hire IT Staff for Your Library
- Succession Planning

Marketing

- Graphic Design for Library Staff
- The Accidental Library Marketer
- Merchandising eBooks
- Art Display for Librarians

Programming

- Programming for Special Needs
- Library Services to LGBT Families and Communities
- Human Library Project Panel
- Makerspaces in Libraries

Reader's Advisory

- Beyond Books
- Reader's Advisory Fundamentals
- Adult Readers Advisory with Graphic Novels
Reference

- CORE Reference Fundamentals
- Reference Innovations
- Rethinking Reference Collections
- Community Based/Focused Reference
- Reference Applications of New Technologies

School Collaboration

- Working with Your Local Schools: Steps to Effective Collaboration
- Library Programs for School Readiness
- Public Libraries and the Common Core Curriculum
- STEM Education

Social Media

- Library Applications of Social Media
- Developing a Social Media Policy
- Using Twitter as Your Professional Development Opportunity Center

Technology

- eReaders: Practical Help for Patrons and Staff
- Grants for Technology
- Designing/Developing Your Mobile Website: A Step by Step Approach
- Basic Graphic Design for Library Staff
- Refresh Your Website
- Planning a Digitization Project
- Cloud Computing: Impact on Library Services
- Geographic Information Resources
- Beyond Powerpoint: Using Prezi and Other New Presentation Technologies Effectively
- Cloud Computing: Update on Cloud Services
- Incorporating Social Interaction and Community Into Your Website
- How to Hire IT Staff for Your Library
- Responsive Website Design
- Low Cost Tech Tools for the Library
- Optimizing Materials Handling on the Cheap: How to Lean Your Workflow
- Open to All: Creating Accessible Word and PowerPoint Documents
- Merchandising eBooks
- RFID for Security, Customer Service and Workflow
- California Preservation Program
- Automated Materials Handling: Products and Best Practices
Teen Services

- Teen Services Fundamentals
- Teen Advisory Councils
- Teen Volunteer Programs
- Innovative Teen Programming
- Teen Literature Update
## Planned Training Calendar 2013/14

### Online Courses

<table>
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<td>Working with Your Local Schools: Steps to Effective Collaboration</td>
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<td>Redesigning/Reconfiguring Library Space on a Shoestring</td>
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<td>Library Applications of Social Media</td>
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<td>Simply Irresistible: Storytimes for 2 and Under</td>
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Webinars:
- **Early Literacy Programming in the Digital Age**
- **US Census: New American Fact Finder, Part 1**
- **US Census: New American Fact Finder, Part 2**
- **Cloud Computing, Update on Cloud Services**
- **Programming, for Special Needs**
- **Incorporating Social Interaction and Community Into Your Website**
- **Trendwatching: Quarterly Trend Update with Joan Frye Williams**
- **Public Libraries and the Common Core Curriculum**
- **How to Hire IT Staff for Your Library**
- **Library Services to LGBT Families and Communities**
- **Teen Volunteer Programs**
- **STEM Education**
- **The Place Plan**
- **Geographic Information Resources**
- **Cloud Computing, Impact on Library Services**
- **Adult Readers’ Advisory with Graphic Novels**
- **Responsive Website Design**
- **Early Learning Initiative Webinar #1**
- **Innovative Teen Programming**
- **Transmedia Literacy**
- **Optimizing Materials Handling on the Cheap: How to Lean Your Workflow**
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<td>Open to All: Creating Accessible Word and PowerPoint Documents</td>
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<td>May</td>
<td>Technology</td>
<td>Automated Materials Handling: Products and Best Practices</td>
</tr>
<tr>
<td>May</td>
<td>Early Learning</td>
<td>Early Literacy Stations</td>
</tr>
<tr>
<td>May</td>
<td>Technology</td>
<td>Reporting Child Abuse</td>
</tr>
<tr>
<td>May</td>
<td>Early Learning</td>
<td>Makerspaces in Libraries</td>
</tr>
<tr>
<td>June</td>
<td>Technology</td>
<td>Before Disaster Strikes: Online Resources Every Library Should Know</td>
</tr>
</tbody>
</table>
2013/14 Planned Training Calendar

Online Courses (regular font)
*****************************
Webinars (italics)

July - 2013

Rethinking Reference Collections
Basic Cataloging and Classification
eReaders: Practical Help for Patrons and Staff

1. Early Literacy Programming in the Digital Age
2. US Census: New American Fact Finder, Part 1

August

Creating Great User Experiences
Readers Advisory Fundamentals

2. Cloud Computing: Update on Cloud Services
3. Programming for Special Needs
4. Book to Action Toolkit

September

Reference Innovations
Grantwriting 101
Early Literacy Programming in the Digital Age

1. Incorporating Social Interaction and Community into Your Website
2. Trendwatching with JFW
3. Public Libraries and the Common Core Curriculum
4. Teen Advisory Councils

October

Basic Graphic Design for Library Staff
Children’s Services Fundamentals
Beyond Books
Using CA Library Statistics Effectively

November

Grants for Technology
Refresh Your Website
Communication is More Than Words
Working with Your Local Schools: Steps to Effective Collaboration

December

CORE Reference Fundamentals
Supporting Early Literacy Environments in Your Library

1. Geographic Information Resources
2. Cloud Computing: Impact on Library Services
3. Adult Reader’s Advisory with Graphic Novels
4. Responsive Website Design

1. Trendwatching with JFW
2. Early Learning Initiative Webinar #1
3. Innovative Teen Programming
<table>
<thead>
<tr>
<th>January – 2014</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civic Engagement</td>
<td>Teen Services Fundamentals</td>
<td>Redesigning/Reconfiguring Library Space on a Shoestring</td>
</tr>
<tr>
<td>Budgeting without Tears: An Introduction to Library Budgeting</td>
<td>Library Programs for School Readiness</td>
<td>Corporate Grants</td>
</tr>
<tr>
<td>Designing/Developing Your Mobile Website: A Step-by-Step Approach</td>
<td>New/Accidental Library Supervisor</td>
<td>Multicultural Children’s Literature</td>
</tr>
<tr>
<td></td>
<td>Planning a Digitization Project</td>
<td></td>
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<td></td>
<td>-------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>1. Transmedia Literacy</td>
<td>1. Open to All: Creating Accessible Word and Powerpoint Documents</td>
<td>1. Art Display for Librarians</td>
</tr>
<tr>
<td>5. Early Learning Initiative, Webinar #2</td>
<td>5. Early Learning Initiative Webinar #3</td>
<td>5. Welcome to the Eureka Institute 2014</td>
</tr>
<tr>
<td>April</td>
<td>May</td>
<td>June</td>
</tr>
<tr>
<td>All Work is Team Work</td>
<td>Simply Irresistible: Storytimes for 2 and Under the Accidental Library Marketer</td>
<td>Library Management</td>
</tr>
<tr>
<td>Community Based/Focused Reference</td>
<td>Practical Project Management</td>
<td>Beyond Prezi and Other New Presentation Technologies Effectively</td>
</tr>
<tr>
<td>Second Level Supervision Course</td>
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<td>Library Applications of Social Media</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>1. RFID for Security, Customer Service and/or Workflow Optimization</td>
<td>1. Using Twitter as Your Professional Development Opportunity Center</td>
<td>1. Before Disaster Strikes: Online Resources Every Library Should Know</td>
</tr>
<tr>
<td>2. Children's Literature Update</td>
<td>2. Curating/Making Available City/County Government Data</td>
<td>2. Reporting Child Abuse</td>
</tr>
<tr>
<td>5. Transforming Life After 50</td>
<td>5. Early Learning Initiative Webinar #6</td>
<td>5. Early Literacy Stations</td>
</tr>
</tbody>
</table>
Eureka! Leadership Program

Fact Sheet 2013/14

The Eureka! Leadership Program is a unique, multifaceted leadership development initiative developed with broad-based input from the California library community to meet the needs of California libraries for developing leadership skills and behavior across a broad range of staff levels.

The Eureka! Leadership Program includes:
- The Eureka! Leadership Institute
- Online grant writing seminar
- Community-focused projects
- Eureka! Encore
- Eureka! Anniversary
- Webinars
- Imagineering and creativity workshops
- Leading From Any Position

In 2013/14, the Program will not include an Encore event because of the revised timing/schedule for the Institute. It will also not include any sessions of Leading From Any Position, because of cost.

The Eureka! Leadership Institute. The cornerstone of the program, the Institute is an intensive six-day residential event that is highly interactive and personally transformative. The Institute facilitators, Becky Schreiber and John Shannon, developed the Snowbird program and the Aurora Leadership Institute in Australia as well as numerous state and regional leadership institutes throughout the U.S. The Institute program combines elements from other leadership programs, most notably the Snowbird program and the Urban Library Council's Executive Leadership Institute, with uniquely California elements.

Institute Basics: Each year, thirty-two participants are selected through a competitive application process. During the Institute, the participants work in four learning groups, each of which is guided by two mentors who are established library leaders recruited by the Infopeople Director. Applicants for the Institute must be nominated/sponsored by their library. Applications are reviewed and rated by a panel of former mentors, assisted by the Infopeople Director and Assistant Director. For the first time this year, applicants will be interviewed, either in person at CLA or by phone. Since the second year of the program (2009), the Institute has been held at the Dolce Hayes Mansion in San Jose. Annual price comparisons continue to indicate that this venue is competitive in terms of cost, and certainly meets all of the space requirements for the Institute.

Schedule: The next Institute is scheduled for March 19-14, 2014. This represents a significant change from the fall dates that have been used for the last four years. The change is being made in order to bring the timing of the Eureka! project grant applications into line with the timing of
other LSTA grant applications, and to give the Eureka Fellows (those individuals who have completed the Institute) a full year in which to implement their projects. Here is the planned schedule for events associated with the next Institute:

September 2013  Application process opens
November 2013  Applicant interviews at CLA and by telephone
November 15, 2013  Applications due
Early January 2014  Selections are announced
Jan-March 2014  Pre-Institute work including:
  - Welcome webinar
  - Submission of bio and photo
  - Read material from online grant writing seminar
  - Select project and submit preliminary design
  - Take Enneagram
March 19-24, 2014  Institute takes place
March-May 2014  Fellows develop and submit grant applications
June 2014  Grant award letters are issued
July 2014-May 2015  Fellows implement projects
October 2014  Encore event
June 2015  Anniversary event

Online grant writing seminar. An integral part of the program, and a requirement for those participating in the Institute, is the selection by the participant and the sponsoring library of a project that will engage the participant for up to a year after the Institute. The project must address community needs and help to make the library more responsive to the community. The State Library provides the opportunity for participants to apply for small grants to support the projects. The Infopeople Director works with participants in a four-week online course to help them write strong grant applications. Applications are reviewed by a panel of former mentors.

This year Ms. Hinman is adopting a “flip the classroom” approach, which means that the written materials for the seminar will be made available two months before the Institute. Those attending the Institute will be expected to read and take quizzes on the material prior to March 19. Then after the Institute the seminar will focus on the development of the grant application via an
iterative one-on-one process between the instructor and each Fellow. The reason for adopting this approach is so the participants come to the Institute with a basic grounding in grant – specifically, LSTA – policies and procedures.

Community-focused projects. A webinar in February will provide some general guidance about the kinds of projects that are appropriate for Eureka! Fellows to undertake. A webinar in June will cover project management and reporting. The revised schedule will provide more time for the Fellows to implement the projects. In a related activity in the 2013/14 fiscal year, Infopeople consultant and Eureka! mentor Mary Ann Laun will develop an online subject index/database for all years of Eureka! projects. This responds to numerous requests from library directors.

Eureka! Encore. Six months after the Institute, the participants reconvene for two days with the facilitators and mentors. The first day provides the opportunity to reconnect the cohort, reaffirm personal action plans, and check on progress with the projects. The second day provides training in effective presentation skills, time management, and negotiation. Because the next Institute is in March 2014, there will be no Encore event during FY 2013/14.

Eureka! Anniversary. One year after the Institute, the participants come together for two days with the facilitators, mentors, and their library directors. Once again the cohort is reconnected and personal action plans are reaffirmed. The highlights of the Anniversary are the presentations by the participants of the results of their projects, in a showcase kind of mode. In 2013/14, the Anniversary for the 2012 Eureka! cohort will take place on September 23-24, 2013. The Encore and Anniversary events, like the Institute, are held at the Dolce Hayes in San Jose.

Webinars. After completing the Institute, Eureka Fellows are given the opportunity to demonstrate their leadership and presentation skills by conducting webinars on topics of their choice. They do this in teams of 2 or 3, supported by the Infopeople Webinar Coordinator and Webinar Producers. In 2013/14, Eurekans are scheduled to deliver webinars on early learning, adult programming, programming for those with special needs, teen advisory councils, innovative programming for teens, and the Book to Action program.

Imagineering and creativity workshops. This is a relatively new component of the Eureka! program, having first been offered in the summer of 2012. (Although it should be noted that a Creativity Workshop was included in the series of leadership skill development workshops that preceded the first Eureka! Institute.) These workshops provide an enrichment opportunity for those Eurekans who are interested in learning how to make library spaces more appealing and interactive and to engage customers more fully. The workshops are conducted by a retired Disney Imagineer assisted by Cheryl Gould, one of the most experienced Infopeople trainers. Although the focus of the workshops is the creation of a themed space and interactive activities that become part of the CLA Conference, the principles taught are directly applicable to library space and programming. There will be a 2-day Creativity workshop August 2-4 in Santa Clarita, and a one-day workshop on Engaging Customers sometime in October at the Doubletree Hotel in Ontario.
Other support. The mentors are available throughout the year for one-on-one telephone and in-person coaching. Each cohort is also supported by electronic discussion lists and a Facebook page. Fellow are sometimes sponsored to attend special conferences, such as the R-Squared Conference in Colorado, and are sometimes asked to present at statewide meetings, such as the Public Library Directors’ Forum.

Possible new direction. Two 2011 Eurekans, Chris Brown (Contra Costa) and Morgan Pershing (Santa Clara City) are testing out an idea for extending the Eureka experience and keeping a cohort together long term. Their idea is to have each cohort at the end of the Anniversary event select a project that can be replicated (without grant funding) in multiple libraries, and then to have periodic virtual meetings to share experiences and ideas. They will be presenting this idea at the 2012 Anniversary event.

Leading From Any Position. This is another leadership training event developed and facilitated by Schreiber Shannon Associates. The focus of this event is on developing leadership initiative and skills at all levels of library staff. Here is the description of LFAP from Schreiber Shannon: “Leading From Any Position was developed to ensure that the five disciplines of a learning organization are being implemented in today’s libraries – that personal mastery is attainable for all library staff, that mental models are examined and adapted, that daily priorities move the library toward a clear vision, that teamwork is enhanced, and that staff work within a systems framework to ensure better results. We apply the concepts of Peter Senge’s Fifth Discipline to today’s library environment, one individual at a time, inviting personal initiative to prove the power of one. This workshop provides pragmatic skills to facilitate better meetings, promote data based decision-making, generate and evaluate creative ideas, and assess the impact of projects. LFAP is a three-day program, two days to provide concepts and skills, and a follow up day in six months to reinforce progress.” This program has been particularly effective in re-energizing library staff who are past the mid-point of their careers and in developing leadership skills among key paraprofessionals/support staff. As noted earlier, no sessions of LFAP will be offered in FY 2013/14.

Eureka Evaluation. As part of the 2012/13 work plan, Infopeople issued an RFP (Attachment #6) for a comprehensive evaluation of the first five years of the Eureka! Leadership Program. The winning proposal was from Social Data Insights (Attachment #7). Evaluation began in March and is ongoing as of the date on which this application is being written, although a preliminary report is included as Attachment #8. The final report will be presented to the State Librarian at the end of June. Infopeople will implement any recommendations from the evaluation over the 2013/14 fiscal year.
Budget for Eureka! in 2013/14:

<table>
<thead>
<tr>
<th>Category</th>
<th>Item</th>
<th>Description</th>
<th>LSTA</th>
<th>Oth</th>
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</thead>
<tbody>
<tr>
<td></td>
<td><strong>2012 Eureka! Anniversary</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Serv.</td>
<td>Hotel</td>
<td>Includes overnight and meeting rooms, meals and refreshment breaks, and AV support for estimated 74 people (32 Fellows, 8 Mentors, 2 facilitators, 1 speaker, 5 IFP staff)</td>
<td>25,000</td>
<td></td>
</tr>
<tr>
<td>Contract Serv.</td>
<td>Facilitators</td>
<td>Schreiber Shannon</td>
<td>14,000</td>
<td></td>
</tr>
<tr>
<td>Contract Serv.</td>
<td>Speaker</td>
<td>Joan Frye Williams</td>
<td>2,500</td>
<td></td>
</tr>
<tr>
<td>Other Charges</td>
<td>Travel</td>
<td>Covers facilitators, mentors, and IFP staff. Based on actual mileage and airfare costs.</td>
<td>3,850</td>
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<tr>
<td>Other Charges</td>
<td>Printing</td>
<td>For support materials. Handled in-house by IFP Assistant</td>
<td>150</td>
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<tr>
<td></td>
<td><strong>Subtotal for 2012 Eureka! Anniversary</strong></td>
<td></td>
<td>45,655</td>
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<td></td>
<td><strong>Eureka! Leadership Institute 2014</strong></td>
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<tr>
<td>Contract Serv.</td>
<td>Hotel</td>
<td>Includes overnight and meeting rooms, meals and refreshment breaks, and AV support for 47 people March 19-24, 2014. Expense partially offset by tuition fees.</td>
<td>30,500</td>
<td>16,000</td>
</tr>
<tr>
<td>Contract Serv.</td>
<td>Facilitators</td>
<td>Schreiber Shannon. Fee same as 2012.</td>
<td>26,000</td>
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<tr>
<td>Contract Serv.</td>
<td>Speaker</td>
<td>Joan Frye Williams</td>
<td>2,500</td>
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<tr>
<td>Contract Serv.</td>
<td>Team Building</td>
<td>Outside firm leads evening team building event. Looking at 3 options, all approximately the same cost.</td>
<td>6,500</td>
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</tr>
<tr>
<td>Other Charges</td>
<td>Travel</td>
<td>Covers facilitators, mentors, and IFP staff.</td>
<td>4,155</td>
<td></td>
</tr>
<tr>
<td>Supplies</td>
<td>Misc.</td>
<td>Covers Institute supplies including flip chart tablets, markers, post-its, note cards, and photo supplies.</td>
<td>2,000</td>
<td></td>
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<tr>
<td>Other Charges</td>
<td>Printing</td>
<td>For Institute handbooks</td>
<td>2,275</td>
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<td></td>
<td><strong>Subtotal</strong></td>
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<td>71,430</td>
<td>16,000</td>
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<tr>
<td></td>
<td><strong>Subtotal for Eureka! Institute 2014</strong></td>
<td></td>
<td>87,430</td>
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<td></td>
<td><strong>Leading From Any Position Follow-Up</strong></td>
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</tr>
<tr>
<td>Contract Serv.</td>
<td>Hotel</td>
<td>Meeting space, lunch, breaks, for two one-day workshops in Sacramento and Ontario</td>
<td>9,800</td>
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<tr>
<td>Other Charges</td>
<td>Travel</td>
<td>For facilitators and IFP staff</td>
<td>1,500</td>
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<tr>
<td></td>
<td><strong>Subtotal for LFAP Follow-Up</strong></td>
<td></td>
<td>11,300</td>
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<tr>
<td></td>
<td><strong>Total for Eureka! Program 2013/14</strong></td>
<td></td>
<td><strong>$128,385</strong></td>
<td></td>
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</table>
Request for Proposal
for
Evaluation of the Eureka! Leadership Program

Infopeople

RFP issued: February 1, 2013

Proposal deadline: February 28, 2013

Contract issued: March 15, 2013

Project completed: May 15, 2013

Submit proposal via email only to:

Holly Hinman, Director
Infopeople Project
hinmanh@infopeople.org
Purpose

Infopeople is seeking a skilled evaluator with relevant library experience to examine the Eureka! Leadership Program in its entirety. We want an outside perspective on the Program to help us understand what is working well, what needs improvement, and what kind of impact Eureka! is having on the participants, their libraries, and their communities.

About Infopeople

Infopeople is a statewide LSTA-funded project that functions as the training arm of the California State Library. Infopeople offers a full slate of workshops, online courses, webinars, podcasts, and self-paced tutorials on topics of practical interest to the library community. More information about Infopeople is available at http://infopeople.org.

About the Eureka! Leadership Program

Infopeople also manages the Eureka! Leadership Program, the California State Library’s leadership development initiative. Eureka! targets degreed librarians with three to ten years of professional library experience, but is also open to those in library management positions who do not have an MLS.

Participants compete to be accepted into the Program. Each year, 32 California library staff who

- exhibit leadership potential,
- are nominated by their library director, and
- are willing to share their enthusiasm, optimism, and vision for future library services,

are selected for Eureka!

The centerpiece of the Program is the Eureka! Leadership Institute. The Institute is an intensive, week-long residential training event. Participants work with the same leaders and mentors throughout the entire Institute. Each segment of the multi-day curriculum builds on the elements that precede it, culminating in the commitment by each participant to an individual action plan and a community-focused project.

The Institute is extremely interactive, concentrating on small group work and direct, personalized feedback. This requires a very high level of engagement, group bonding, and risk-taking. A key element is the creation of a "safe place" for participants to explore themselves and to practice new leadership behaviors within a supportive framework. The 2012 Institute took place in San Jose, CA on September 19-24, 2012.
At the end of the Institute, the participants become Eureka! Fellows. Fellows continue to participate in the Program, working with the same colleagues, leaders, mentors, and Infopeople staff throughout the grant year. The Fellows

- Develop, apply for, and implement community-focused LSTA grant projects for their home libraries,
- Gather at the California Library Association conference to share insights and report progress to date,
- Meet mid-year at an Encore event for additional training and coaching, and
- Report their project experiences and outcomes to one another and to their library directors at an Anniversary event at the end of their Eureka! year.

Fellows from all years of the program also stay in touch with the rest of the Eureka! community via Facebook.

More information about the Eureka! Leadership Program is available at http://eurekaleadership.org/

Assignment

Infopeople needs an outside evaluator to prepare a comprehensive evaluation of the effectiveness of all five years of Eureka! Program activity. The evaluator will identify

- any positive difference(s) the Eureka! Leadership Program is making,
- which Program components are contributing to that difference,
- which components need retooling, and
- what else might be done to improve leadership development for California’s libraries.

The evaluator will work closely with Holly Hinman, Infopeople Project Director, who will provide background and other information related to this project. The evaluator must agree to work interactively, waiting for and incorporating feedback at each step of the process before proceeding.

The evaluator will be responsible for investigating

1. The effectiveness of each of the main Program components — Institute, Encore, CLA experience, Projects, and Anniversary. How has the Program changed participants’ perceptions, attitudes, and behaviors?
2. Whether and how participants benefited from each segment/activity of the 2012 residential Institute. What did they learn from each activity and how have they applied that learning?

3. The effectiveness of Program leaders, mentors, speakers, and Infopeople support staff. Which interactions/behaviors yielded positive results?

4. Whether there are any significant gaps or weaknesses in the Program. Where do we need to improve, and what options do we have for accomplishing that?

5. Whether the program works well for rural libraries. In particular, do rural libraries have the capacity to provide the support that is needed by a Eureka Fellow?

6. The effectiveness of specific tools that support the Eureka! Leadership Program:
   a. Application documents
   b. Welcome webinar
   c. Enneagram personality test
   d. Grant writing course
   How well does each of these tools move participants forward along their path to leadership?

7. The extent and impact of ongoing professional relationships among the Fellows, both within a specific year’s cohort and across cohorts. Do these relationships enhance leadership development?

8. The extent and impact of ongoing professional relationships among Fellows from the same library. Does the shared Eureka! experience affect how they work together? Is there a “multiplier effect?” from training participants from the same library?

The evaluator does not need to investigate:

- Program costs or return on investment, or
- Program branding, popularity, or whether participants enjoyed the events.

**Information Gathering**

You are free to propose whatever information gathering techniques you believe will address the 8 points described above. Please note that we are looking for qualitative as well as quantitative information, and expect that this will require interviews or other
means of probing library directors' and mentors' subjective observations and conclusions.

Whatever techniques are used, information gathering activities must involve sufficient numbers of representatives from each of the following groups to support statistically defensible conclusions. Total Eureka! Leadership Program participants include:

- Eureka fellows - 160
- Fellows' library directors – 160
- Fellows' direct supervisors – 160
- Mentors – 28
- Program staff – 5
- Rural library directors – 6
- Library directors who have sent multiple participants through the Program - 7
- Participants who have voluntarily left the Program – 3

Infopeople will provide complete contact information for the members of each of these groups, and will assist the evaluator with communications, including any nagging needed to ensure full and timely participation.

**Deliverables**

The deliverables for this project will include:

1. Criteria that will be used to determine "effectiveness" in the context of leadership development

2. Detailed data gathering plan, including sample questions

3. Detailed raw information gathered from all sources

4. Specific analysis and conclusions linked to the information gathered

5. Draft report, addressing all 8 points described under Assignment above

6. Final report

All deliverables must be submitted in electronic form. Only the final report must be provided in hard copy.

Payments will be tied to the acceptance of each deliverable. Final payment will be made after Infopeople accepts the final report.
Your Proposal

Please don’t load up your proposal with boilerplate. Brevity will be prized! We believe we can make a reasonable assessment of your suitability for this project based on the following information:

- **Identification** – legal name and mailing address of the individual or firm submitting the proposal.

- **Contact** – name, title, email address and telephone number of the person who can be contacted to discuss questions regarding the proposal.

- **Introduction** – brief description of the individual or organization submitting this proposal, with a link to your website.

- **Work plan** – tasks to be performed, with a project calendar/timetable.

- **Qualifications** – relevant skills, background, and experiences that make you a good fit for this assignment. Please note that we think experience working with libraries/librarians is a requirement for success.

- **Personnel** – resume for each person who will be working on this assignment.

- **Costs** – itemized quote for all costs associated with this proposal, including labor, travel, lodging, office expenses, communications, and all other expenses.

- **References** – contact information for up to three individuals who can speak to your qualifications and working relationships.

Our Selection Process

All proposers will be starting with a level playing field. We have not previously discussed this project with any prospective evaluator, tailored the requirements to anyone’s qualifications, or otherwise stacked the deck to engineer a preferred outcome. We are looking for an **outside** viewpoint. Your past connection – or lack thereof – with Infopeople, the California State Library, or anyone involved with the Eureka! Leadership Program neither advantages nor disadvantages you in your pursuit of this opportunity.

Proposals will be evaluated by Infopeople Project Director Holly Hinman and Infopeople Consultant Joan Frye Williams. Cost will not be used as the sole criterion for final selection, but we are looking for cost proposals that do not exceed $40,000.
On the basis of the written proposals, Infopeople will select one or more evaluators to be interviewed by telephone. We expect to select the evaluator and award the contract within two weeks of the proposal submission deadline.

Infopeople reserves the right to reject any and all proposals received as a result of this request, or to negotiate separately with competing individuals or firms.

Dates and Deadlines

RFP issued: February 1, 2013

Proposals due: February 28, 2013

Contract issued: March 15, 2013

Project completed: May 15, 2013

Contact

Questions or other communications about this RFP may be submitted via email only, to:

Holly Hinman, Director
Infopeople Project
hinmanh@infopeople.org
EVALUATION OF THE EUREKA! LEADERSHIP PROGRAM

SOCIAL DATA INSIGHTS

Proposal submitted by Social Data Insights, Inc.

2/28/2013

As expert library consultants and professional evaluators, our valuable experience and proven results in measuring program impact and assessing the group processes involved in professional training programs will provide a thorough evaluation of the Eureka! Leadership Program designed to meet your specific needs.
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Brenda Hough .......................................................................................................... 10

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Stephenie Gerding ................................................................................................. 12
Brenda Hough ....................................................................................................... 12
IDENTIFICATION

Social Data Insights, Inc., 941 Lehigh St., Easton, PA 18042.

CONTACT INFORMATION

Dr. David Livert, Associate Professor of Psychology, Penn State University, Lehigh Valley, Livert@psu.edu, 32 Old River Road, Milford, NJ 08848, 610-597-0818 (cell); 610-285-5127 (office)

Stephanie Gerdig, Independent Library Consultant, 3507 SW Hanford St., Seattle, WA 98126, 602-761-0393 (cell); 206-932-2956 (office)

INTRODUCTION

The Eureka! Leadership Program and its Leadership Institute represent a cutting-edge leadership development initiative launched by the Infopeople organization. Infopeople seeks to collect valid and reliable data regarding the program’s effectiveness and to identify opportunities for continued improvement in future training efforts. To address these needs, we propose a multi-method, multi-outcome evaluation study with the goal of providing credible, convergent, and actionable data. We believe that the range of Infopeople’s data requirements require more than just a series of surveys.

Our multi-disciplinary team of expert library training consultants, social scientists and professional evaluators have the combined experience and skill set to thoroughly assess the outcomes of the program, report findings and recommend opportunities for improvement and sustainment of the initiative. As a team, our combined experience makes us uniquely qualified to evaluate the Eureka! Leadership program. Our consultants bring a diverse background of demonstrated success and in-depth knowledge and practical experience:

- In depth knowledge and practical experience in library leadership training and supporting learners to fulfill their needs and activities necessary for engagement
- Expertise in the design and execution of data collection to support summative program evaluations
- Research expertise with group processes and social dynamics
- Unique ability to engage interview subjects and encourage them to share personal viewpoints and thoughts
- Broad experience in the design of online surveys, depth telephone interviews and online focus groups that engage and make the best use of participants’ time
- Personable, flexible, communicative, and adaptive, with a dedicated commitment to libraries and learning.
Combining our deep knowledge and experience of libraries and library organizations around the country with the hard science of statistics, social surveying and group dynamics, our team can fully determine the true impact of the Eureka! Leadership Institute and ongoing fellowship program not only at a statistical assessment level but within the greater – and more important – context of library operations, leadership development and community/patron impact.

This comprehensive, fixed-fee proposal includes all the services and support necessary to survey the identified population of fellows and their leadership on numerous levels with multiple data gathering and qualitative research techniques to form an in-depth understanding of the changes in participants' perceptions, attitudes and behaviors. With our proven data compilation techniques, interview protocols, and analysis tools, we will distill and analyze outputs and outcomes, including post-program behavior. From this we will create clear, concise information points and specific recommendations that can be acted upon by Infopeople.

The end result will help Infopeople build upon the established foundation of this leadership program by supplying much more than a data-driven report on findings. Our team can provide not only the desired deliverables but more importantly we will present insight into the strategies and tactics for continuity and sustainability of an active and progressive leadership development mindset.

**WORK PLAN**

**Key Evaluation Components**

The overall goal of the evaluation is to provide Infopeople leadership with actionable information regarding the following:

- the positive impact of the Eureka! program in terms of changes in the Fellow’s behavior and effects within the Fellow’s library;

- components of the Eureka! program to which the these positive impacts can be attributed;

- components of the Eureka! program that could be improved, fellows that are not achieving their goals, or participants considered less effective or that are missing; and

- a set of recommendations regarding leadership development through the Eureka! program and the wider California system.

To achieve these goals we envision a broad array of primary data collection activities with the key stakeholder groups in the Eureka! program (i.e., Fellows, library leaders, mentors). The proposed research design is detailed below. We also envision secondary data analysis activities including 1) the review of program documents, curricular and supporting material, 2) any formative evaluation data collected in prior years, and 3) an assessment of a sample of the community projects undertaken by Fellows as a result of participation in the program.
Effective program evaluation requires the collection of outcome data that not only are scientifically valid and reliable, but that demonstrate the potential link between participation in leadership training programs and the end-user library patron. For the Eureka! project, our proposal includes the gathering of both quantitative and qualitative data. Program impact will be demonstrated not only through changes in Fellows' attitudes and beliefs but, more importantly, through behavior undertaken by Fellows as a result of the program. To link these outcomes to library end users, we also will document the perspectives of library directors and supervisors within the Fellows' libraries. These individuals will provide independent confirmation of the effects of the Eureka! program in terms of both the Fellows' acquisition of skills and knowledge but also the impact of the community projects undertaken by the Fellow. The directors and supervisors also are in a position to report on the radiating effects of the program: the degree to which Fellows have disseminated what they have learned through training programs and other activities within the library. The community projects also provide us with another source of convergent data. A sample of projects will be analyzed in terms of their design, executive, and outcome attainment.

Following is an overview of the primary data collection activities.

Fellows

The perspectives, insight, and behavior of Fellows are the most important source of data to the evaluation. We propose a multi-method approach to this group. In a small pilot study, we will test questions and items with a small group of Fellows to ensure clarity and relevance for the study. These will be integrated into an online survey for which all Fellows will receive an invitation and follow-ups (for non-respondents). The online survey (n = 160) will provide primarily quantitative data regarding:

- ratings of program components including the residential Institute, Encore, CLA, and Anniversary gathering
- evaluation of IAP and community projects
- Post-Institute contact with other Fellows (within and between cohorts), mentors, etc.
- post-program behavior (e.g., new initiatives, changes in role at library, career trajectory)
- ratings of Eureka! support tools
- ratings of program leaders, mentors, speakers and staff, and
- strengths and weaknesses of the program

Two qualitative approaches to collecting overlapping data from Fellows are also envisioned.

Participants for a series of telephone interviews (n = 10) will be recruited from Fellows who complete the online survey and indicate their willingness to take part in a follow-up interview. These interviews will follow a protocol, but interviewers will have the flexibility to probe new areas and issues that may arise. The protocol items will include:

- impressions of Institute, Encore, CLA, Anniversary
- challenges in developing IAP and community projects
- insights regarding leadership
- evaluation of activities and post-program contact
- current activities related to Eureka! training
- positive/non-so positive experiences
• ways to improve the Program
• usefulness of Eurekal support tools (i.e., Enneagram personality test, Grant writing course), ways to improve, current utilization
• current career trajectory and influence of Fellowship on it, and
• evaluation of interactions with program leadership, mentors, speakers and staff

In addition, we will conduct an online focus group with Fellows (n = 8-12) who completed the online survey but who were not recruited for the telephone interviews. Using synchronous meeting technology, the focus group will be led by Dr. David Livert and will focus primarily on Fellows’ overall perceptions of the program as a leadership training experience, how the program could be enhanced, effects on their library, and how their own professional identities have been enhanced by their participation.

Library Directors

Directors are in an excellent position to evaluate change in the Fellows and the effects of the Eureka! Program on their own library. We likewise propose a multi-method approach to this group. In a small pilot study, we will test questions and items with a small group of Leaders to ensure their clarity and relevance for the study. These will be integrated into an online survey for which all Directors will receive an invitation and follow-ups (for non-respondents). The online survey (n = 160) will provide primarily quantitative data regarding:

• Fellows’ post-Program behavior (e.g., new initiatives, changes in role at library, career trajectory)
• ratings of Eurekal support tools (if applicable)
• impact of program on Fellow’s professional development, leadership, day-to-day activities, initiation of new projects
• impact of Fellow on others in library: dissemination of skills and technology, training, leadership, etc.
• evaluation of Fellows’ IAP and community projects

In addition, a series of telephone interviews (n = 15) will be conducted with Directors. The sample for the interviews will include Directors from rural libraries, Directors from libraries who have had more than one Eureka! Fellow, as well as those recruited from the Directors online survey. The protocol items for the Directors’ interviews will include:

• impressions of the Eurekal program
• challenges experienced by the Fellow in developing IAP and carrying out the community projects
• insights regarding changes in the Fellows’ leadership skills
• ways to improve the Program
• assessment of the fit between the Program and the strengths/needs of their library
Direct Supervisors

Direct Supervisors also can provide an important perspective regarding Program impact in terms of Fellows as well as their own library. A multi-method will again be used with this group. In a small pilot study, we will test questions and items with a small group of Supervisors to ensure their clarity and relevance for the study. These will be integrated into an online survey for which all Supervisors will receive an invitation and follow-ups (for non-respondents). The online survey \((n = 160)\) will provide primarily quantitative data regarding:

- impact of Fellow on others in library: dissemination of skills and technology, training, leadership, etc.
- evaluation of Fellows' IAP and community projects
- Fellows' post-Program behavior (e.g., new initiatives, changes in role at library, career trajectory)
- ratings of Eureka support tools (if applicable)
- impact of program on Fellow's professional development, leadership, day-to-day activities, initiation of other new projects

In addition, a series of telephone interviews \((n = 10)\) will be conducted with Supervisors. The sample for the interviews will be recruited from the online survey. The protocol items for the Supervisors interviews will likely parallel that of the Directors:

- impressions of the Eureka program
- challenges experienced by the Fellow in developing IAP and carrying out the community projects
- insights regarding changes in the Fellows' leadership skills
- ways to improve the Program
- assessment of the fit between the Program and the strengths/needs of their library

Mentors

Due to the relatively small sample size, only telephone interviews \((n = 15)\) will be conducted with Mentors. The interview protocol will include:

- evaluation of program facets and activities
- strengths of the program
- areas for program improvement
- assessment of Fellows regarding acquisition of concepts, changes in behavior
- evaluation of Fellows' learning styles, responsiveness
- effects on Fellows' library 

Program Staff and Lost Fellows

In-depth interviews will be conducted by telephone with Eureka program staff (\(n = 5\)). These will focus on program details, available documentation and data, and aspects of program processes. The lead investigators will also conduct interviews with Lost Fellows (\(n = 3\)) who left the Eureka program. These
conversations will focus on the strengths and weaknesses of the Fellow’s experience with the Program as well as why they left the program.

**Study Design**

<table>
<thead>
<tr>
<th>Population</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eureka Fellows (n = 160)</td>
<td>Pilot interviews (n = 3-5)</td>
</tr>
<tr>
<td></td>
<td>Online survey (n = 160)</td>
</tr>
<tr>
<td></td>
<td>Telephone interviews with stratified random sample (n = 15)</td>
</tr>
<tr>
<td></td>
<td>Online focus group (n = 12-15)</td>
</tr>
<tr>
<td>Fellows Directors (n = 160)</td>
<td>Pilot interviews (n = 2-3)</td>
</tr>
<tr>
<td></td>
<td>Online survey (n = 160)</td>
</tr>
<tr>
<td></td>
<td>Telephone interviews (n = 15), including rural directors, multiple-Fellow directors in a stratified random sample</td>
</tr>
<tr>
<td>Fellows Supervisors (n = 160)</td>
<td>Pilot interviews (n = 2-3)</td>
</tr>
<tr>
<td></td>
<td>Online survey (n = 160)</td>
</tr>
<tr>
<td></td>
<td>Telephone interviews (n = 10)</td>
</tr>
<tr>
<td>Mentors (n = 28)</td>
<td>Telephone interviews (n = 15)</td>
</tr>
<tr>
<td>Program staff (n = 5)</td>
<td>Telephone interviews (n = 5)</td>
</tr>
<tr>
<td>Lost Fellows (n = 3)</td>
<td>Telephone interviews (n = 3)</td>
</tr>
</tbody>
</table>

**Work Plan and Proposed Schedule**

<table>
<thead>
<tr>
<th>Week of</th>
<th>Project Development</th>
<th>Data Collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 25</td>
<td>Pilot interviews with Fellows, Directors, Supervisors</td>
<td>In-depth interviews with Program Staff</td>
</tr>
<tr>
<td>April 1</td>
<td>Telephone interview protocols for Fellows, Supervisors, and Directors</td>
<td>Activation of online surveys for Fellows, Directors, and Supervisors. Start telephone interviews with Fellows.</td>
</tr>
<tr>
<td>April 8</td>
<td>Telephone interview protocols for Mentors</td>
<td>Continue interviews with Fellows. Start telephone interviews with Supervisors and Directors</td>
</tr>
<tr>
<td>April 15</td>
<td></td>
<td>Continue telephone interviews with Fellows, Supervisors, and Directors. Start interviews with Mentors and Lost Fellows</td>
</tr>
<tr>
<td>April 22</td>
<td></td>
<td>Completion of telephone interviews. Online focus group with Fellows</td>
</tr>
<tr>
<td>April 29</td>
<td>Data analysis and report writing</td>
<td></td>
</tr>
<tr>
<td>May 6</td>
<td>Data analysis and report writing</td>
<td></td>
</tr>
<tr>
<td>May 13</td>
<td>Finalization and delivery of final report; including executive presentation</td>
<td></td>
</tr>
</tbody>
</table>
QUALIFICATIONS

David Livert, Ph.D.
http://www.linkedin.com/pub/david-livert/6/37a/aab

Dr. David Livert has conducted a number of program evaluations for organizations including the Robert Wood Johnson Foundation’s Fighting Back Project, a Sloan Foundation initiative in online instruction, New York City College of Technology, Allentown School District, the 21st Century Community Learning Centers, and the United Way of the Great Lehigh Valley. Of particular relevance to the Eurekal Program, Livert has served for five years as an external evaluator for the National Science Foundation-funded GK-12 Fellowship program in New York City. In GK-12 project, Ph.D. students in the STEM disciplines receive professional training and direct experience with the goal of developing their teaching and leadership skills.

Dr. Livert’s research interest centers on group processes. His studies have investigated the effects of group composition and team dynamics on the professional training of chefs at the Culinary Institute of America, the role of temporal perspectives on food production teams in professional kitchens, group dynamics among American chefs cooking in Vietnam, and on teaching teams in an urban school district.

As an accomplished survey methodologist, Livert has conducted over 50 survey studies for clients ranging from non-profit organizations to institutions of higher education to financial institutions. His research efforts have led to publications in scholarly journals such as Multivariate Behavioral Research and Sociological Methods. Livert received his doctorate in social psychology from the City University of New York, where he was a Lawrence Kogan Fellow in quantitative methods. He also earned M.S. and B.A. degrees in psychology from Vanderbilt University.

Stephanie Gerding
http://www.stephaniegerding.com

Stephanie Gerding is a librarian, author, and trainer with over fifteen years of professional experience working with libraries, non-profit, and government organizations. She is an expert in grants, training, digital literacy, strategic planning, advocacy, and leadership areas. She has a Master’s of Library and Information Science (MLS) and a Bachelor of Arts, English, with a concentration in technical writing from the University of Tennessee. Relevant experience includes:

- Managing, facilitating, planning and outcome based evaluation of a 10-month Library Leadership Academy for Phoenix, Scottsdale, and Chandler Public Libraries
- TechSoup for Libraries Outreach and Content Manager for the Bill & Melinda Gates Foundation funded Edge Initiative. Overseeing interview process of public librarians to share success stories in achieving technology benchmarks and to provide models and best practices.
- Evaluation and reporting of statistical information for TechSoup Global online learning program
- Designed outcome-based needs assessment, core competencies, evaluation process, and training plans for the Arizona and New Mexico state-wide library training programs, including coordinating and marketing over 100 annual continuing education workshops and conferences
Developed, implemented, and evaluated a three-year training plan addressing Library Practitioner Core Competencies using the Western Council of State Libraries’ IMLS funded Continuum of Library Education

Representative for IMLS Outcome Based Evaluation Task Force on Library Continuing Education

Team of six trainers responsible for training and producing curriculum for technology training for Gates Foundation library grant recipients, 2-5 day weekly workshops including: pre-assessments, scheduling, goal setting, activities, evaluations, facilitation and training

Expert grant writer, reviewer, and trainer with experience in outcome based evaluation, currently conducting grants training for the California Staff Innovation Fund project.

Brenda Hough
http://brendahough.com

For more than 17 years, Brenda Hough has been a librarian. She is currently a full-time independent consultant, focused on providing effective learning opportunities for library staff. Her library experiences include work as a facilitator, planner, instructor, trainer, and evaluator. Her specialties include staff development, advocacy, patron technology training, and technology planning. She has worked with libraries nationwide and internationally. Her employers and clients have included Infopeople, TechSoup, WebJunction, The Bill and Melinda Gates Foundation, Public Library Association, Association of Specialized and Cooperative Library Agencies, Northeast Kansas Library System, Southwest Kansas Library System, Northeast Florida Library Information Network, Southeast Florida Library Information Network, State Library of Kansas, Texas State Library and Archives Commission, University of Illinois Urbana-Champaign, Emporia State University, and more. She is currently the Vice President/President Elect of the American Library Association’s Learning Round Table. Relevant work highlights include:

• Working with Minges and Associates, Brenda helped complete a comprehensive evaluation of the SEFLIN continuing education program, which included interviewing librarians about their experiences in the program.
• While at the Northeast Kansas Library System, she was responsible for planning, delivering, and evaluating an annual retreat for public library directors.
• At the Gates Foundation, she helped develop a peer coaching program and was responsible for the professional development of the 50 person on-site training team.

PERSONNEL
See attached resumes

David Livert, Ph.D., principal consultant and expert evaluator

Stephanie Gerding, managing consultant and library training expert

Brenda Hough, senior consultant and professional development expert

Andy Arrow, executive interviewer
COSTS

Our comprehensive proposal includes all costs necessary to efficiently complete the scope of work required. The labor and professional services have been carefully scoped out based on the RFP requirements and represent the team’s complete effort for the project. The work will be primarily conducted online as much as possible in order to minimize travel expenses, reduce the time requirements of the program participants, and facilitate timely project completion. The following is a summary of the costs.

Itemized Quote for All Costs

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor / Professional Services $1</td>
<td>$33,000</td>
</tr>
<tr>
<td>Travel and lodging $2</td>
<td>$3,000</td>
</tr>
<tr>
<td>Transcription $2</td>
<td>$1,500</td>
</tr>
<tr>
<td><strong>Total Costs</strong></td>
<td><strong>$37,500</strong></td>
</tr>
</tbody>
</table>

Notes to costs

1. Professional services are quoted herein as a fixed fee cost determined by the scope of work agreed upon in this contract.

2. These costs are estimates based on current travel, office, communication and transcription/printing costs and the scope of work agreed upon herein. These costs will not be billed in detail to the client but are a part of the overall proposal costs sufficient to cover the work identified in this proposal.

Payment terms

Our proposal is structured around the six deliverables outlined in the requirements. Payment of the total professional services and expenses will be tied to those deliverables so that upon acceptance of the deliverable the associated payment will be invoiced and paid within the agreed upon timeframes.

The total proposal cost will be broken out as follows:

- 10% ($3,800) on the delivery and acceptance of criteria used to determine effectiveness
- 20% ($7,600) on the delivery and acceptance of detailed data gathering plan, including sample questions
- 20% ($7,600) on the delivery and acceptance of detailed raw information gathered from all sources
- 20% ($7,600) on the delivery and acceptance of specific analysis and conclusions lined to the information gathered
- 20% ($7,600) on the delivery and acceptance of draft report, addressing all 8 points described under Assignment
- 10% ($3,800) on the delivery and acceptance of the Final report

All payments will be made to Social Data Insights, Inc., 941 Lehigh St., Easton, PA 18042.
REFERENCES

Dr. David Livot
- Dr. Elizabeth Tighe, Research Scientists, Steinhardt Social Research Institute, Brandeis University; tighe@brandeis.edu 781-736-3824
- Dr. Bert Flugman, Senior Researcher, Center for Advanced Studies in Education, City University of New York; BFlugman@gc.cuny.edu, 212-817-1810
- Dan Farrell, Executive Director, Allentown Housing Authority; dfarrell@allentownhousing.org, 610-439-8919

Stephanie Gerding
- Linda Bostrom, Manager of Professional Development, Public Library Association; lbostrom@ala.org 800-545-2433 x5027
- Sarah Washburn, Library Program Manager, TechSoup for Libraries; sarah@techsoupglobal.org, 415-633-9300
- Laura Stone, Grants Administrator, Arizona State Library, lstone@azlibrary.gov, 602-926-3469

Brenda Hough
- Cindi Hickey, recently retired Continuing Education Coordinator for the State Library of Kansas; cindi.hickey@gmail.com 785-766-2671
- Kendra Morgan, Senior Program Manager, WebJunction/OCLC; morgank@oclc.org 206-336-9211
- Diana Weaver, Director of the Basehor (KS) Community Library; dweaver@basehorlibrary.org, 913-724-2828
EUREKA!
LEADERSHIP
PROGRAM
EVALUATION

Interim Report
May 9, 2013

Dr. David Livert
Stephanie Gerdine
Branda Hough
Executive Summary

In March 2013, the Infopeople organization contracted with Social Data Insights (SDI) to conduct an extensive program evaluation of the first five years of the Eureka! Leadership program. The evaluation is multifaceted, consisting of data collection from the program’s primary constituencies and employing a multi-method design including online surveys, telephone interviews, and an online focus group with the goal of providing credible, convergent, and actionable data. The evaluation includes both summative and formative elements to assess the outcomes and impact of the program, report findings and recommend opportunities for improvement and sustainment of the initiative. The goal is to fully determine the true impact of the Eureka! Leadership Institute and ongoing fellowship program not only at a statistical assessment level but within the greater – and more important – context of library operations, leadership development and community/patron impact. We are distilling and analyzing outputs and outcomes, including post-program behavior, to enable an in-depth understanding of the changes in participants’ perceptions, attitudes and behaviors. From this we will create clear, concise information points and specific recommendations that can be acted upon by Infopeople with insight into the strategies and tactics for continuity and sustainability of an active and progressive leadership development mindset.

Our team has finalized all primary data collection with the key stakeholder groups in the Eureka! program, including fellows, mentors, Infopeople staff and facilitators, as well as fellow library supervisors and directors. We are currently conducting secondary data analysis activities to report on the radiating effects of the program. Although analysis of the interview data is still in process, it is already clear that the Eureka! program is successful and can be linked to several positive outcomes. As well we are confident that several opportunities for improvement and adaptation of the program will be clear. We will present our findings in report form on May 24th, 2013 and facilitate an in-person discussion of results on June 24, 2013 with a convening of Eureka! stakeholders in Sacramento.

Methodology

A summary of data collection efforts as of May 9, 2013 is shown in the table below.

<table>
<thead>
<tr>
<th>Eureka! Constituency</th>
<th>Modality</th>
<th>Number Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fellows</td>
<td>Interviews</td>
<td>19</td>
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<tr>
<td>Focus Group</td>
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<td>10</td>
</tr>
<tr>
<td>Survey</td>
<td></td>
<td>113*</td>
</tr>
<tr>
<td>Mentors</td>
<td>Interviews</td>
<td>15</td>
</tr>
<tr>
<td>Directors &amp; Supervisors</td>
<td>Interviews</td>
<td>28</td>
</tr>
<tr>
<td>Survey</td>
<td></td>
<td>39**</td>
</tr>
<tr>
<td>Infopeople staff</td>
<td>Interviews</td>
<td>6</td>
</tr>
</tbody>
</table>

* Response Rate = 69% with starting sample of 164
** Response Rate = 42% with starting sample of 91
Fellows:

A total of 19 interviews with Fellows were completed, including five pilot interviews. Fellows were recruited by email from an SDI interviewer, who followed up with the Fellow to arrange a convenient interview time. All interviews were digitally recorded and transcribed. Infopeople provided contact information for Fellows who were interviewed in the pilot phase of the study.

An online focus group was conducted on April 26, 2013 with 10 Fellows, who were recruited from a question included in the online survey. The focus group was lead by SDI investigators and conducted on the Adobe Connect platform with a PowerPoint presentation. Once they entered the platform, Fellows were anonymous—they utilized self-created names to maintain anonymity. Interaction consisted of live audio from SDI with Fellows typing responses and conversing within a chat pod. Three incentive prizes were awarded on the basis of a random drawing held at the conclusion of the meeting.

An online survey was launched on April 17, 2013 with Fellows recruited by email from SDI and Infopeople. The survey was closed on May 6, 2013. A total of 113 or 69% participated in the survey, which was hosted on SurveyMonkey. Highlights of the findings from the survey are reviewed below.

Mentors:

A list of Eureka mentors was provided by Infopeople. SDI interviewers initially contacted mentors by email to arrange a telephone interview, which was also recorded and transcribed. Several mentors were also library directors and these individuals were also asked additional questions from the directors/supervisors protocol or they completed the director's online survey. A total of 15 mentors were interviewed.

Library Directors/Supervisors:

Individuals who were direct supervisors of Eureka! Fellows while they participated in the program were either interviewed by telephone or completed an online survey. In cases where a library director was not the Fellow’s direct supervisor, the library director was included as well. The sample for this group was created by asking Fellows in the online survey and telephone interviews to indicate their direct supervisor and library director during their Fellowship. When not provided by the Fellow, email addresses were acquired through internet searches by SDI staff. A number of directors/supervisors had more than one Fellow. A total of 91 directors/supervisors were in the sample for the survey, which was launched on April 28, 2013. As of May 9, 2013, there were 39 completed surveys for an effective response rate of 42%.

Infopeople staff/Program leaders:

SDI investigators also interviewed Infopeople staff involved in the Eureka! program as well as program leaders (John Shannon & Becky Schreiber). A total of 6 interviews were completed.

Fellow 216: “I couldn’t envision a more tireless group of people who would do anything and everything to make sure that the program is a success.”

Survey of Eureka! Fellows

Selected results from the online survey of Eureka! Fellows are detailed below. A total of 113 Fellows participated in the survey with greater participation from the two most recent cohorts (2011 and 2012).
Online Survey Respondents

<table>
<thead>
<tr>
<th>Cohort</th>
<th>(n = 113)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>%</td>
</tr>
<tr>
<td>2008</td>
<td>17</td>
</tr>
<tr>
<td>2009</td>
<td>17</td>
</tr>
<tr>
<td>2010</td>
<td>16</td>
</tr>
<tr>
<td>2011</td>
<td>19</td>
</tr>
<tr>
<td>2012</td>
<td>30</td>
</tr>
</tbody>
</table>

Preliminary Analysis of Outcomes

Team SDI is currently engrossed in analyzing the cascading effects of the Eureka! program and determining the wide-reaching impact of Eureka! as well as specific recommendations for improvement and insight into strategies and tactics for continuity and sustainability of successful library leadership in California.

Promotions and Transfers

Most Fellows (82%) are working in the same library as during their fellowship year. Earlier cohorts are more likely to have transferred to a different library.

Four out of ten (40%) Fellows have been promoted since participating in Eureka!. The proportion of promotions is understandably lowest among the 2012 cohort. Nearly a quarter (22%) credit their Eureka! Fellowship completely for their promotion while another 68% think the fellowship was partially responsible.

*Fellow 205: "I think the other thing which is perhaps not so obvious is being in the Eureka program increases your visibility in your library system, not only in your own library, but in the library system throughout California. Library directors talk to each other. In administrations it is kind of a small world in a certain way, so it definitely increases your visibility, gives you a professional network — it was definitely helpful to my career, yes."

Job Change since Fellowship

<table>
<thead>
<tr>
<th>2008-2009 (n = 38)</th>
<th>2010-2011 (n = 39)</th>
<th>2012 (n = 33)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>Same position</td>
<td>45</td>
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</tr>
<tr>
<td>Lateral move</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Promotion</td>
<td>45</td>
<td>54</td>
</tr>
</tbody>
</table>
Activity within Local Library
Two thirds (65%) currently lead a committee or team at their library.

Participation in Organizations
Roughly a sixth (17%) of Fellows are leading a committee or team in an organization outside of their library; another third (33%) are active members of such an entity. Organizations include the CLA (51%), ALA (27%) and PLA (6%).

Leadership Behavior and Attitudes
Fellows reported the degree to which changes in their leadership behavior and attitudes can be attributed to the Eureka! Program. Most Fellows (79%-81%) credit Eureka! with empowerment as a leader, the acquisition and use of leadership skills, a greater assumption of a leadership role, and increased risk taking. Relatively fewer Fellows feel that they have taken on training roles, effectively understand the customer, or have provided positive feedback to colleagues as result of Eureka!

Development of Peer Network
Virtually all Fellows in the survey could list five individuals from the Eureka! program with whom they stay in touch. Fellows mostly listed other Fellows (77%) and most of these were from the same cohort, although slightly more from outside their learning group. Roughly 21% of Fellows listed a mentor as well. Roughly three quarters (77%) have discussed a problem they have encountered in their library with one of these peers, confirming the informational/supportive function of the Eureka peer network.

Fellow 202: "I think that is the greatest value that Eureka provides is the network of people who are highly motivated to make a difference in our society let alone in our libraries. It brings together people that are motivated to do this beyond it just being a day-to-day job."

Outreach, Partnerships, and Advocacy
The Eureka! program is having positive effects on libraries and the communities they serve. Fellows report a greater understanding of the big picture of the library's role in their community and the value of advocacy, of being aware of the depth and breadth of the profession.

Fellow 216: "We've done a lot more outreach. We've kind of restructured and reevaluated the way we were providing services, and a lot of that has been driven by the experience that I had in Eureka and talking with the other Fellows in my cohort. I think the other thing that's really Eureka-driven is to be more strategic in our alliances as a library, to work with more partners, to develop more partnerships both with community-based organizations and also those that are based within the City structure itself."
Eureka! Program Components

Overall
Fellows consider the Eurekan community and its potential connections as a result of their participation as the major strength of the program. Over half (52%) of Fellows consider the major strength of the Eureka program their ability to join a community of colleagues drawn from all over California. The Eureka community is considered a source of support, ideas, and motivation to the Fellows. The networking opportunities afforded through program events was mentioned by a quarter (26%) of Fellows. Interactions with Eureka mentors was considered a major strength by 24%. Note: percentages total to greater than 100% due to multiple categories mentioned.

Eurekans view the program components quite positively. Just under a third (31%) were unable to identify an aspect of the Eureka program requiring improvement or elimination. Areas mentioned typically involved exercises such as the personality test (7%) or the length of the Institute (9%) or Encore (5%).

Eureka! Institute
Fellows rated the degree to which various components of the Eureka Institute were ‘extremely useful’ or ‘very useful’ to them after completing the program. Interactions in mentor moments are without question the most useful component of the Institute; over eight out of ten (84%) Fellows consider mentor moments extremely or very useful. Leadership simulation (65%) and personality assessments (64%) are quite useful to over half of Fellows, as is the embracing change activity. The least useful components included: journaling (11%), daily action planning (19%), welcome webinar (32%), and support groups (35%).

Eureka! Encore
Four Eureka! Encore components are basically perceived as equally useful: negotiation skills (61%), presentation skills (60%), reviewing community projects (59%), and time management (56%). Just over a third (37%) of Fellows considered the action plan review highly useful.

Eureka! Anniversary
Most (76%) Fellows consider the five minute presentations at the Eureka! Anniversary event quite useful as well as the feedback they receive regarding their presentation (69%). The poster session event is less useful, in comparison.

Community Project
Fellows cite the support and enthusiasm of the Eurekan community including library leaders and peers (28%) as well as mentors (11%) as most impactful on their completion of the community project. Increased understanding of their leadership styles (18%) as well as self-confidence (15%) were influential project elements. Interestingly, more specific skills were less likely to be mentioned by Fellows than these interpersonal and intrapersonal influences. The community projects are having
radiating effects via new services, programming, and outreach, as well as receiving accolades through awards and media attention.

_Fellow 201: "Oh it's [project] changed my whole life at work basically. Because for a year it consumed all my day and it just continues to grow and grow and grow. It's no longer just my little Eureka project it's definitely a new service for the community that we will offer for a long time."_

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**Preliminary Conclusions from Eureka! Fellows Survey and Overall Evaluation**

Although analyses are still in process, it is clear from this point in the evaluation that the Eureka! program is successful and can be linked to job promotion activity, demonstrable leadership behavior and attitudes, and the development of a supportive peer network consisting of library colleagues from across California. The completion of qualitative data analysis from the Fellow's library directors and supervisors as well as Eureka! mentors should provide convergent evidence regarding these changes in Fellows.

Fellows are generally quite positive regarding program components including the Institute, Encore and Anniversary events as well as the community project. Although some elements are considered by Fellows less useful overall, it is clear that the interactions with Eureka! mentors, incorporation into the Eurekan community, and networking activities play a major role in the program’s impact on Fellows. The community projects have a far reaching impact on the larger communities served by the Fellow libraries, and have led to positive changes in library operations, services, programming, outreach, partnerships, and advocacy.

The final evaluation report will include recommendations for specific elements of the Eureka! Program as well as suggestions for new Eureka! Events. These will also be discussed during SDI’s face-to-face meeting on June 24, 2013.

**Social Data Insights Evaluation Team**

Our multi-disciplinary team of expert library training consultants, social scientists and professional evaluators bring a diverse background of demonstrated success and in-depth knowledge and practical experience.

David Livert, Ph.D., Associate Professor of Psychology, Penn State University, Livert@psu.edu

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Infopeople Partner Projects 2013/14

Definition: An Infopeople "partner project" is a statewide or multistate project or organization that has a mutually agreed upon working relationship with Infopeople. In many cases, Infopeople provides some type of service to the partner project, either as part of its overall mission or sometimes at cost.

1. ALA/APA Library Support Staff Certification (LSSC) Program
2. Braille and Talking Books Library
3. Califa
4. California Public Library Advocates (formerly CALTAC)
5. California Center for the Book
6. California Library Association
7. California Preservation Program
8. California Library Literacy Services
9. California State Library Early Learning Initiative
10. California Veterans Resource Program
11. CLA’s Summer Reading Program
12. Creando Enlaces
13. E-rate/California Teleconnect Fund
14. EDGE Initiative
15. Family Place
16. Get Involved: Powered by Your Library
17. Inland Library System
18. Libris Design
19. Los Angeles County Law Library: Legal Self-Help
20. Local History Digital Resources Project
21. Lyrasis
22. National Network of Libraries of Medicine
23. Northnet
24. Pacific Library Partnership
25. Rural Library Initiative
26. Santa Clara County Library Smart Financing Project
27. Serra Cooperative Library System
28. Southern California Library Cooperative
29. Staff Innovation Fund
30. State Library Continuing Education Coordinator’s Forum (CONTED)
31. Transforming Life After 50 Project
32. UC Davis eHealth Broadband Adoption Project
33. U.S. Census Bureau
34. WebJunction
Infopeople Support for Other Projects

Infopeople provides assistance in a variety of forms to other California LSTA projects and to other state-level projects authorized by the California State Library. Depending on the project and the need, assistance can include:

- Design and delivery of training
- Training consultation, including recommendations of appropriate trainers
- Website design, creation, hosting, and maintenance
- Media creation and hosting
- Webinar, podcast, and screencast production and hosting
- Discussion list creation, hosting, and management
- Meeting and special event coordination
- Shared use of licensed products including learning management systems, online meeting software, and online survey software
- Design of evaluation tools and methodologies
- Technical consultation and support
- Planning assistance
Support for Partner/Other Statewide Projects
FY 2013/14

ALA/APA LSSC Program
• Online learning (6-9 online courses planned)

Berkeley Public Library
• Website hosting: http://berkeleypubliclibrary.org

Braille and Talking Books Library
• Webinar production & support

Califa
• CLA annual conference booth design & support
• Virtual conference hosting (Edgy Librarian)

California Library Association
• Media hosting (Summer Reading Program)
• Webinar production & support (Summer Reading Program)
• Support for activities in “town square” open space at Conference
• Sponsorship of pre-conference program presented by ICMA

California Library Literacy Services
• Discussion list hosting
  o all@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o clls_dir@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o clls@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o clv@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o crl@lists.libraryliteracy.org - facilitates communication between the State Library and public library directors in California
  o cslrif@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o cvln@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o elli@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o ffl@lists.libraryliteracy.org - supports the California Library Literacy Services project
  o litwdi@lists.libraryliteracy.org - supports the California Library Literacy Services project
• mills@lists.libraryliteracy.org - supports the California Library Literacy Services project
• ncclln@lists.libraryliteracy.org - supports the California Library Literacy Services project
• ncic@lists.libraryliteracy.org - supports the California Library Literacy Services project
• Media hosting
• Webinar production & support (2-3 live webinars)
• Website hosting: http://libraryliteracy.org/
• Website maintenance & support

California Preservation Program
• Webinar production & support (1-2 webinars planned)

California Public Library Advocates (formerly CALTAC)
• Website maintenance and support

California State Library
• CLA annual conference booth design & support
• Discussion list hosting
  • aldirectors@lists.infopeople.org - supports assistant library directors in California
  • cacountylibs@lists.infopeople.org - supports the California County Librarians Association (CCLA)
  • ccpp@lists.infopeople.org - to enable California Cultural Crossroads Program recipients to communicate easily with one another to share programming ideas and plans
  • csl_info@lists.infopeople.org - is used by the State Library to share information with California public library directors
  • eratesimplified@lists.infopeople.org - supports libraries participating in the e-rate program in California
  • familyplacelibraries@lists.infopeople.org - supports the Family Place program
  • homeworkhelp@lists.infopeople.org - shares information related to providing after-school homework assistance either in the library or through online homework help services
  • oponline@lists.infopeople.org - supports California public libraries participating in the Gates Broadband Opportunity Online initiative
  • pldf@lists.infopeople.org - supports communication among libraries participating in the California Public Library Director's Forum
  • regionalldrs@lists.infopeople.org - supports the California Get Involved: Powered by Your Library project
  • sif@lists.infopeople.org - supports the Staff Innovation Fund training
  • slrss@lists.infopeople.org - is intended for use by State Libraries' Library Access and Innovation Fund support staff
- youthservices@lists.infopeople.org - informs children/youth services staff about grants and other partnering efforts that the State Library is working on (i.e. Jumpstart)
  - ReadyTalk
  - Planning, coordination, and support for Public Library Directors’ Forum
  - Management of Virtual LDS

California State Library Early Learning Statewide Initiative
  - Online courses (3 courses planned)
  - Webinar support (6-7 live webinars)
  - Support for 4 regional “unconferences”
  - On-site assistance with pre-conference program at CLA

California Veterans Resource Program
  - Chromebook support
  - Media hosting
  - Webinar production & support (1-2 live webinars)
  - Webpage hosting & maintenance (training videos & web resource pages)

Children's Nutrition Collection
  - Website hosting: http://www.childrensnutritioncollection.org/

Creando Enlaces
  - Webinar production & support

Early Learning with Families (ELF)
  - Website hosting: http://elflibraries.org/
  - Website maintenance & support

EDGE Initiative
  - Webinar
  - On-ground training

Get Involved
  - Discussion list hosting
    - getinvolved@lists.infopeople.org- supports team members of the libraries in the Get Involved: Powered by Your Library Project
    - volunteermatch@lists.infopeople.org - supports libraries participating in the California State Library's VolunteerMatch program
  - Webinar production & support (2-3 live webinars)
  - Website hosting: http://getinvolvedca.org/

Inland Empire
  - Webinar production & support
L.A. County Law Library/California Courts
  • Webinar production & support

Libris Design
  • Discussion list hosting
    o librisinfo@lists.librisdesign.org - supports the Libris Design program
  • Website hosting: http://librisdesign.org/
  • Website maintenance & support

National Library of Medicine, Pacific Southwest Region
  • Webinar production & support

NorthNet
  • Adobe Connect

Rural Library Initiative
  • Website hosting: http://rurallibraries.org/ and http://resourceroundup.net
  • Website maintenance & support
  • Planned e-reader training at 6 rural locations
  • Scholarships for 30 people to attend ARSL Conference
  • Free registration for online courses

Santa Clara County Library Smart Financing Project
  • Media hosting

Serra Cooperative Library System
  • Webinar production & support
  • Website hosting: http://serralib.org/

Southern California Library Cooperative
  • Adobe Connect
  • Discussion list hosting
    o alldirectors@lists.socallibraries.org - supports the Southern California Library Cooperative
    o audiovisual@lists.socallibraries.org - supports the Southern California Library Cooperative
    o autoserv@lists.socallibraries.org - supports the Southern California Library Cooperative
    o emergingtech@lists.socallibraries.org - supports the Southern California Library Cooperative
    o sclc.children@lists.socallibraries.org - supports the Southern California Library Cooperative
- sclc.circ@lists.socallibraries.org- supports the Southern California Library Cooperative
- sclc.reference@lists.socallibraries.org- supports the Southern California Library Cooperative
- sclc.workshop@lists.socallibraries.org- supports the Southern California Library Cooperative
- sclc.ya@lists.socallibraries.org- supports the Southern California Library Cooperative
- test@lists.socallibraries.org- supports the Southern California Library Cooperative
- Website hosting: http://www.socallibraries.org/

Staff Innovation Fund
- Discussion list hosting (4 lists to be created)
- Event planning
- On-ground training
- Support for SIF projects to attend CLA
- Webinar production & support

Transforming Life After 50
- Media hosting
- Webinar production & support – 1 live event
- Website hosting: http://transforminglifeafter50.org/
- Website maintenance & support

UC Davis eHealth Broadband Adoption Project
- On-ground training (1-2 sessions)
- Online courses (1 ongoing self-paced course)

Ventura County Law Library
- Website hosting: http://vencolawlib.org/
Infopeople Support for Rural Library Training 2013/14

Background: Infopeople has a long history of involvement in rural library training, going all the way back to the original distribution of computers and Internet connectivity to library branches throughout California. At that time, Infopeople developed a special format of face-to-face training for rural library staff—“bootcamp” training, where staff from a number of rural libraries were brought to a central location for several days, provided with room and meals, and trained in basic computer skills. Infopeople developed a website for the Rural Library Initiative and for the “Resources Roundup” clearinghouse. As time went on, rural libraries could select from a list of Infopeople workshops, and Infopeople trainers went out to train staff on-site. As Infopeople moved from face-to-face to online instruction, rural libraries were given a code so that staff could take Infopeople’s online courses free of charge. At the same time, senior Infopeople trainer Cheryl Gould implemented a “range rider” style of training that had been requested by Butte County. In this model, she traveled to 6-10 different rural location per year and delivered customized training and consulting, as needed by the library. These session usually included that latest version of the “technology petting zoo,” which proved to be an effective way to introduce not only library staff but rural communities members to many new technologies, especially different kinds of mobile devices.

No special training was offered to rural libraries during the 2012/13 fiscal year.

2013/14 Plan for Rural Library Training: This grant application includes a three-pronged program for rural library training. It is based on input from Darla Gunning, Susan Hanks, and Carla Lehn from the State Library, from rural library directors, and from Cheryl Gould. The three elements proposed this year are:

- Hands-on eReader Training
- Support for staff to attend ARSL Conference
- Free access to Infopeople online courses

Details about each element follow.

Hands-on eReader Training: The need for this has been documented by the general Infopeople needs assessment and by numerous “pitch” requests. As Infopeople instructors Dawne Tortorella and Debbie Baaske wrote in the online course, “eReaders: Practical Help for Patrons,” “The great variety of eReaders makes it difficult to support library eBook users. ... A few years ago most libraries were not interested in, nor needed to be experts on, this technology. Today they have no choice. If libraries want to support their users, they need to be somewhat fluent in all of the popular eBook readers.” Rural library staff tend to have less technology available to them, less support for that technology, and fewer opportunities for hands-on training than staff in urban/suburban libraries.

Infopeople eReader training will provide staff from 40 rural branches with the opportunity to learn about and experiment with a wide variety of eReader devices in an eReader “petting zoo” and will leave each branch with an accessible eReader device for continued staff training and use, as well as an eReader Reference Binder to keep at the public desk.
At the beginning of the eReader online course, Dawne and Debbie ask students, "So, how can you become more knowledgeable with the eReader that your patrons are using?" The first two pieces of advice they provide are to:

- Be able to recognize what the eReaders are and know a little bit about each one.
- Get your hands on as many eReaders as you can and play.

Infopeople eReader training will provide rural library staff with the opportunity to follow through on these two pieces of advice. Infopeople already owns a number of eReader devices – early generations of Kindle, Nook, Sony, and Samsung readers. Using the eReader Inventory Guide developed by Dawne and Debbie, Infopeople has priced the budget for acquiring the remaining devices, a total of $5,000.

In order to promote retention of comfort with eReaders, the training will also provide each branch library with an eReader to keep for staff training and use. The exact device will be selected in consultation with the State Library and Braille and Talking Books Library, and will be accessible. Devices will be set up by Infopeople staff prior to the face-to-face training.

The workshop will be based on the online eReader course and will include among the handouts the eReader Inventory Guide and as much additional reference material as possible. It will cover familiarity with the devices themselves, file formats and downloading, common patron questions, and a general approach that can be used in most patron interactions that involve eReaders.

The six sites for the training will be selected in consultation with the State Library.

Budget for this component:

<table>
<thead>
<tr>
<th>Category</th>
<th>Item</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Charges</td>
<td>eReaders for “petting zoo”</td>
<td>As many of the eReaders listed in the eReader Inventory as can be purchased at the time of the training. Purpose: to familiarize staff with as many types of eReaders as possible so they are not afraid to help public with the devices they bring in.</td>
<td>$5,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>eReaders for distribution to libraries</td>
<td>Each branch attending training will receive one eReader device for continued staff use/training. The specific device will be selected in consultation with CSL and BTBL.</td>
<td>$7,800</td>
</tr>
<tr>
<td>Contract Services</td>
<td>Device set-up</td>
<td>Infopeople will set up the devices and load them with material to be used in training. 30 hours @ $75/hr.</td>
<td>$2,250</td>
</tr>
<tr>
<td>Contract Services</td>
<td>Workshop development</td>
<td>To be based on “eReaders: Practical Help for Patrons”</td>
<td>$2,000</td>
</tr>
<tr>
<td>Contract Services</td>
<td>Workshop delivery</td>
<td>6 session at rural locations, $3,400/session</td>
<td>$20,400</td>
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<td>---------</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Travel/mileage</td>
<td>Trainer travel, $600 per session</td>
<td>$3,600</td>
</tr>
<tr>
<td>Supplies</td>
<td>Notebooks, dividers, misc.</td>
<td>To support training and for continued reference in libraries</td>
<td>$1,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Copying/printing</td>
<td>eReader Inventory Guide, other notebook contents, handouts</td>
<td>$2,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Shipping</td>
<td>Materials to sites</td>
<td>$200</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$44,250</strong></td>
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</table>

Support for rural library staff to attend ARSL Conference: In previous years, this was funded through a separate grant and was handled by CSL staff, but this year the State Library asked that it be included in the Infopeople grant. CSL instructed Infopeople to budget for 30 rural library staff members to attend.

This year’s ARSL Conference is in Omaha, Nebraska, September 25-28, 2013. In creating a budget for this element of rural library training, Infopeople made the following assumptions:

- Those attending the conference would register before August 25 (when registration rates increase), and would be non-members. The registration fee for each person was calculated at $300.
- Everyone would stay at the conference hotel, at conference rates, for 4 nights. Conference rate is $99 per night.
- Based on averaging current air fares from the most logical California location and assuming that fares will go up a bit before people book, the average flight cost per person was calculated at $650 round trip.
- According to ARSL staff, breakfast and lunch are provided as part of conference registration, so the only meals included in the budget are dinner. ARSL staff said that dinner in the hotel runs about $25.

Budget for this component:

<table>
<thead>
<tr>
<th>Category</th>
<th>Item</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Charges</td>
<td>Registration</td>
<td>Non-member early bird registration for 30 people</td>
<td>$9,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Lodging</td>
<td>Conference rate ($99) for 4 nights for 30 people</td>
<td>$11,880</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Travel/mileage</td>
<td>Airfare, average of $650 round trip for 30 people</td>
<td>$19,500</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Travel/mileage</td>
<td>Ground transportation, including mileage to/from departing airport, parking, tolls, shuttles or taxis</td>
<td>$7,500</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Meals</td>
<td>Reimbursement for dinners, calculated at $25 per person for 3 nights. Other meals included in conference registration.</td>
<td>$2,250</td>
</tr>
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</tr>
<tr>
<td></td>
<td></td>
<td><strong>Total</strong></td>
<td>$50,130</td>
</tr>
</tbody>
</table>

Infopeople is in the process of establishing a new listserv to reach the directors of those libraries that the State Library has classified as rural or partly rural. We would be happy to use that list to promote the availability of this opportunity and explain how to take advantage of it, but we are not sure if that is considered part of our role or will be handled by CSL staff.

In addition, when Infopeople sponsors people to attend conferences we typically expect those attending to submit to us a written report in which they describe their experience, tell us what they learned, and explain how they will apply the experience/learnings in their libraries. Again, we are not sure whether we can ask for this kind of reporting in conjunction with this conference.

Free access to Infopeople online courses. For a number of years, when the Rural Library Initiative was funded by a separate grant administered by the NorthNet Library System, rural libraries were given a code so that they could register for Infopeople courses free of charge. Infopeople kept track of usage and periodically billed NorthNet for the number of free registrations. Patty Hector, an employee of NorthNet, actively promoted Infopeople training and that fact that it was free for rural libraries, and it was fairly well used.

In recent years, because of changes in NorthNet administration and high turnover among rural library directors, usage of the free rural registration code dropped to almost nothing. In order to level the playing field in terms of access to and usage of Infopeople training, Infopeople plans to do marketing/promotion to promote awareness of the availability of free registration and encourage rural libraries to take advantage of these training opportunities. Because the response to this effort is unknown at this time, Infopeople is not requesting any additional funding for this element.
Staff Innovation Fund 2013/14: Infopeople Role

Background: The Staff Innovation Fund, developed by the Rancho Cucamonga Public Library, provides staff in participating California public libraries with targeted training in skills critical to effective 21st century library service. The project addresses what the 2012/13 grant application called "a defined need for a concentrated, structure, practical and hands-on learning experience that would help our staff continue to develop critical skills in area that will enable them to effect change not only in our organization, but in their future careers."

After an initial year that involved only the Rancho Cucamonga and Whittier Public Libraries, the project was funded for a statewide pilot in 2012/13. Given the statewide scope, Rancho Cucamonga brought Infopeople on board as a partner in the project. The statewide pilot involved four sites (Pasadena, Palos Verdes/Torrance, Kern County, and Napa/Sonoma/St. Helena) and was deemed a great success. Rancho Cucamonga is submitting a grant application for a second year of the statewide program, again partnering with Infopeople on implementation. The 2013/14 Infopeople grant application includes funding to support the Infopeople role in this program.

Infopeople support activities: Infopeople provides comprehensive logistical support that includes: webinar production/online meeting support; listserv hosting and management; contracting with trainers; securing signed commitments from participating libraries; setting up and explaining procedures for travel reimbursements for participating staff and processing travel reimbursement claims; setting up procedures for libraries to claim reimbursement for substitute/backfill staff and processing claims; working with libraries and trainers to schedule workshops; working with trainers on handouts and other support material; copying/printing/collating/shipping handouts and other support material; purchasing notebooks, books, assessment instruments, and other supplies and shipping to workshops; contracting with Paymaneh Maghsoudi for assistance with the "pitches"; hiring and coordinating with an outside evaluator. The Infopeople Director also provides some general oversight and consulting assistance to the Rancho Cucamonga management team. New this year will be sponsorship of 10 SIF participants to attend the CLA Conference in Long Beach.

2013/14 Plan: There will again be 4 participating sites. The Inland Library System will be one, in order to test the program in a consortium setting; the others will be selected by the beginning of the fiscal year. The schedule will be:

July    Infopeople secures written commitments from participating libraries.
August  Infopeople sets up 4 listservs, one for each site.
        Infopeople contracts with trainers and Ms. Maghsoudi.
Aug-Sept  Webinar/online meeting for directors of participating libraries. Infopeople distributes travel reimbursement forms and sample Invoices for claiming backfill time, and explains procedures.

Sept-Apr  Training period involving 5 days of training at each site, with a 6th day for “practice pitches.”

Nov  CLA Conference; 10 SIF participants sponsored to attend.

May  Real “pitches” to State Library. Overall evaluation.

Planned training content: The following list is from a telephone conversation with Robert Karatsu and Michelle Perera on May 1. Some of the trainers need to be confirmed and the titles of the training sessions are working titles.

<table>
<thead>
<tr>
<th>Training Session</th>
<th>Trainer(s)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 1, AM: “The Staff Innovation Project”</td>
<td>Robert Karatsu,</td>
<td>A 45-minute overview of the SIF. Content will be similar to content of webinar given at the beginning of the 2012/13 pilot.</td>
</tr>
<tr>
<td></td>
<td>Michelle Perera</td>
<td></td>
</tr>
<tr>
<td>Day 1, AM: “Know Your Leadership Strengths”</td>
<td>Ray Patchett</td>
<td>Mr. Patchett, former City Manager of Carlsbad, uses the Strength Deployment Inventory tool to gain a better understanding and insight of one’s own leadership sand management styles, and how to most effectively work with others regardless of the their style.</td>
</tr>
<tr>
<td>Day 1, PM: “Conflict Management”</td>
<td>Ray Patchett</td>
<td></td>
</tr>
<tr>
<td>Day 2, AM: “Communicating Up”</td>
<td>Ray Patchett</td>
<td>This program is designed for individuals who want to increase their visibility and effectiveness in communicating with their organization’s leaders, and will explore how to build credibility, trust, and relationships that will get your work noticed.</td>
</tr>
<tr>
<td>Day 2, PM</td>
<td>Jeremy Hunter</td>
<td></td>
</tr>
<tr>
<td>Day 3, PM: “Grant Writing 102: The State Way”</td>
<td>Robert Karatsu,</td>
<td>This program is designed to share insights and lessons learned to help grant applicants better understand the State Library’s LSTA grant application and pitch process.</td>
</tr>
<tr>
<td></td>
<td>Michelle Perea</td>
<td></td>
</tr>
</tbody>
</table>
Day 4, AM: "Making Public Presentations"  | Kevin McArdle  | This practical, interactive session gives tools to help participants become more confident and professional presenters.  

Day 4, PM: "Branding 101"  | Francie Palmer  | This program teaches how to punch up your personal presence, and by focusing on our personal brand through the StandOut strengths assessment, gives tips and techniques on taking performance to a new level.  

Day 5, AM: "Project Management"  | Robert Karatsu, Michelle Perera  | This program gives practical advice on how to manage a grant project, from the initial award to the final narrative report.  

Day 5, PM: "Written Pitch Review and 10 (or So) Tips for Making Pitches"  | Robert Karatsu, Michelle Perera  | Content of Tips section is similar to recent Infopeople webinar.  

Day 6: "Faux Pitches"  | Robert Karatsu, Michelle Perera, Paymaneh Maghsoudi  | Grant applicants can pitch their ideas to 3 successful grant writers/pitchers, and get feedback and coaching on their pitches.  

Budget for Infopeople role in SIF:

<table>
<thead>
<tr>
<th>Category</th>
<th>Item</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Services</td>
<td>Trainers/training</td>
<td>Handle contracts for and payment of all trainers, including Karatsu and Perera when in training mode. Coordinate with trainers and sites to schedule training and make local arrangements. Includes travel estimated at $700 per trainer per session.¹</td>
<td>$103,200</td>
</tr>
<tr>
<td>Contract Services</td>
<td>Coordination/support</td>
<td>Infopeople staff time to provide scheduling, purchasing supplies, production/shipping of materials, webinar/online meeting support, listserv support, etc.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Supplies</td>
<td>Purchase of notebooks, books, etc.</td>
<td>$3,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Copying/printing</td>
<td>Of handouts, pitches, etc. Based on actual 2012/13 costs.</td>
<td>$8,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Shipping</td>
<td>Of workshop materials to sites</td>
<td>$1,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>Mileage/travel reimbursement/sub time</td>
<td>Travel reimbursement for participants and sub time reimbursement for libraries, up to $5,000 per site</td>
<td>$20,000</td>
</tr>
<tr>
<td>Other Charges</td>
<td>CLA Conference</td>
<td>Registration, hotel, and travel reimbursement for 10 SIF participants - up to $1000 per person</td>
<td>$10,000</td>
</tr>
<tr>
<td>---------------</td>
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<td>------------------------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Contract Services</td>
<td>Evaluation</td>
<td>Based on cost for 2012/13 evaluation</td>
<td>$3,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Total</strong></td>
<td><strong>$158,200</strong></td>
</tr>
</tbody>
</table>

1 Trainer costs are higher this year for the following reasons:

- Some 2012/13 trainers were not effective and have been replaced; the replacements charge higher fees.
- Training sessions conducted by Robert Karatsu and Michelle Perera were last year included in the Rancho Cucamonga grant application and have been moved to the Infopeople application.
- Paymane Maghsoudi, who participates in the Faux Pitch session, was broken out separately last year and this year is included with other trainers.
- Based on actual experience in 2012/13, allowing up to $500 per session for travel was not sufficient, so the travel allotment has been increased to $700 per trainer per session. Actual expenses will depend on sites selected and it is possible that the allotted amount can be reduced somewhat.
New Directions: California Library Leader Memory Project

Need/Background: In FY 2011/12, the Infopeople Advisory Board expressed concern about the loss of collective professional memory within the California library community as a result of the retirement of large numbers of long-time library leaders. They asked that Infopeople undertake a new initiative to interview and record library leaders who are retired or about to retire, for the purpose of creating an oral history archive that could be accessed online and could serve as a resource for young librarians, anyone interested in library or state history, and especially for new library directors and new CLA officers. Infopeople did not pursue this idea in the 2012/13 grant application because of the unusual circumstances surrounding the 2012/13 application process, but the need is even greater now. Several of the legends of the library profession, notably Ursula Meyer, and John Kallenberg, have died since the Advisory Board identified this need, taking their memories and advice with them. A survey conducted in December 2012 revealed that 66% of the public library directors in the state have held their position for less than 5 years, and for 69% of the directors this is their first director position. The responses to other questions revealed a need for these young leaders to have the benefit of wisdom from those who have gone before.

Program Description: In this initial year, Infopeople plans to interview 12 senior California library leaders and create 12 professionally edited oral histories of 30 minutes each.

Infopeople will develop the list of interviewees in conjunction with a focus group/advisory board including Cindy Mediavilla from the CSL staff, a representative from the Infopeople Advisory Board, Linda Stewart from the Pasadena City College, and Martha Camacho from the Pasadena Public Library and Pasadena Digital History Collaborative. The focus group/advisory board will also help to develop the list of interview questions. Infopeople hopes to interview former State Librarians Ethel Crockett (if available), Gary Strong, Kevin Starr, and Susan Hildreth. Other potential interviewees include former CLA presidents and retired directors of large libraries, such as Ann Cain and Jane Light.

Interviews will be conducted by Michael Cart. Mr. Cart is the retired Beverly Hills Director of Library and Community Services. While at Beverly Hills, he was host of a popular cable television author interview program, “In Print.” A published author and popular keynote speaker, Mr. Cart also teaches for Infopeople, delivering webinars and podcasts on topics related to literature and publishing.

Each interview will be approximately one hour in length. This will be edited down to a finished length of 30 minutes. The filming will be done by a professional videographer using a single camera that will focus on the subject.

The finished oral histories will be available on the Infopeople website. A sample will be available at the Public Library Directors’ Forum in early spring 2014. The entire project will be featured in a program at the 2014 CLA Conference.
The budget for this project includes equipment recommended by Eureka! Fellows who have recently done similar projects. Other costs are contractual services for the interviewer, videographer, and editor, and travel expenses.

Objectives: This initiative seeks to create a body of work that will stand as the collective professional memory of the California library profession from the mid-20th century through the first decade of the 21st century. It will be a resource for new/young library professionals and those aspiring to leadership in the library profession. New leaders will be inspired, empowered, and guided by those who have gone before them.

Timeline:

- **July 2013** Identify all members of focus group/advisory board
- **August** Focus group/advisory board meets virtually
- **July-August** Create list of potential interviewees
- **July** Contract with interviewer, videographer, and editor
- **July** Order equipment
- **July-August** Develop interview format and questions
- **Sept-October** Schedule interviews
- **Nov-Feb 2014** Conduct interviews
- **Dec-Apr 2014** Edit recordings
- **May** Make finished recording available via web

Budget:

<table>
<thead>
<tr>
<th>Category</th>
<th>Item</th>
<th>Description</th>
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</tr>
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<tr>
<td>Other charges</td>
<td>Small equipment</td>
<td>Recording equipment (see breakdown below)</td>
<td>$3,075</td>
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<tr>
<td>Contract services</td>
<td>Interviewer</td>
<td>Michael Cart, interview and prep time</td>
<td>$7,950</td>
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<td>Other charges</td>
<td>Travel expense, interviewer</td>
<td>Includes air, hotel, meals</td>
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<td>Contract services</td>
<td>Videographer(s)</td>
<td>One or more, from near location of interviews</td>
<td>$3,200</td>
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<td>Other charges</td>
<td>Travel/mileage for videographer(s)</td>
<td>Ground travel only</td>
<td>Cost</td>
</tr>
<tr>
<td>---------------</td>
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<td>-------------------</td>
<td>------</td>
</tr>
<tr>
<td>Contract services</td>
<td>Editor</td>
<td>Estimated 72 hours editing @ $80/hour</td>
<td>$5,760</td>
</tr>
<tr>
<td>Other charges</td>
<td>Travel/mileage for interviewees</td>
<td>Difficult to estimate without know who will be interviewed; guesstimated at average of $200 each</td>
<td>$2,400</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>$27,260</td>
</tr>
</tbody>
</table>

Equipment details:

- Canon XA10 video cam
- Extra camera battery
- Rechargeable batteries AAA and AA and charger
- 100G SD card for vid cam
- 2 LED Panel lights
- 2 tripods (1 cheap for lighting and 1 decent for camera)
- Azden shotgun mic
- Watertight/rolling case
- XLR cable 10'
- Portable background

Total: $3,075
Infopeople Position Descriptions

Staff at Peninsula Library System:

Project Assistant -- At the beginning of the 2011/12 fiscal year, with the retirement of Linda Rodenspiel, this was changed from a PLS staff position to a contract consulting position. Gini Ambrosino, who already worked for Infopeople as a part-time consultant (and who was the Infopeople Project Assistant in the 1990’s), assumed the duties of the position. The current duties are described later in this document. Infopeople has no staff members at PLS at this time.

Key Contract Staff/Consultants:

Project Director

Duties: Responsible for overall Project planning, organization, coordination, reporting, and evaluation. Works with the State Librarian, the assigned grant monitor from Library Development Services, other State Library staff, and the Advisory Board. Serves as primary contact for the Project. Establishes policies and procedures. Designs training: works with the instructional design staff, Webinar Coordinator and other contract consultants to select trainers and to develop specific topical curricula and training materials; and evaluates the training program. Leads Training Team. Has created and manages the Eureka! Leadership Program. Works with Web Manager on website content and development. Supervises Assistant Director, Project Assistant, Lead Instructional Designer, and Web Manager. Is primary liaison for most partner projects, such as the Virtual Grant Monitors and Staff Innovation Fund. Develops public relations materials and Project products. Develops and administers surveys and questionnaires. Compiles, analyzes, interprets, and reports activity measures. Prepares funding requests and project reports. Monitors the Project budget and works closely with the fiscal officer at the Peninsula Library System. Gives presentations and writes articles about the Project. Works with outside consultants on Project-related activities, such as evaluation. During the 2013/14 grant year, major responsibilities of this position will include:

- Work with the State Library and Virtual Grant Monitors to make sure LSTA grants are monitored in accordance with state guidelines.
- Work with the Rancho Cucamonga Library and participating sites to implement the second year of the Staff Innovation Fund statewide.
- Work with consultant Joan Frye Williams on the completion of the business plan begun in 2012/13.
- Reorganized and revitalize the Infopeople Advisory Board to replace members who have left and increase participation.
- Take the lead in revitalizing training for rural libraries, especially the eReader training.
- Take the lead in implementing the California Library Leaders Memory Project, if approved/funded.
- Assess the implications of political and economic developments at the national and state levels for library grant programs in general and Infopeople in particular.
- Implement a revised timeframe for the Eureka! Leadership Program.
- Monitor the completion of the 2012 Eureka! grant projects.
• Implement the recommendations from the evaluation of the Eureka! Program by Social Data Insights.
• Interview applicants for the Eureka! Leadership Institute.
• Plan and implement the 2014 Eureka! Leadership Institute and 2012 Eureka! Anniversary.
• Deliver a four-week online grant writing course for the 2014 Eureka! Fellows and coach them through the development of grant applications for their projects.
• Revise Eureka! materials, including application materials and the Eureka! website.
• Begin preliminary planning for the 2014 Eureka! Encore and Anniversary events.
• Develop new/additional leadership opportunities for Eureka! Fellows from all cohorts.
• Supervise the ongoing training program and take the lead in the development and evaluation of new training topics and directions.
• Implement new policies and procedures to control costs for the development of training.
• Implement new fee structures to increase revenues (e.g., charging for “materials only” access to online courses).
• Serve as the lead in providing support to the special events planned by the State Librarian.
• Serve as the lead in identifying new partnerships and looking for grants to support new training in partnership with individual libraries or library organizations.
• Plan and oversee the implementation of activities at the California Library Association Conference.
• Evaluate the changes made to the initial pilot using Eurekans to conceptualize, design, build, and staff the booth at the CLA Conference.
• Decide on the level of Infopeople participation in the 2014 CLA Conference.
• Work with PLS and Califa staff to form a closer relationship between the two programs.
• Plan and supervise the production of training tools/products.
• Assess training priorities at the local level, especially in light of current economic developments.
• Develop new strategies and techniques to deliver training in light of current economic and staffing realities.
• Establish policy and oversee the provision of training and other related support to statewide and partner projects.
• Provide leadership in collaborative activities with other projects and organizations, including but not limited to: Braille and Talking Books Library, Califa, CALTAC, the California Library Association, California Library Literacy Services, Creando Enlaces, Early Learning Initiative, EDGE Initiative, Gates Foundation programs, Libris Design, Lyrasis, the National Network of Libraries of Medicine, the Library Access and Innovation Fund (Rural Library Initiative), SERRA Cooperative Library System, the Southern California Library Cooperative, WebJunction, and the Transforming Life After 50/Longevity Project.
• Identify needed research and tools.
Requirements: MLS degree and at least five years of professional library experience, including supervision and management. Must have experience in project management and grant preparation. Needs excellent oral and written communication skills and ability to work with large numbers of people. Knowledge of computer applications in libraries is essential. Must be willing to travel extensively within California.

Assistant Project Director

Duties: Responsible for coordination of technology projects, research and development, and relations with technology vendors (Moodle, Adobe Connect, etc.) Manages all discussion lists for Infopeople and collaborating projects; maintains Infoblog; creates and manages blogs and wikis; maintains Infopeople presence on Facebook and Twitter. Provides an audio introduction to all webinars and assists with webinar production. Edits webinars and converts them to podcasts; produces and edits all podcasts. Implements special technology projects. Writes and distributes weekly Peep Update. Under direction of the Project Director, prepares quarterly and other reports, does surveys and research, and creates multimedia presentations. Responsible for keeping all technology up to date. Helps Director conduct training needs assessments and determine training priorities. Is a member of the Training Team. Assists in the formulation of policies and procedures. Serves as backup to Project Director and acts as the Project Director in the Director’s absence. Represents Infopeople at various statewide meetings. In 2013/14, will:

- Manage the project with UC Davis and other projects supported by outside funding.
- Assist the Infopeople Director in identifying potential new partnerships and grant opportunities that will support new training with non-LSTA funding
- Manage any new projects like the UC Davis and Santa Clara County projects
- Take the lead in planning and implementing the “Edgy Librarian” virtual conference with Califa
- With the Infopeople Web Manager, provide technical support for all Eureka! events and for the CLA Conference
- Oversee technology upgrades, notably the Moodle upgrade scheduled for August 2013.
- In spring 2014, conduct a review and evaluation of all technology vendors that Infopeople uses to make sure their products and services are best for Infopeople purposes, at the best price
- Train Infopeople staff and partner projects in the use of new technology products such as Adobe Connect and the green screen technology for event photography
- Represent Infopeople at the CONTED National Forum
- Assist the Infopeople Director in identifying and implementing necessary cost reductions and controls

Requirements: MLS degree and at least five years of professional library experience. Needs excellent computer and technical skills, oral and written communication skills, and knowledge of California libraries. Must be willing to travel extensively within California.

Project Assistant

Duties: Responsible for the organization and operation of the basic support functions for Infopeople, which include:
• Serves as the main public contact for Infopeople via telephone and email
• Manages the registration system and handles registration for continuing education events
• Produces all documents, including grant applications and reports
• Compiles and reports on learner evaluations
• Conducts, compiles, and reports on surveys
• Handles contracting of instructors
• Handles general correspondence independently
• Promotes Infopeople events via multiple electronic and other means
• Takes and transcribes meeting minutes
• Provides logistical support at meetings, various training events and at the CLA Conference
• Handles assembly and shipping of any support materials for Infopeople events
• Works with Project Director, Assistant Director, instructional designers, trainers, vendors, libraries and library systems, the State Library, and technical support staff

Requirements: Excellent computer skills, including Windows, Microsoft Office, email, and Internet; excellent oral and written communication skills; strong people skills; organizational ability; strong general office skills (ability to file, operate fax and photocopy machines); good judgment and ability to make decisions. Library background and/or MLS highly desirable.

Lead Training Consultant

Duties: Helps Director and Assistant Director to conduct training needs assessments and determine training priorities. Researches, identifies, and recruits trainers for instructor-led online courses, self-paced courses, blended instruction, and webinars. Assists in development of specific training topics. Assists in the development of policies and procedures related to training. Maintains content of Tracker. Working closely with Project Director, guides trainers through initial steps of curriculum development including creation of outlines and announcements. With Project Director and Assistant Director, plans training schedule. Is a member of the Training Team. Assigns instructional design work to other training consultants. Provides instructional design for many courses, especially those dealing with technology. Suggests and implements marketing strategies for training. Attends, participates in, and reports on conferences as assigned by the Director. Implements special projects as assigned by Project Director.

Requirements: MLS degree and at least five years of professional library experience, including experience in continuing education/staff development. Needs excellent oral and written communication skills, strong organizational skills; ability to work with many different types of people; good judgment and ability to make decisions. Knowledge of California and national library landscape essential.

Other Training Consultants, Including Webinar Coordinator

Duties: Work with new and existing instructors to develop instructional and presentation materials, and to coach trainers on presentation and training techniques. Review and assess
appropriateness, accuracy, and thoroughness of content. Make suggestions for interactive activities and pre- and post-training assignments. Help trainers to develop meaningful and achievable learning objectives. Work with trainers on the development of solid outlines, compelling announcements, and attractive materials. Attend workshops or online training events to ensure consistent quality of Infopeople training and to share relevant information from each event with other trainers. Provide “quality control” for training and ensure the consistency of the Infopeople “brand.” Develop appropriate evaluative measures and techniques.

Requirements: Excellent computer skills, including Windows, Microsoft Office, email, and web searching; excellent oral and written communication skills; strong people skills; efficient and organized; good judgment and ability to make decisions. Training and education background highly desirable. Minimum of three years’ experience in delivering library training programs.

Web Manager

Duties: Responsible for appearance, functionality, and (with Director and Assistant Director) content of the Infopeople website. Creates and updates web pages. Implements overall graphic design of site. Does Drupal maintenance and simple program updates. Interacts with third parties who implement website upgrades, including the Galecia Group and other programmers. Maintains all interactive components of the website in proper working order. Checks and updates links on a regular basis. Works with authors of individual pages or sections of the site, such as the “Search Tools” section. Works with collaborating projects whose websites are hosted by Infopeople. Sets up mailing/discussion lists and assists in their management. Works with Project Director, Training Consultants and Project Assistant to continuously update training information on website. Works with registration system programmer to ensure continuous functionality and to effect needed upgrades. Suggests changes to website. Serves as producer for all webinars. With the Assistant Director, provides technical support for major Infopeople events including Eureka! events and the CLA Conference. Takes photographs to enhance the website. Produces short instructional screencasts.

Requirements: At least two years of website management experience; strong computer/technical skills; ability to work with many different people; good judgment and decision-making abilities; ability to set priorities. Knowledge of libraries highly desirable.

Event Coordinator

Duties: Makes all of the logistical arrangements for multiday training and special events. Participates in planning for events. Identifies and assesses hotels and other locations, negotiates pricing and contracts. Works closely with staff at event venues. Arrives early to make sure of room setup, AV, etc. Acquires and ships or transports any materials requested by trainers/presenters. Stays on-site to troubleshoot and support trainers, presenters, and participants. Communicates with participants to provide essential information about events, including transportation, accommodations, meals, dress, etc. Answers questions from trainers, presenters, and participants. Participates in debrief after events. Handles all of the booth arrangements for CLA, including the basic space contract, furniture and carpet orders, electrical and Internet connectivity, and staff scheduling. Works closely with CLA and GES staff. Handles
all of the logistical arrangements for the Eureka! Leadership Program events, including the Institute, Encore, and Anniversary events.

Requirements: At least two years of event planning/management experience; strong interpersonal and communication skills; ability to work with many different people; good judgment and decision-making abilities; tact and diplomacy; high tolerance for ambiguity.

Other Contract Staff/Consultants

Infopeople uses a number of contract consultants on a regular basis. This cadre of consultants collectively has a wide range of expertise, so Infopeople can draw on them as needed, depending on the task at hand. Consultants with whom Infopeople works on a regular basis include Joan Frye Williams, Mary Minow, Nancy Nerenberg, Jennifer Jacobs, and Troy Arnold. These consultants are used for the following:

Joan Frye Williams: Joan functions as the general Infopeople management consultant, providing general policy, planning, staffing, and marketing advice. She also delivers webinars, podcasts, speaks at Eureka! events, and facilitates meetings both face-to-face and virtual. She provides initial bullet points for many Infopeople courses. Her major Infopeople assignment in 2013/14 will be to work with the Project Director to complete a business plan for Infopeople.

Mary Minow: Provides legal advice to Infopeople and presents webinars on legal topics.

Nancy Nerenberg is responsible for providing comprehensive support to the trainers and students in online courses, including:
- Putting trainers’ materials into the Moodle courseware;
- Providing quality control for Moodle course content;
- Assisting with access and other technical issues related to Moodle;
- Analyzing course evaluations and providing reports.
Nancy also functions as backup to the Web Manager. Because of increased workload, Nancy uses/supervises subcontractor to assist with putting up course content.

Jennifer Jacobs occupies a new position created in 2012/13 because of the increased workload for webinars as a result of Infopeople’s support of numerous partner projects. This is her position:

Title: Webinar Production Assistant
Under supervision of webinar producer:
1. Post documents for use in live webinars in Adobe Connect
2. Produce live webinars
3. Conduct debrief call with presenters post-live events
4. Edit and post archived versions of live webinars
5. Act as backup to web manager for linking webinar documents on Infopeople website
6. Provide webinar support for partner projects as assigned by webinar producer
7. Provide post-production assistance for archived webinars (conversion of archives to alternate formats, fix broken links, etc)
Troy Arnold is the programmer who developed, maintains, and makes improvements in the Tracker used to manage the Infopeople training program.

**Trainers**

Infopeople would be nothing without its trainers, all of whom are independent contractors. Individual Infopeople trainers are subject specialists. Once Infopeople determines that training is needed in a particular area, the Lead Training Consultant identifies experts in that area and contacts them in regard to training for Infopeople. The Lead Training Consultant works with each trainer through the initial stages of training development, which includes the development of the curriculum and the preparation of a public announcement or marketing piece. Once the announcement is approved by the Project Director, the Lead Training consultant either continues to work with the trainer or assigns them to one of the other Training Consultants. One of the Training Consultants works with the trainer on the development of course materials, presentation skills, learning exercises, timing, and support materials. The Training Consultants attend training sessions and provide detailed verbal and written feedback to the instructors.

While some instructors – Francisca Goldsmith, Cheryl Gould, Laura Solomon, Mary Minow, Penny Peck, Roy Tennant, Dawne Tortorella -- teach more than one course for Infopeople, the majority of instructors, as subject experts, teach only one course or a series of related courses on a single topic. Biographies of Infopeople instructors are included as Attachment #16.
Current Infopeople Instructors and Presenters, 2013/2014

Ann Awakuni - Ann Awakuni has worked in public libraries for almost 20 years in a variety of different capacities. She is currently a Technology Librarian in the Adult & Virtual Services department of the Mountain View Public Library where she splits her time between working the public desk, developing collections and programs, and being the library webmaster and ebook guru. A 2008 Eureka Library Leadership Institute fellow, Ann is currently in the process of creating one of the first Makerspaces in a California public library. In 2012, Ann won an Infopeople scholarship to attend the very first RSquared Conference in Colorado. The R2 experience inspired Ann to seek out new ways of engaging her community with out-of-the-box adult program ideas, which she shares in her course on Adult Programming.

Lori Ayre - Lori Bowen Ayre is a nationally recognized expert in automated materials handling, RFID and open source library system software. Since 2000, she has worked with a wide variety of city and county libraries and consortia in the areas of materials handling, delivery, workflow optimization, RFID, resource sharing, Internet filters, public access computing, and emerging technologies.

Debbie Baaske - Debbie Baaske is the Special Projects Manager at Innovation Experts. She has managed the MyMediaMall Overdrive consortium since its inception in 2005, coordinating the shared collection of over 65 Illinois libraries, which includes audiobooks, eBooks, and videos. Formerly, as the Special Projects Manager at the North Suburban Library System in Illinois, she also managed a consortium of digital images, a shared catalog, and continuing education (in-person and online) for library personnel. Debbie was also a certified, Crucial Conversations trainer who trained all library system staff and many area librarians throughout Illinois. Prior to that, Debbie worked as a trainer for Endeavor Information systems, and traveled all over the country to over 60 libraries to provide top-notch training.

Peggy Barber - Peggy Barber and Linda Wallace are principals and co-founders of Library Communication Strategies, Inc., a consulting firm based in Chicago. As part of their mission to help libraries market themselves more effectively, they have worked extensively with libraries of all sizes to do communication audits, develop marketing communication plans and lead workshops on marketing-related topics. They are the authors of Building a Buzz: Libraries & Word-of-Mouth Marketing published by ALA Editions in 2009.

Ira Bray - Ira Bray has over a decade of experience with the collection and reporting of public library statistics. While State Data Coordinator for California at the California State Library he managed the yearly cycle of survey design, survey deployment, collection, inspection and review of more than one hundred data elements submitted by one hundred eighty one library jurisdictions with more than one thousand outlets. He was elected by fellow State Data Coordinators to serve on the Library Statistics Working Group to advise the Institute of Museum and Library Services (IMLS) on public and state library statistics issues and served from 2006 to 2010.
Cen Campbell - Cen Campbell is a children's librarian at the Santa Clara County Library District and the Mountain View Public Library, and a children's digital services consultant at LittleeLit.com. She has driven a bookmobile, managed branch libraries, developed innovative programs for babies, young children and teens, and now helps other libraries incorporate digital media into their early literacy programming. She attended the California State Library’s Eureka Leadership Institute in 2008 and now serves on the ALSC Children & Technology committee.

Michael Cart - Michael Cart is a nationally known expert in the field of young adult literature and of adult books for young adults. Currently a columnist and reviewer for ALA's "Booklist" magazine, he is also the author and/or editor of twenty books including such anthologies as "Love and Sex: Ten Stories of Truth" and "How Beautiful the Ordinary: Twelve Stories of Identity." A new and expanded edition of his critical history of young adult literature "From Romance to Realism" has just been published by ALA Editions. He is also co-author with Christine Jenkins of "The Heart Has Its Reasons," a history of gay, lesbian, bisexual, and transgender literature for young adults.

Linda Clark - Linda Clark began census work in the 1970s as a Special Census Supervisor for California's Population Research Unit in the Department of Finance. In 1980 she started her career with the Census Bureau as a Regional Technician in Los Angeles, monitoring field operations in southern California. In 2000 she became an Area Manager for the Seattle region, supervising field operations for the seven census offices in San Francisco, Alameda, and San Mateo counties. After a 4-year tour as Team Leader in the Recruiting branch at Census headquarters in Washington, D.C., Linda returned to the West Coast as the Information Services Specialist for the Seattle region, the position she holds today.

Kimberly Bolan Cullin - Kimberly (Kim) Bolan Cullin is an experienced librarian, consultant, and author with a broad background in libraries. Kim is the principal consultant of Kimberly Bolan & Associates, LLC and an Associate Principal Consultant for Providence Associates.

Linda Demmers - As a library consultant, Linda Demmers has extensive experience in library facility planning with professional background as a librarian, planning consultant, and owners' representative on a wide variety of new construction and renovation projects. She specializes in planning process, program documentation, broad-based community and user involvement, and long-term owner client relationships.

Leah Esguerra - Leah Esguerra, MFT, is a Licensed Marriage and Family Therapist for the San Francisco Department of Public Health and works at the San Francisco Public Library’s Main Library as a Psychiatric Social Worker. Esguerra is the first social worker assigned to work full-time in a library setting. She also trains and supervises five Health and Safety Associates (HASAs, interns who were formerly homeless themselves).

Sarah Flowers - Sarah Flowers is the President-Elect of YALSA, the Young Adult Library Services Association, fourth-largest division of the American Library Association. She has worked in California public libraries since 1992, as a young adult librarian, supervisor of adult and teen services, community librarian, and, until she retired in 2009, as Deputy County Librarian for the Santa Clara County library.
Beth Gallaway - Named a Mover and Shaker by Library Journal in 2006, Beth Gallaway is currently the Assistant Director at the Haverhill (MA) Public Library. As an independent library consultant, Beth instructs librarians in how to run teen programs of all types, included gaming and game design, creative writing and Teen Read Week and Teen Tech Week events. She is a continuing education provider for Simmons College Graduate School of Library and Information Science, and for the Young Adult Library Services Association.

Stephanie Gerding - Stephanie Gerding is an independent library consultant and MaintainIT Project contributor and focuses her writing and training on technology, train-the-trainer, and grants topics. She is the author of The Accidental Technology Trainer: A Guide for Libraries (http://www.infotoday.com/books/books/TheAccidentalTechnologyTrainer.shtml).

Francisca Goldsmith - Francisca Goldsmith has worked as an Infopeople instructor since 2000. She has served as Branch Services Director of Halifax Public Libraries (Nova Scotia) and Library Services Manager at Berkeley Public Library (CA). She has managed branch services for a regional library system with urban, suburban and rural areas, served as the collection management librarian and head of teen services, and provided reference services in both academic and public libraries. Working with school and public library staff, she has provided training to support up-to-date reference assistance and to design local weeding projects.

Cheryl Gould - Cheryl has been a training consultant for Infopeople since 1996. She has delivered workshops on a wide range of topics including: Increasing computer competency, search skills, Training the Trainer, Word, Powerpoint, Libris Design, Mastering Tough Public Service Situations and Cutting Edge Customer Service Techniques. Recent additions to her toolbox include helping organize library staff days and acting as MC and playground director throughout the day to facilitate people getting to know each other, have a bit of fun and stay energized.

Jason Griffey – Jason Griffey is the Head of Library Information Technology at the University of Tennessee at Chattanooga. His areas of expertise include Information technology usage in higher education, especially as it relates to social networking and workflow, copyright law as it pertains to academia and libraries, and the use of Web 2.0 in the classroom and in academic workflows.

Kelli Ham - Kelli Ham is the Consumer Health Coordinator for the National Libraries of Medicine, Pacific Southwest Region (NN/LM PSR). Kelli helps libraries and community organizations provide quality health information services to the public. Kelli develops presentations and training materials with a focus on health literacy, new technologies for delivery of health information, and services to special populations. Kelli created the Health e-Show series of webinars in 2008 for Infopeople, covering a variety of consumer health topics for public librarians.

Nate Hill – Nate Hill is an Assistant Director at the Chattanooga Public Library, where he leads The 4th Floor project. The 4th Floor is a 14,000 square foot flexible community library space: some days it is a makerspace, others it is a coder dojo or hackerspace, and still others it serves as an event, production, and presentation space. In addition to his work in Chattanooga, Nate serves as a co-chair of the Digital Public Library of America's Marketing and Outreach
Committee, and he's been recognized by the Bill & Melinda Gates Foundation as an American representative for the International Network of Emerging Library Innovators (INELI) program.

Holly Hinman - Holly Hinman started her library career in a small rural library in Massachusetts when, at the age of 12, she was paid 25 cents an hour to read stories to younger children and shelve books. She has an M.A. in Library Science from the University of Chicago and has worked in academic, special, law, and public libraries over her long career. She was the director of the Metropolitan Cooperative Library System (now the Southern California Library Cooperative) for twelve years, and subsequently served as Library Services Manager in Beverly Hills and Library Director in Burbank before starting Infopeople at the request of State Librarian Gary Strong in 1994. Holly has taught Public Library Management at UCLA, did much of the early Infopeople training, and continues to teach grant writing. She is active in the California Library Association, having served as President in 1986.

Brenda Hough - Brenda Hough is a library consultant and educator. She currently coordinates continuing education for the Northeast Kansas Library System. She has previously held positions with TechSoup for Libraries, The Bill and Melinda Gates Foundation, and the Lake Agassiz Regional Library System (Minnesotta). She has delivered webinars and taught courses for the Public Library Association (PLA), WebJunction, Emporia State University (Kansas), and the University of Illinois - Urbana Champaign’s Certified Public Administrator Program.

Robert Karatsu - Robert Karatsu is the Library Director for Rancho Cucamonga Library Services. He has also taught reference for 10 years in the San Jose State University’s School of Library and Information Sciences. He was a participant in the first Stanford University’s Institute on 21st Century Librarianship in 2000, and was a Eureka Leadership Institute mentor in 2011 and 2012.

David Lee King - David Lee King is the Digital Services Director at Topeka and Shawnee County Public Library, where he plans, implements, and experiments with emerging technology trends. He speaks internationally about emerging trends, website management, digital experience, and social media, and has been published in many library-related journals. David was named a Library Journal Mover and Shaker for 2008.

Kathleen Lee - Kathleen Lee has been a Health and Safety Associate (HASA) at the San Francisco Public Library since October, 2010, before which she and her partner owned a painting and restoration business in Sacramento. During the economic downturn in 2009, they lost their business and became, for the first time, homeless. Through services provided by the City and County of San Francisco and the Homeless Outreach Team, Kathleen and her partner have since been able to recover from homelessness.

Carla Lehn – Carla Lehn has over 25 years experience working with nonprofit organizations as a manager, volunteer administrator, and technical assistance provider, developing and managing projects on a local, state, regional and national level. Carla served for several years as an outside consultant for the State Library, working with California libraries on volunteerism, board, and community development issues. Carla’s current assignments at the State Library include Literacy, the statewide Rural Library Initiative, LSTA and Outcome Measures projects, in addition to volunteerism, board and community development.
Xiaoli Li - Having worked in both public and academic libraries, Xiaoli Li has a wide range of experience with cataloging. She is an active advocate for continuing education and a trainer for "Cataloging for the 21st Century," a Library of Congress initiative. She has made numerous presentations and authored several journal articles on serials control. She chaired OCLC Post Pinyin Conversion Cleanup Project and planed several major projects for the libraries where she has worked, including Yale University Libraries, University of Washington Libraries, and most currently UC Davis.

Chad Mairn - Chad Mairn is a librarian, teacher, author and ‘technofile’ who frequently shares his enthusiasm for ‘all-things technology’ as a speaker at library and technology conferences. He is an Information Services Librarian and adjunct professor at St. Petersburg College in Florida and is also the Chief Technology Officer at Novare Library Services, a company he co-founded, whose goal is "to create custom underlying tools to help libraries interact with users, stay true to their goals and to thrive in the 21st century."

Kathy Middleton – Acting Deputy County Librarian, Contra Costa County Library.

Michele Mizejewski - Michele Mizejewski is the Digital Image Manager for the Art & Art History Department at Santa Clara University. Previously, she worked as Electronic Services Librarian at Redwood City Public Library. She has taught online workshops on social software for Five Weeks to a Social Library and for Simmons GSLIS CE, as well as in-person workshops all around CA for The Infopeople Project. She also speaks on Web 2.0 topics, most recently at The Future of Libraries conference in San Francisco.

Jacob Nadal - Jacob Nadal was appointed as the Preservation Officer for the UCLA Library in 2008. Previously, he served as the Field Service Librarian and Acting Head of Collections Care at The New York Public Library, and as Head of the Craig Preservation Laboratory at Indiana University. He is an active member of the American Library Association and serves on the steering committee for the California Preservation Program.

Eileen O'Shea – Eileen O'Shea is an Infopeople consultant. She acts as the technology coordinator for Infopeople, and steers Infopeople's social media efforts. She also develop both print and screencast tutorials, and directs Infopeople online learning initiatives and produces webinars and podcasts.

Ray Patchett – Ray Patchett served as Carlsbad City Manager from 1987-2007. He now operates Patchett & Associates, a business that provides consulting services fostering community excellence, organization effectiveness, individual coaching and personal growth.

Penny Peck - Penny Peck has been a children's librarian for 25 years. Before that, she was Snow White and Mother Goose at Children’s Fairyland in Oakland, ran a nightclub, worked as the wardrobe mistress for the Berkeley Ballet, and was an agent for a standup comedian. Her experience includes performing thousands of children's storytimes, leading hundreds of book club discussions for students in grades 4-12, conducting hundreds of school tours and assemblies, reviewing children's books and media, and conducting the Performers' Showcase for auditioning library entertainment.
Michelle Perera - Michelle Perera is the Assistant Library Director for Rancho Cucamonga Library Services, where she has worked for 19 years. She is also a Board member for the California Library Association. Michelle holds a BA in English and a Master of Library Science. Michelle has also worked for Upland, Glendora, and San Marino Libraries, and taught for 7 years for the SJSU SLIS program. Michelle attended the Stanford-California State Library Institute on 21st Century Librarianship in 2001, received the CLA Award for Excellence as a Public Librarian in 2008 and most recently was named a Library Journal “Mover and Shaker” for 2013.

Laurie Putnam - Laurie Putnam has been managing writers, editors, publications, and publishing departments for two decades. Since 2004, she has been teaching professional writing and publishing to future librarians in San Jose State University’s School of Library and Information Science. Laurie also runs a communications business based in Monterey, California, where she leads the development of publications and communications programs for libraries, nonprofit organizations, and high-tech companies. Prior to forming her own business, Laurie was director of branding and marketing communications at Aspect Telecommunications in San Jose.

Mary Ross - Mary Ross has over 25 years of experience working in public libraries and managed the staff training and development program at the Seattle Public Library for eight years. In addition to an MLIS, she has certificates in online learning design and in online classroom facilitation. Under contract to the Washington State Library, she designed "Anytime, Anywhere Answers" and "The Virtual Reference Adventure," online training programs for virtual reference providers. She has also designed courses for WebJunction and LibraryU.

Aaron Schmidt – Aaron Schmidt is a principal at Influx Library User Experience Consulting and maintains a library and website usability weblog, walkingpaper.org. He has presented on the topic of library technology and usability throughout the United States, and in Canada, the UK, the Netherlands and Spain. In 2005, Schmidt was named a Library Journal “Mover & Shaker.”

Becky Schreiber & John Shannon - Becky Schreiber and John Shannon are skilled professionals in organization development who have served clients in private industry and government for more than 25 years. They assist organizations in re-inventing themselves to respond quickly to customer expectations and a changing marketplace. Toward that goal, they work with customers to align their entire organization to commonly held values, vision, and strategies. They help clients develop capacity to capitalize on the dynamic forces of change that are unleashed once an organization is in motion. Since involvement generates commitment, the key element is building a "critical mass" of employees committed to the change.

Laura Solomon - Laura Solomon, MCIW, MLS, is the Library Services Manager for the Ohio Public Library Information Network and the former Web Applications Manager for the Cleveland Public Library. She has been doing web development and design for over 12 years in public libraries and as an independent consultant. She specializes in developing with Drupal, as well as in web code and accessibility standards. As a former children’s librarian, she enjoys bringing the "fun of technology" to audiences and in giving libraries the tools they need to better serve the virtual customer.
Linda Stewart – Linda Stewart is an Adjunct Librarian in charge of Digital Initiatives at Pasadena City College.

Karen Strauss - Currently the Acting Chief of the San Francisco Public Library Main Library, Karen Strauss has been an outreach librarian and manager on a senior services bookmobile; launched a program of volunteers taking library materials to patrons homebound with HIV/AIDS; and coordinated the operations of the Library’s community services directory. Along with her colleagues, Strauss’s efforts to provide social services to homeless SFPL patrons developed into a partnership with the San Francisco Department of Public Health (DPH) and resulted in placing members of DPH’s Homeless Outreach Team in the Main Library in 2006. In 2009, SFPL and DPH placed the nation’s first psychiatric social worker full-time in a public library.

Stanley Strauss – Until his recent retirement, Stanley Strauss worked at the Cerritos Library, Cerritos, California, in a variety of positions, including Head of Children's Services, Public Services Librarian, and Administrative Services Manager. As a member of the four-person Cerritos Library Expansion Planning Team his major responsibility included analyzing, designing and implementing all services for the "library of the future," which opened in March 2002. He is now a consultant for Infopeople.

Jennifer Sweeney - Since 2009, Jennifer Sweeney has been teaching in the MLIS program in the College of Information Science and Technology at Drexel University, focusing on LIS research methods, information literacy curriculum design, and information sources and services. She spent over 14 years as a reference librarian in academic and business libraries, and 15 years as an evaluation specialist for public library programs and services, academic library operations, and nonprofit organizational change and public service programs.

Roy Tennant - Roy Tennant is Senior Program Officer in the Research division of OCLC, where he works on a number of programs and projects to help OCLC partners maximize their impact and effectiveness for their respective institutions. In his prior job at the California Digital Library, he was instrumental in the development and deployment of the eScholarship Repository and the eScholarship Editions publishing services.

Sally Thomas – Sally Thomas is a librarian at Hayward Public Library. She leads a popular book group focused on literary fiction, and has collaborated with local organizations to sponsor author appearances, including several organized in conjunction with NEA Big Reads. She is a 2010 Eureka! Leadership Institute fellow.

Dawne Tortorella - Dawne Tortorella is owner and founder of BellCow, Inc, a technology consulting firm. BellCow, Inc. provides technology support for a wide range of organizations, including libraries, educational institutions and non-profit organizations. Prior to founding BellCow fifteen years ago, Dawne served as Director of Academic Computing and Administrative Computing at DePaul University for 12 years and served as the IT Director for the National Alzheimer’s Association.

Dave Tyckson - Dave is the Associate Dean of the Henry Madden Library, California State University - Fresno. He came to Fresno as Head of Reference in 1997. He has been involved
with reference service for 30 years and has written extensively about reference service, reference collections, and the reference interview. He is the current chair of the Reference Books Bulletin, a section of Booklist, which is one of the oldest continuous sources of reviews of reference sources.

Dana Vinke – Dana Vinke is Principal Librarian of Operations at Torrance Public Library. In this position she plans, organizes and manages the activities of a major service area such as public or operational services; performs long range planning for library collections and automated resources; services as technical resource for staff and the City Librarian; and performs related work as required.

Linda Wallace – Peggy Barber and Linda Wallace are principals and co-founders of Library Communication Strategies, Inc., a consulting firm based in Chicago. As part of their mission to help libraries market themselves more effectively, they have worked extensively with libraries of all sizes to do communication audits, develop marketing communication plans and lead workshops on marketing-related topics. They are the authors of Building a Buzz: Libraries & Word-of-Mouth Marketing published by ALA Editions in 2009.

Joan Frye Williams - For more than 25 years Joan Frye Williams (joan@jfwilliams.com) has been a successful librarian, consultant, vendor, planner, trainer, evaluator and user of library services, with a special emphasis on innovation, technology and emerging library trends. Her many clients include large and small public libraries, library consortia, state library agencies, professional library associations, library boards, library vendors and architects. Joan is best known as an acute--and sometimes irreverent--observer of trends in what she calls "the cultural anthropology of libraries." She is a nationally recognized library futurist and designer of innovative library services.

Colleen Willis - Colleen Willis has spent the last eleven years working as a children’s librarian for the Anaheim Public Library. She got her start in storytelling because she can imitate a pig snort that can be heard all the way from the back of the room. That and her excellent puppetry skills were enough to hook her on children’s storytimes. Her main objective as an instructor is to motivate her fellow storytellers to inspire families with the joys of storytelling and to help them to become life-long library users.

Julie Winkelstein - Julie Ann Winkelstein has held a variety of positions, from jail and prison librarian to family literacy coordinator to children’s, teen and adult services librarian to newspaper columnist. She returned to school in 2008 and received her PhD in Information and Communication in 2012. Her dissertation focused on homeless LGBTQ youth and public libraries and brought together her twin interests of social justice and public libraries.
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Revised 4/4/2013

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