

Lifelong Access

L I B R A R I E S

Redefining public library services to older adults

Lifelong Access Libraries Centers of Excellence Final Report

May

2009

UNC
Evaluation of
the Lifelong
Access
Libraries
Centers of
Excellence



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**Libraries for the Future
Lifelong Access Libraries
Centers of Excellence
Final Report**

May 2009

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UNC involvement in the LAL initiative has involved multiple investigators, project managers and research assistants over a four year period (2006-2009). UNC faculty members have also served as Institute speakers and evaluation consultants. We have also benefitted from the support of the deans of the LIS programs at UNC Chapel Hill and North Carolina Central University, the State Librarian and leaders in the aging services community in North Carolina, particularly Dennis Streets, director of the NC Division of Aging and Adult Services. Dean Jose-Marie Griffiths from SILS provided the first contact with LFF and encouraged the research team to take on the evaluation. We would like to thank all those involved for their continuing support and dedication.

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Executive Summary

Statement of Purpose

The Lifelong Access Libraries (LAL) initiative of Libraries for the Future (LFF) aimed to transform library programs and services to older adults with a particular focus on active older adults. As part of this initiative, LFF provided training and seed funding for five demonstration Centers of Excellence to serve as models for libraries across the country. This report uses data gathered from four of the five Centers of Excellence including the Allegheny County Library Association, the Phoenix Public Library system, the New Haven Free Public Library system and the Northeast Massachusetts Regional Library System. The fifth Center of Excellence, the North Carolina Collaboration on Lifelong Learning and Engagement (NCCoLLE), is not included in this report since NCCoLLE is in the process of being developed. A NCCoLLE Development Plan has previously been submitted to LFF.

The goals of this evaluation report are to:

1. Understand the programs and services for older adults and how they are implemented
2. Enumerate the most important lessons learned from these experiences
3. Discuss the implications of the lessons learned for:
 - Libraries/systems trying to serve older adults with innovative programs and services
 - Libraries For the Future (LFF) or other parties trying to support such efforts
 - Entities (e.g. associations, organizations, or collaboratives) trying to build momentum for these types of transformations in older adult services in public libraries.

Implementation of Programs and Services for Older Adults

Programming and services that were offered differed from one Center to another depending on several factors, including the desires of patrons identified during community needs analysis, the resources available for developing programs and services, the collaborations formed with other community organizations and funding agencies, and local operating structures and practices. In addition to offering arts, cultural, literary, computer, and health programming, libraries expanded collections and spaces for adults to gather for leisure or civic engagement.

Finite resources are an issue for any organization but limitations of staff time and space impacted every Center studied. Although other barriers existed, these two factors were cited most frequently. Libraries that collaborated with community organizations were able to secure additional funding, manpower, and sometimes spaces to host new programming. Demonstration of well-attended, quality programming in some cases strengthened the will of government and private funders to sustain program offerings, staff, collections, and spaces for older adults. Staff training and enthusiasm and a centralized coordinator for older adults facilitated success.

Lessons Learned

The most promising practices were as follows:

- Understanding the community context: Get demographic information and input from older adults
- Dedicating a system-wide coordinator to older adult programming
- Creating partnerships with community organizations

Implications for Stakeholders

Libraries can develop and sustain services to older adults by:

- Providing support and training on the most effective ways to conduct needs assessment and program evaluations so that programming matches the priorities and interests of community members
- Sharing evidence-based practices on how to create and market successful programs
- Gathering feedback from patrons on what kinds of barriers (e.g. transportation, location, time offered, etc.) can prevent them from attending more programs and/or volunteering, and then work with partners to address those barriers
- Dedicating a system-wide coordinator to generate healthy peer pressure to ensure follow-up on group objectives, apply for and allocate outside grant funding, serve as a central point-person for community partners, and engage in local and/or virtual communities of practice that support innovative adult programs and services
- Providing a clearinghouse of resources (training, aging news, etc.)

Community collaborators can improve the success of programming by:

- Helping the libraries directly reach new older adult audiences
- Helping the libraries market to new older adult audiences
- Leveraging organizational funding to enable more programs and services
- Leveraging grant funding to enable more programs and services
- Increasing the visibility of the library in the community

Advocacy organizations can assist in this process by:

- Offering training materials in a variety of formats so that staff who cannot travel to attend training can still benefit from expertise in best practices for needs assessment, program evaluation, marketing and promotion
- Supporting a Community of Practice so that librarians across the country can share ideas and be motivated by stories of success
- Offering training related to aging and best practices in service provision
- Helping coordinators to seek funding and to craft effective grant applications
- Advocating for the transformation of older adult programs and services nationwide
- Promoting the concept of “libraries as partners” across the country
- Helping libraries identify community partners
- Identifying national leaders of potential community partners and encouraging collaboration with libraries

Introduction

Statement of Purpose

The Lifelong Access Libraries (LAL) initiative of Libraries for the Future (LFF) aimed to transform library programs and services to older adults with a particular focus on active older adults. As part of this initiative, LFF provided training and seed funding for five demonstration Centers of Excellence to serve as models for libraries across the country. This report uses data gathered from four of the five Centers of Excellence including the Allegheny County Library Association, the Phoenix Public Library system, the New Haven Free Public Library system and the Northeast Massachusetts Regional Library System. The fifth Center of Excellence, the North Carolina Collaboration on Lifelong Learning and Engagement (NCCoLLE), is not included in this report since NCCoLLE is in the process of being developed. A NCCoLLE Development Plan has been submitted to LFF.

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Overview of the LAL Initiative

Lifelong Access Libraries (LAL) is an initiative aimed at transforming libraries into centers of lifelong learning and civic engagement for active older adults. The goal is to develop a model of library services aimed at serving the Baby Boomer generation as they reach retirement age. Hanging a sign for “seniors” won’t work for this generation, who are healthier, more active, and have more potential for community service than their elders. By providing connections to meaningful work, creative retirement, and lifelong learning, public libraries can recharge themselves, millions of individuals, and all our communities.

The mission of Lifelong Access Libraries initiative, as defined by Libraries for the Future (LFF), is aimed at causing fundamental change in how public libraries define, create, and deliver their services to active older adults, a segment of the population that is growing rapidly across the nation.

LFF has defined three goals for LAL:

1. Create a distinctive specialty within adult services by focusing on active, engaged older adults.
2. Establish Lifelong Access in five demonstration regions as a practical framework for library services.
3. Promote public and private investment in libraries as centers for productive aging.

As this report was being finalized LFF announced that it was closing on March 18, 2009. Although LFF has ceased operations this report will continue to be useful to those who have been involved in LFF since it was founded over 17 years ago as well as other organizations interested in lifelong learning and civic engagement for older adults. In particular, the report is being used to inform development of NCCoLLE as a statewide implementation of many of the principles found in the Lifelong Access Libraries initiative.

LFF was founded in 1992 during a time of deep funding cuts to champion libraries at the national level and to help individual libraries become leaders in technology, community development, cultural vitality and democratic participation. Built upon the vision of writer and activist Harriet Barlow and a small group of library advocates, LFF was the first national citizen-advocacy group to uphold the free, public library as a vast potential resource in our midst. Diantha Dow Schull provided inspired leadership to LFF and the Lifelong Access Libraries initiative which was funded by The Atlantic Philanthropies Foundation.

Overview of UNC Involvement in the LAL Initiative

The School of Information and Library Science (SILS) and the UNC Institute on Aging (IOA) have received several related contracts from LFF for evaluating aspects of the LAL Program. This UNC partnership received three contracts to evaluate the three annual LFF Leadership Training Institutes hosted in Chapel Hill, NC from 2006 to 2008. A fourth contract with the UNC research team provided for an evaluation of the LAL Centers of Excellence as identified by LFF in 2007. This report serves as the final deliverable for this fourth contract.

LFF Leadership Training Institutes Hosting and Evaluation

LFF sponsored three Leadership Training Institutes hosted in Chapel Hill, NC from 2006 to 2008, and the UNC partnership was hired to evaluate these Institutes. Reports were submitted as follows:

- The preliminary report of the July 30-Aug 4, 2006 Institute was submitted to LFF in November 2006.
- In August 2007, we sent the final report of the 2006 Institute and the preliminary report of the July 29-August 3, 2007 Institute. All final reports include the results of a follow up survey sent to the Institute Fellows six months after the Institute.
- In March 2008, we submitted a full preliminary report for the 2007 Institute.
- In February 2009, we submitted the final report for the 2007 Institute and the preliminary report for 2008. The six-month follow up of the 2008 Institute Fellows is in progress.

For convenient reference, the three final reports of the 2006, 2007 and 2008 Institutes will be submitted to LFF in April 2009 along with this Centers of Excellence report.

Centers of Excellence Evaluation

Evaluation of the four Centers of Excellence has taken the form of in-depth case studies employing a mixed-methods approach to data collection using semi-structured interviews, focus groups and surveys. Two day or virtual site visits were conducted at the following centers:

- Phoenix Public Library (June 18-19, 2007)
- Allegheny County Library Association (August 27-28, 2007),
- New Haven Free Public Library (December 13-14, 2007) and
- Northeast Massachusetts Regional Library System (January-February, 2009)

The sites are frequently referred to in the report as Phoenix, Allegheny, New Haven and NMRLS respectively.

Key informant interviews were done with library staff and community collaborators and focus groups were conducted with library staff and library users where appropriate. Since NRMLS provides support services to the entire northeastern part of Massachusetts, data collection has involved a series of telephone interviews with NRMLS staff as well as library staff throughout the region and their community partners. Interviews and focus groups from the visits have been transcribed and coded for themes. NVivo 7.0 was used for thematic analysis.

Centers of Excellence Evaluation Methodology

Data

Data for this report come from four sources: two types of focus groups (Library Users and Library Staff) and key informant interviews broken up into two types (Library Staff and Community Collaborators). The detailed data and methodology section for each of the four sources is provided in Appendix A. Briefly, the authors use data from a total of three library user focus groups (n=18), three library staff focus groups (n=24), eighteen library staff key informant interviews and fourteen community collaborator key informant interviews.

The focus groups and the interviews were semi-structured, giving the moderator the ability to navigate the schedule to address topics identified as interesting. Some questions had scripted probes but researchers were flexible in adapting and probing participants for fully developed explanations to the questions.

The Library Staff and Library User focus groups addressed the following topics from the two perspectives:

- current LAL programming,
- the future of LAL programming, and
- how libraries can remain relevant.

The interviews with library staff were focused on understanding the history, development, current state, and future of LAL programming in the libraries. Key topics included

- program support,
- staff training,
- program facilitators and barriers,
- evaluation, and
- the future of LAL programming.

The community collaborator interviews explored the following topics:

- the relationship between libraries and the partnered organizations,
- facilitators and barriers to LAL programming, and
- the needs of the aging community.

Focus group and key informant interviews were conducted at the following Centers of Excellence, as identified by Libraries for the Future:

- Phoenix Public Library (PPL) on June 18 and 19, 2007
- Allegheny County Library Association (ACLA) on August 27 and 28, 2007
- New Haven Free Public Library (NHFPL) on December 14, 2007.

Key informant interviews were conducted by telephone (except for one community collaborator who preferred to answer by mail) for the following Center of Excellence. No focus groups were conducted for this Center.

- Northeast Massachusetts Regional Library System (NRMLS) in January and February, 2009

Respondents completed a short demographic survey. Descriptive Statistics were compiled using SPSS 15.0 and demographic profiles for each data source are located in Appendix A.

The content of the focus groups and interviews was transcribed and entered into a qualitative data analysis program (NVivo 7.0). Using this software program, transcripts were coded and major themes were identified.

The three main aims of our report are to synthesize these data sources in an attempt to

- understand the library and community context of the Centers,
- identify implementation barriers and facilitators, and
- make some general recommendations for stakeholders interested in fielding or supporting transformed older adult programs and services.

Each of these aims engaged the qualitative data sources differently, so in the text the authors will point to the type of data used and the position of the speaker when quotes are used.

Part 1: The Four Centers

General Overview

Brief profiles for each Center as listed below give information on:

- Structure of the library (or system), including number of branches
- Staff involved in LAL programming
- Community partners
- Program/services overview
- History of program
- State/national contributions
- Funding
- Key accomplishments
- Website
- Key contact

Following the individual Center profiles, some comparisons will be drawn.

Phoenix Public Library Overview

Library Description

A city-funded public library system serving Maricopa County. The library system is composed of 15 branches including the central library, Burton Barr Central. A 16th branch, Agave Library, is under construction and set to open in 2009.

In total, the library employs just over 360 people, is housed in 511,732 square feet, includes 1,929,402 items in its collections, and offers 446 public computers with internet access.

Phoenix Public Library Branches

Burton Barr Central
 Acacia
 Century
 Cholla
 Desert Sage
 Harmon
 Ironwood
 Juniper
 Mesquite
 Ocotillo
 Palo Verde
 Saguaro
 Yucca
 Desert Broom
 Cesar Chavez
 Agave – under construction

Affiliate Libraries	Emily Center Affiliate Library Heard Museum Affiliate Library Phoenix Art Museum Affiliate Library George Washington Carver Museum and Cultural Center Library
Staff Involved in LAL Programming	Four staff averaging 20 hours per week, including three staff members researching Baby Boomer interests and information needs and developing guidelines for system-wide collections and activities. There is a designated LAL contact person in each branch.
LAL Community Partners	Area Agency on Aging Arizona Attorney General's Office, Office of Community Services Arizona Foundation for Legal Services and Education Arizona State University, College of Human Services Center D.O.A.R. City of Phoenix, Human Services Department, Senior Services Division Foundation for Senior Living Fresh Start Women's Foundation Friends of the Phoenix Public Library Jewish Children and Family Services, ElderVention Program OASIS Phoenix College, Lifelong Learning Program Library Advisory Board
Key Features	A system-wide program to develop services and programs for people ages 50 and older called 50 Plus.
Program and Services Overview, Focusing on Midlife Adults	http://www.phoenixpubliclibrary.org/fiftyplus.jsp
History of Program	In 2002-2003, Library Director Toni Garvey co-chaired Maricopa County Commission on Productive Aging, sponsored by Libraries for the Future and Civic Ventures. Since then, key staff have received training in the Lifelong Access Libraries program through LFF's statewide EqualAccess program and the 2006-2007 Lifelong Access Libraries Institutes. In 2004, Phoenix Public Library identified development of services for residents 50 years and older as a system-wide priority and received an LSTA planning grant to determine programs and services based on responses from focus groups.

State & National Contributions

Library Director Toni Garvey co-chaired the Maricopa County Commission on Productive Aging in 2002, helping to initiate the Life Options Libraries Project in Maricopa County, AZ and similar projects nationwide.

She participated in *Designs for Change: Libraries and Productive Aging*, a national forum co-sponsored by the Institute for Museum and Library Services and Americans for Libraries Council, in September 2005.

Principal Funders

LSTA
The Atlantic Philanthropies

Key Accomplishments

The greatest accomplishment has been developing community partnerships with the library as focal point for programs and services provided by partner agencies. Another accomplishment was the award of an LSTA grant, which allowed for the hiring of a consultant to evaluate data from focus groups and make recommendations, the creation of a bookmark to raise awareness of the Library, and its partners and the purchase of additional library materials for the lifelong learning collection. A menu of older adult programming, including community partner and cost, also was developed and distributed to all the branch libraries. The development of the 50 Plus website as an information clearinghouse for older adults was another accomplishment. The challenge was and still is staff time to accomplish the activities and goals.

Website

www.phoenixpubliclibrary.com

Key Contact

Toni Garvey
City of Phoenix, Library Department,
Burton Barr Central Library
602.262.4735

Allegheny County Library Association Overview**Community Description**

All (43) public libraries in Allegheny County Pennsylvania. Total service population of 822,623 residents

Library Description

The Allegheny County Library Association (ACLA) is a registered non-profit corporation designated as a federated library system by Pennsylvania's Office of Commonwealth Libraries. The territory covered by the Association includes all (43) public libraries in Allegheny County Pennsylvania, serving a population of 822,623.

Staff Involved	Seven staff members
Community Partners	<p>Barnes & Noble Booksellers Carlow University Carnegie Mellon University's Academy of Lifelong Learning (ALL) Elderhostel Generations Together Highmark Working Hearts LifeSpan National Fatherhood Initiative OASIS Pittsburgh Opera Pittsburgh Symphony University of Pittsburgh's Institute on Aging University of Pittsburgh's Osher Lifelong Learning Institute (OLLI)</p>
Key Features	<p>PALs Book Clubs (2004 AARP Library Services for Older Adults Award) Conversation Salons Cultural Programs of music, art, theater and dance Health Talks Author Events LifeLinks for Family Caregivers</p>
Program and Services Overview, Focusing on Midlife Adults	<p>Presentation of continuing education courses geared to Older Adult issues and developmental needs. Establishment of an Older Adult Forum for library professionals interested in and committed to Older Adult programming and services. Academic study, both formal and informal, such as peer learning and university partnerships. Book & Film Discussions Community Conversations & Forums on public affairs, retirement, local issues, etc. Dedicated Staff Expanded Collections Health information and programs Intergenerational activities</p>

History of Program	The dedicated Older Adult Initiative launched in the Spring of 2001. Community partners have helped provide programming, marketing, cost sharing, networking, prestige, visibility and participation in and support of this and other ACLA events, e.g. the One Book One Community program.
State & National Contributions	Has been a leader in organizing and overseeing EqualAccess Libraries™, Libraries for the Future’s professional development program, as a three-year initiative in Pennsylvania, which includes training in Lifelong Access Libraries, a new service model for public librarians to meet the needs of mid-life adults. The Library System has encouraged member libraries to perform outreach and to develop collections and Advisory Councils involving older adults. Jennifer Fox Rabold, president of the Board of Directors, participated in <i>Designs for Change: Libraries and Productive Aging</i> , a national forum co-sponsored by the Institute for Museum and Library Services and Americans for Libraries Council in September 2005.
Principal Funders	State subsidy through Commonwealth Libraries Allegheny Regional Asset District
Website	http://www.aclalibraries.org/acla/home/centerforexcellence.cfm
Key Contact	Marilyn A. Jenkins, Executive Director 412.391.5122 jenkinsm@einetwork.net

New Haven Free Public Library Overview

Library Description The New Haven Free Public Library serves as a resource to provide information, education and recreation to the citizens of the City of New Haven, CT. It lends books, offers timely, accurate reference services, and provides learning resources to support diverse educational goals for the out-of-school citizen. The Library is overseen by a Board of Directors appointed by the Mayor. The Mayor serves as an ex-officio member of the Board. This body is charged with establishing and enforcing the rules and regulations for the management, protection, preservation of library property, and with hiring the [City Librarian](#).

New Haven Public Library Branches The New Haven Free Public Library system includes the Main Library (Ives Branch) in downtown New Haven, four branch libraries (listed below) and a bookmobile. The 50+ Transitions Center is located in the Main Library.

The four addition branch libraries are:

Fair Haven

Mitchell Branch (Westville)

Stetson Branch (Dixwell)

Wilson Branch (Hill)

Staff Involved in LAL Programming

Two staff members are responsible for the 50+ Transition Center, including a part-time director shared with the Volunteer Center for Greater New Haven. The director organizes programs, assists with collection development and outreach, builds partnerships with other community agencies, and engages older adults in volunteer activities at the library and elsewhere.

LAL Community Partners

AARP

City of New Haven, Elderly Services

Volunteer Center of Greater New Haven

Yale University School of Medicine

Elderhostel

Social Security Administration

Key Features

The library's goal is to establish a civic engagement and information resource center for older adults. The 50+ Transition Center connects boomers to popular Community Conversations and many other adult services.

Program and Services Overview, Focusing on Midlife Adults

Arts and Cultural Programming, including book and film discussions, Writers Live programs, and ongoing lecture series.

Civic Engagement, including meaningful volunteer placements with local non-profit agencies and in the library's children's department and computer resource center.

Coalition Building – organizing or participating in multi-partner initiatives that promote community connections and productive aging.

Community Conversations on retirement, transition challenges, and public affairs.

Computer Resources and Training including basic and advanced computer use for communications, research, etc.

Dedicated Space-- An informal café style meeting area is used for special programs; a permanent area for the growing collection is under development.

Dedicated Staff with specific responsibilities for working with active older adults.

Dedicated Webpage providing information and connections to promote productive aging. Still to come: special events section.

Expanded Collections of books and AV materials addressing mature adults' varied concerns including re-careering, health, investments, and creativity.

Intergenerational Activities to promote communications and improve understanding among different age groups, including the Ben Carson Reading Club and Heroes in Our Lives (*see History, below*).

Job, Career and Life Transition Information such as counseling, information, referrals and peer-led programs for re-careering.

Lifelong Learning Programs and Services – informal and formal learning options such as lectures, workshops, book discussions, and academic partnership programs.

Marketing and Outreach to Boomers–Targeted marketing for 50+ Transition Center programs and to encourage mid-life adult use of Consumer Health Information Center and Non-Profit Resource Center.

History of Program

The 50+ Transition Center grew out of the library's participation in Life Options Libraries Connecticut, a grant co-sponsored by Libraries for the Future and the State Library of Connecticut, and funded by the W.G. Graustein Memorial Fund. The library participated in the project as a pilot site, organizing Community Conversations for mid-life adults and forming new partnerships with the Volunteer Center for Greater New Haven and with Yale University. The latter partnership supported the Ben Carson Reading Club, which trained older adult volunteers to help with outreach to schools to build student participation in the library's after-school reading program. The Ben Carson Reading Club helped the library identify and connect with a growing population of residents over 50 years of age seeking community involvement – volunteering, civic activity, and intellectual stimulation. The program's success underscored the significance of the library as a resource for this age group, who are “entirely different from their parents – more active, healthy, wondering what to do next, and not wanting to be considered elderly,” in the words of one program participant.

State & National Contributions

The New Haven Free Public Library helped organize the Connecticut Coming of Age Coalition, a statewide coalition of agencies working with older adults that provides a framework for special initiatives involving midlife adults. Library Director James Welbourne was a presenter at the 2003 Forum and will be one of three special presenters at the upcoming program on Libraries and Productive Aging, co-sponsored by Americans for Libraries Council and Public Library Association, to be held in

Boston in March 2006. James Welbourne also participated in *Designs for Change: Libraries and Productive Aging*, a national forum co-sponsored by the Institute for Museum and Library Services and Americans for Libraries Council in September 2005.

Principal Funders

City of New Haven
 State Library of Connecticut
 Federal LSTA (Library Services and Technology Act) grant
 Americans for Libraries Council

Key Accomplishments

Since establishing the 50+ Transition Center, the library has seen a 20% increase in the number of new people attending older adult programs; a 10% increase in new library card registration; increased circulation of materials associated with topics presented in the lecture series; placements of volunteers at community agencies; and new volunteers carrying out meaningful work at the library.

Website

<http://www.cityofnewhaven.com/library/transition.asp>

Key Contact

Kate Cosgrove
 203.946.7001

Northeast Massachusetts Regional Library System (NMRLS) Overview

Community Description

330 member libraries, including 53 public, 225 school, 13 academic, and 39 special libraries in the Northeast Greater Boston Area. Total service population of 1,192,365 residents

Library Description

The Northeast Massachusetts Regional Library System encompasses 54 communities and serves approximately 1,192,365 residents. The service area stretches from Littleton to the seacoast and from just north of Boston to the New Hampshire border.

Staff Involved

Two employees of NMRLS; more at the individual libraries served by the system

Community Partners

YMCA
 United Way of Massachusetts Bay
 Beverly Council on Aging
 NSCC/Danvers
 American Textile History Museum
 Chelmsford Telemedia (videotaping financial series)
 Roomscape Interiors
 The Art of Living Institute

New England Nutrition Associates
 Dog B.O.N.E.S.
 Reading Lions Club

Key Features

Prime Time Peabody (year-long program at Peabody)
 LiveWires: Boomers and Beyond (ongoing at Reading)
 Lifelong Access Libraries eXchange website

**Program and Services
 Overview, Focusing on
 Midlife Adults**

Financial Fitness series (Chelmsford)
 YMCA Active Older Adult Day Fair

History of Program

Prior to receiving funding from Atlantic Philanthropies to develop a nationwide network of Lifelong Access Libraries, LFF collaborated with NMRLS on The Library Experience: Older Citizens grant approved in 2003. Through this LSTA grant, NMRLS conducted a member survey to obtain a baseline on the current status of programs and services to this segment of the older adult population in the NMRLS service area. In addition, NMRLS member library staff participated in a two-part training institute modeled on the Lifelong Access principles in 2004. A web site (NMRLS Lifelong Access eXchange) and blog (NMRLS Lifelong Access Library Connections) created in conjunction with the grant are still actively maintained.

Two librarians from a NMRLS member facility were named as Fellows for the 2007 Lifelong Access Libraries Institute: Nancy Aberman and Elizabeth Dickinson of Reading Public Library.

**State & National
 Contributions**

Regional Administrator Mary Behrle is active in the Massachusetts Library Association, frequently serving on the conference committee and ensuring lifelong topics are included. In April 2007 she gave a presentation on Lifelong Access in Ithaca, NY. Nancy Aberman has given presentations on the needs of older adults at other regions and at state library association meetings.

Principal Funders

State Library of Massachusetts
 Federal LSTA (Library Services and Technology Act) grant
 Americans for Libraries Council

Website

<http://www.nmrls.org/tlx/about.shtml>,
<http://lifelongaccess.blogspot.com/>

Key Contact

Mary Behrle
 Assistant Regional Administrator

Comparisons: Community Context

Community Demographics

Detailed demographic information, including Census tables, for each of the profiled communities may be found in Appendix B.

Socio-economic/Race-ethnicity Context

Phoenix Public Library informants talked about Hispanic (specifically Mexican), African American, Native American and Asian populations they serve. One informant characterized Phoenix as a “fairly young city,” and Census data confirmed the largest population segment included those in their late 20s to early 30s. Many were young immigrants. English as a second language is an issue for the community; almost 43% of the population identified themselves as Hispanic in the 2007 Census. One informant talked about teaching computer classes in Spanish and teaching ESL classes at the library. One community (Ironwood) stood out as particularly affluent in the interviews but the other libraries were purportedly dealing with issues associated with lower socio-economic contexts. Informants talked about Arizona as being a “retirement state.” Because of the snowbird population, older adult services are not primary in the summer; in those months the focus is on kids and teens.

Allegheny’s community was described as a “mix” with a high proportion of senior residences and long-term care facilities. Here the trend was aging in place, not necessarily senior immigration. Young people were migrating out of the community. Census data confirmed these observations; the population has declined 5% since 2000 as younger families with means moved to surrounding counties.

New Haven had been a “big manufacturing town.” Most recently, Winchester (a gun manufacturer) closed a plant, resulting in a major job loss for the community. One informant noted that “what I’m seeing as a social worker in the community is people older and older still working.” In this faltering economic context, one informant said, “There’s studies that show that when the economy is at its worst and people are out of jobs, they come to the library.” There was also a note that New Haven served a large Spanish speaking older population; the 2007 Census listed almost a quarter of county residents as Hispanic. The senior centers are organized within communities characterized as ethnic enclaves (e.g., African American, Jewish, Italian).

NMRLS encompasses suburbs to the northeast of Boston. Most residents are white, well-educated, and relatively wealthy; many commute to Boston or to area colleges, universities, or hospitals to work. One informant related the importance of the way the area has maintained numerous small towns with distinct identities, “We live in a very historic area....There’s a vested interest in the history of this town and all the towns around here....There’s a community spirit here.” Because the cost of living is high, retirees particularly value free cultural programming.

Funding

The four Centers had different funding structures. Allegheny funding was taken from proceeds of a 1% local sales tax, but funding for Phoenix and New Haven came from the general municipal budget. NMRLS receives funding from the state of Massachusetts.

Motivations

The changing demographics of the community motivated Allegheny to make services to older adults a priority. The Allegheny County Librarians Advisory Council (a group of library directors which meets regularly to set priorities for the federated system) identified a need to focus on services to older adults to “help the community rethink what aging is all about and also to rethink the libraries’ role in that.” The system hired a former director of a senior center to champion the initiative.

For Phoenix, one informant noted, “before we even began our project...the Governor’s Advisory Group on Aging had issued a report on the demographic changes that we were going to be facing.”

From the beginning, development of expanded services to older adults has been tied to partnerships with Civic Ventures and Libraries for the Future. In 2001, Marc Freedman, founder of Civic Ventures, collaborated with Libraries for the Future and the Piper Trust on a national initiative originally known as Life Options but later renamed The Next Chapter. As part of this initiative, libraries were identified as centers for learning and civic engagement for older adults. The concept was spread nationally through conferences in several cities, including the home cities for four Centers of Excellence. Training included elements of the Lifelong Access framework, then a component of LFF’s Equal Access Libraries initiative. The first Life Options Institute was held in Maricopa County (home to Phoenix), Arizona, but that within months similar projects began in Connecticut (New Haven), Massachusetts (NMRLS), Pennsylvania (Allegheny County), and New Hampshire. The Lifelong Access Libraries component was launched as a separate initiative in 2004.

Phoenix was not the only Arizona library system to participate in the Life Options project. LFF opened a Phoenix office in 2000 and collaborated successfully with several area library systems. In 2001, the Arizona State Librarian collaborated with LFF to create a new five-year plan, “Arizona’s Libraries in the 21st Century: Building Communities, Connections and a Continuum of Learning.” Life Options was one outgrowth of that five-year plan. Phoenix Library Director Toni Garvey co-chaired the Maricopa County Commission on Productive Aging, sponsored by Civic Ventures, Libraries for the Future, and the Piper Charitable Trust. In 2003 the group issued a Life Options Blueprint so that others might replicate their successful model. Contributors to the blueprint included Diantha Schull from LFF and Judy Goggin from Civic Ventures. The Arizona State Library in partnership with Libraries for the Future implemented the Lifelong Access component of Equal Access Libraries from 2003 to 2006, and four communities near Phoenix (Chandler, Mesa, Scottsdale, and Tempe) were able to plan and implement Next Chapter projects with funding from the Piper Trust from 2003-2007.

The 2001 Coming of Age Leadership Forum in Boston was sponsored by Civic Ventures and the Massachusetts Coming of Age Coalition. By 2002, a coalition of 19 organizations, including the Massachusetts Board of Library Commissioners, agreed to implement strategies for program development and delivery to active older adults. In June 2002, a Futures Institute sponsored by the Massachusetts Board was held. In an interview, Mary Behrle from NMRLS recalled meeting Diantha Schull from LFF and Carol Greenfield, founder of Discovering What’s Next, ReVitalizaing Retirement, an outgrowth of Civic Ventures efforts. Behrle mentioned that soon

after this meeting she applied for the first NMRLS state grant to transform services to older adults. Also in 2001, Judy Goggin, who had previously worked with Elderhostel on its Lifelong Learning Institutes, joined Civic Ventures to become its champion on the East Coast. Goggin, an Americans for Libraries Council board member, began the “What’s Next Hub” at the Newton Free Library as a volunteer. The State Board and LFF continued to work closely together over the years on Equal Access Libraries and later Lifelong Access Libraries initiatives. In a unique partnership, one staff member was jointly funded by the Massachusetts Board and by LFF.

In Connecticut, the State Library collaborated with LFF to launch four pilot projects for the Life Options project, two of which were in libraries (New Haven and Hartford.) New Haven City Librarian James Welbourne explained that after some library staff were forced into early retirement in a budget crisis, some of those staff became volunteers. “Community Conversations” in conjunction with the Greater New Haven Volunteer Center for the Life Options Library initiative eventually led to the formation of the 50+ Transition Center. The Center’s part-time coordinator is Kate Cosgrove, who spends the rest of her time as Executive Director for the Greater New Haven Volunteer Center. In response to the success of Life Option programs, LFF, Civic Ventures, and the State Library hosted the “Coming of Age: Building Healthy Communities in Connecticut” forum in 2003. Soon after, the State Library’s Task Force on Library Service to Older Adults was formed. From that group, the Services for Older Adults Roundtable (SOAR) was formed, and it still maintains an active website with discussions and resources.

Allegheny County began its Older Adult Initiative in 2001 in response to demographic trends. It also formed an Older Adult Forum in 2003; the group continues to maintain a blog and to meet regularly. After LFF was awarded \$1 million by the Gates Foundation in 2003 to establish the EqualAccess Libraries network, LFF announced that Pennsylvania would be the first location to launch the program. Partnership opportunities were key; LFF cited the strong support of local funders for libraries as a major factor in its selection. The state as a whole had long been a leader in services to older adults; Commonwealth Libraries received the AARP’s inaugural Excellence Award for Public Library Services to Older Adults in 1993, an award the Allegheny association won in 2004. Since 2001, an Allegheny library has won the AARP award each year.

Volunteers

Support for volunteerism is a possible difference between the Center of Excellence communities. While Allegheny, New Haven, and NMRLS informants have witnessed interest in volunteering and “giving back” to the community by Baby Boomers after retirement, at Phoenix at least one informant said that most older adults were not interested in volunteering.

Partners

Key community partners for each library are identified in each library’s profile in Appendix B. Centers collaborated with a wide range of organizations, including governmental agencies, non-profit organizations dedicated to serving older adults, institutes of higher education, arts and cultural organizations, faith-based groups, and for-profit enterprises.

Comparisons: Library Context

Library Structure

The Centers of Excellence vary in organizational structure and governance.

Allegheny County Library Association (ACLA) is a federated system of 44 public libraries across Allegheny County. The system administration serves the independent member libraries, which retain the authority to run their own operations. For instance, individual libraries have different hiring and employment practices. One branch director at Allegheny noted, “There’s no real restrictions that anybody puts over top of us as library directors...who we hire...some libraries I know they, they only hire people with Master’s.” Allegheny libraries preserve the flexibility to serve the programming needs of their communities. The executive director explained that “we don’t mandate that they have to do it. We offer it out; we explain what it is.”

Conversely, Phoenix Public Library (PPL) is a hierarchical system composed of the Burton Barr Central Library and 15 branches scattered across the metropolitan area. Authority is vested in the Burton Barr Central Library, and the strategic plan mandates that branches focus on certain populations. While individual branches must meet minimal standards in programming (e.g., four 50 Plus programs a year), they are permitted some variation to serve their communities. As Toni Garvey described:

“There are measures with everything that’s in the strategic plan ...every branch then takes those goals and objectives and they determine what are the most important things for them in their community, because some of the goals are simply more important for some than the others. Some of them, no question, they have to do them, and then each branch and the Central library develop their own action steps every year.”

The New Haven Free Public Library (NHFPL) is a hierarchical system that operates from the Main Library and four branches in the city of New Haven. New Haven is governed by a board of directors appointed by the Mayor and the Mayor is an ex-officio member of the board.

The Northeast Massachusetts Regional Library System (NMRLS) is different from other Centers in that it includes not only public libraries, but also school, academic, and special libraries. Of 330 member libraries in NMRLS, 53 are public libraries. NMRLS coordinates shared resources and provides training for its member libraries. The Massachusetts Board of Library Commissioners oversees NMRLS and the other state regional library systems. Individual municipal libraries implement programming freely according to local needs. One respondent noted, “Everything is very much geared toward the community, and the communities might be just four thousand people and they might be a hundred thousand people, but they all have their own school systems for the most part, have their own libraries...and it’s very small at the local level.”

Management and Supervision Practices

Allegheny’s system-wide coordinator position for older adult services arranges quarterly meetings for adult services staff in which librarians share their experiences with developing

programming for older adults. The coordinator position supports librarians who are doing older adult programming but does not police which libraries are implementing or not implementing services.

Phoenix does not have a system coordinator for adult services like Allegheny does. It does have a system-wide coordinator for children's and teen's services. One librarian explained the centralized structure for youth services:

“our children’s and teens coordinator...does both jobs. She’s very strong. She gets it all done, and she started what she calls ‘clusters’ so there’s three or four branches in each cluster. There’s four clusters and there’s a cluster chair, and the cluster chairs meet monthly with the children’s and teen coordinator. There’s four for children’s and four for teens and they meet separately technically, and they’re the ones who book the programs for the summer...and then they disseminate information to us. We have other little mandates. They send us these kits and tell us how to use these kits. [They ask] ‘Do we circulate them? Do we have them free? Do we use them in program? What are they?’ So there’s a lot of things that children’s has in place—and teens now—has in place.”

The Phoenix children's and teen's staff have formal staff meetings. A children's librarian talks about the benefits of these meetings on staff relations.

“Now monthly, nine months out of the year, all of the children’s librarians—a representative from each branch—has a meeting. It’s a three hour meeting, at least. And we talk about collection development, programs, this that and the other thing. It is a very intense informational meeting. The adults don’t do that. So the children’s librarians, we’re very cohesive. We know each other. We’ve been meeting every month. You email so and so at whatever branch, you know who she is. You know her qualities. You know her strong points in children’s programming. The adult librarians, it’s rare that they get together, so they don’t know each other, they don’t email and say, ‘Listen, I’m having a program, I would like to have a program on such and such, do you have any contact people?’ They don’t know who to contact within the library system, because they never get together and meet.”

Although Phoenix does not have a system-wide coordinator for older adult services, library staff were optimistic about the prospects of a new position. As the focus on both children and teens services had grown, the need for a coordinator position for that age group became apparent and the position was eventually created. Several staff felt the 50 Plus program was a nascent initiative and in a few years would be as fully developed as children's services.

New Haven has children's and young adult services departments but does not have an adult services department as such. The 50+ Transition Center is coordinated by a part-time employee who also directs a local volunteer association.

While NMRLS does not have a designated coordinator to serve older adults, several interviewees in the area mentioned the effectiveness of the Assistant Regional Administrator, Mary Berhle, in championing services to older adults. One librarian noted,

“Mary has kept in touch with me. She’s kind of prodded me, which is a very good thing. I’ve appreciated that she’s certainly been very supportive any time I’ve had questions....This was Mary’s prodding again. I did go to an MLA conference...and I participated in a program with some of the other Lifelong Access Librarians who participate in the NMRLS grant, and we did a program on services to older adults. And you know I’m not sure I would have done it if I hadn’t had some prodding.”

Mary maintains a blog about services to older adults and serves as a point of contact for librarians who want to know about successful programming elsewhere in the region.

Institutional Culture

Use of strategic plan

Phoenix Public Library uses its strategic plan to define specific tasks. The plan mandates the minimum number of each type of programming an individual branch must offer to its patrons. By contrast, Allegheny County Library Association’s plan defines broad objectives but allows more flexibility for individual libraries to adjust to community needs. The NMRLS strategic plan directs centralized efforts to serve member libraries but does not mention services to any demographic group.

Programming priorities

Competing priorities are an issue in Phoenix. For the system, children and teen programming has long been a priority. This is evident by the detailed mandates in the strategic plan for children’s programming, the centralized children’s coordinator and the formal management structure for children/teen services. Although library management and staff expressed a growing need for older adult services, the interviewees expressed other priorities such as a growing Hispanic population (e.g., English as a Second Language) and children’s services (e.g., literacy) right now.

One librarian described the problem:

“I don’t think that the Boomer thing has not quite reached what I call critical mass in the library world. I think we’re waiting for that time to come as it came for the teens when enough people were doing it and enough people were catalyzing the change that it hit a kind of critical mass when everyone wanted to do it and be involved and that people could see it could be done. They could think about how it could be funded, and they could think about where they wanted to go. I just don’t think we’re at that critical mass in our system.”

New Haven similarly emphasizes services to children and young adults. The library web site contains links to pages for the Children’s Services and Young Adult Services departments, but

there is no mention of the 50+ Transition Center. Information for the 50+ Transition Center is housed elsewhere on the City of New Haven web site, and the brief web page has not been updated since 2005.

The Phoenix website was cited as an example of a situation of priorities competing for visibility. One librarian at Phoenix described the website presence of the 50 Plus initiative:

“If you go to our webpage, you’ll see these (what we call business cards) at the bottom, and they say Phoenix.gov and kids and teens and there’s one that’s the At Central Gallery, which is this hallway out here that has these photos in it. That business card was a 50 Plus card in the original design but we lost out in the politicking to the At Central Gallery. We lost our business card down there. So now we’re just a little tab on the top of the homepage...we just did a survey of the web page and I was very pleased because they asked about every section and I was very pleased to see people say that they could barely find business and 50 Plus”

One Phoenix librarian noted,

“99% of our programming is for children, just straight out children and then some, a little bit for teens too, but particularly during the summer it’s heavily programmed for kids. Sometimes that’s a problem because, like they were saying, when there’s so many kids in these small, small libraries that seniors don’t want to come in there. They have like one little area and the whole rest of it’s for kids and the computers. There’s the computers, there’s your AV collection, there’s your kids area, and then the adults get that corner.”

Whereas older adults seem to be a new target population for Phoenix, programming for this age group has long been a focus of Allegheny. For some time Allegheny has offered services for less mobile older adults, but it has also developed programs and services for active older adults and Baby Boomers. In interviews and focus groups, library management and staff expressed the importance of serving older adults, especially this new population of active older adults. One librarian noted that staff members were supportive of the LAL initiative “because the programs have been going on so long and because I think the staff recognizes that our library has always put an emphasis on serving older adults.”

Librarians described Allegheny as being “very supportive of all of the programming that we do.” Allegheny offers support for older adult programming through:

- a centralized LAL coordinator for adult programming
- financial resources for libraries wanting to do new programs
- a quarterly meeting for adult librarians.

For NMRLS, there is no designated coordinator for adult services, but the Assistant Regional Administrator provides training and support for all member librarians. The Assistant Regional Administrator maintains a blog dedicated to older adult services. Each member library is

independently operated, and some branches have a staff member who coordinates older adult services while others do not. Because many libraries are quite small with few staff, generally one person tends to become an informal point-person for older adults at each branch in addition to other responsibilities (e.g. Outreach, Business, Director). Where Adult Services does exist it includes collection development and reference responsibilities. Some communities have integrated older adult services in their long-range planning.

Some NMRLS interviewees have indicated competing priorities in their libraries. One librarian described how the creation of a young adult librarian “without meaning to, I think, took away some of the existing support for large type, to the point that the young adult area was moved into what was formerly the large type room.” Another library, however, had such successful adult programming that additional funding was granted to create a new large print and community room.

In times of particularly tight budgets, however, services to older adults are sometimes not seen as a necessity in the same way as services to children and teens or literacy programs are seen. When Phoenix faced a \$10 million budget cut, it reduced hours and cut back on storytimes, computer classes, and GED/ESL classes. Most other programming, including most adult programming, was eliminated entirely. Librarians pressed with tight budgets and low program attendance face issues outlined in Carnegie Library of Pittsburgh’s most recent strategic plan:

“One might argue that the library could offer a program on any topic in the name of lifelong learning; however, limited resources warrant a closer look at the types of programs the library offers, particularly with regard to adult programming. While customers have indicated a desire for more programs, their attendance at existing adult programs has been unpredictable. Whether better marketing of programs is needed or topical programs of wider interest could be offered, CLP needs to ensure that the time and resources used in sponsoring programs aligned with our priorities are generating the appropriate level of interest and audience support. All program offerings should be used as a vehicle for promoting the Library’s resources and value.”

For some libraries, facilities are older and maintenance needs compete with programming for funding. Competing priorities are not limited to the library itself, however. One NMRLS librarian asked about barriers to offering adult programming explained, “a little internally as a result of people having different priorities. I do have some support here. I think we, with a couple of other department heads, they realize that more attention needs to be paid to the older adults and I think the director does as well. But it’s probably, it probably happens everywhere, but also it’s a sign of, it’s part of the budgetary process right now. Not only are we competing for attention and money internally but other departments in the municipality are competing.” That year, city snow removal costs were particularly high and forced cutbacks.

Another NMRLS librarian mentioned another challenge to prioritizing older adults in a small library:

“It’s five thousand people, and I’ve found that it’s difficult to be successful when you really segment out groups here. It’s better to be integrated and broad and try to attract multiple groups at one time, just because of the size of the audience.”

Staff communication/relations

Communication between adult services staff differs among the Centers.

At Phoenix, adult services librarians within the system do not communicate with one another. Interviewees serving other age groups were unaware of the different types of programming within their branch. One children’s librarian only knew about programming for older adults because s/he drafted the programming calendar for the newspaper. Two Phoenix interviewees claimed it is unfair that adult librarians are not mandated in the strategic plan to develop a menu of specialized programs like children’s/teen’s services must do.

Allegheny offers an optional quarterly meeting for all adult services librarians. These meetings offer opportunities for staff to talk about their experiences with programming for older adults, brainstorm solutions to programming problems and share new ideas for older adult services. At Allegheny, there is more communication between staff within a library and between staff at different libraries as compared with Phoenix.

Given the small size of New Haven, librarians there knew other staff members within their library and at other libraries and were aware of the older adult programming.

NMRLS librarians who present adult and intergenerational programming meet quarterly in the Program Planners group. Librarians also indicated that they sometimes contacted the Assistant Regional Administrator to see if other area librarians were engaged in similar programming before planning a new offering.

In addition, members of five New England states, including Connecticut and Massachusetts, have attended three regional Lifelong Access Libraries Institutes, fostering additional networks for communication.

Relationship with Libraries for the Future (LFF)

At all three Centers, community collaborators were unaware of the Lifelong Access Libraries initiative or the sponsoring organization, Libraries for the Future. They did express an interest in learning more about the initiative. In contrast, library staff at the Centers were familiar with Libraries for the Future and the Lifelong Access Libraries and/or Equal Access Libraries initiatives. Staff frequently mentioned LFF’s initial training and grant funding as what began the older adults initiatives at their libraries, usually in conjunction with state library organizations. Only NMRLS interviewees mentioned an ongoing role of LFF, such as the newsletter, the website, and availability of consultation.

Comparisons: Adult Services

Services Overview

An overview of the services offered by each Center is given in the Library Profiles at the beginning of this section. Development and sustainability of these services were dependent on several factors:

- Services at the Centers of Excellence had generally developed over a period of time in response to community and library needs and priorities.
- Success was highly dependent on the existence of partnerships and the availability of both internal and external funds and support.
- Centers that were located in larger library systems were generally able to garner more partnerships and resources compared to individual libraries.

Variation in Programs and Services for Older Adults

Representatives from the four Centers for Excellence described a broad range of programs and services offered to older adults.

Book groups

Book groups were the most prevalent type of program for older adults. Among these groups, some interesting innovations were found. “We have a great partnership with Barnes and Noble in terms of helping to select the books and give us discounts on those,” one Allegheny respondent remarked. Booksellers have market data and can direct librarians to books appealing to this age group. The partnership with Barnes and Noble also helped groups to exchange books. “[T]hey have been able to level the resources by this rotation system, so that one month you know you’re reading this book and then it rotates to the next and the next and the next group.”

Allegheny deployed another creative book-group strategy by forming intergenerational reading groups, generally combining honors high school English students and seniors. One interview subject marveled that s/he had “been amazed at how...I thought that the kids would have very liberal views and the older people would be more rigid and more conservative, and I have found it is just the opposite.” The discussion yielded some surprising results which contradicted stereotypes of aging. The interviewee recalled “one book that had a lesbian undertone in it and kids would be like ‘no no, that’s not right,’ and the adults that I was at the table with said ‘hey, live and let live’ you know. Wow, I was really surprised. It was very interesting to see the two different age groups interact.”

Home delivery programs

The second most frequently mentioned service was delivery to homebound or disabled seniors. In New Haven, librarians delivered books to “shut-ins at some of the senior housing” for different faiths in the area. Allegheny partnered with area businesses to create a book club for persons confined to their homes. Books were delivered along with meals. The program incorporated a social component, allowing participants the chance to take part “in phone calls to discuss the book, and then they can also go to an event that is sponsored, and it kind of gets them out of the house. [For] transportation, we arrange all of that to get them there. So it’s kind of a social, intellectual type of thing that the three partners are doing jointly.”

Partnerships with senior centers

Libraries partnered with area senior centers to facilitate programming they could not otherwise have offered. One branch of the Phoenix Public Library “developed a monthly program where one of our staff members—and it rotated, it was someone different every month—went to the senior center and did a presentation.” One staff informant noted, “The presentation was anywhere from 20 minutes to 40 minutes, and then [were] the questions and answers and conversation and discussions.... The first one was just chocolate, history of chocolate.” Other programs in this partnership included a “conversation discussion group on household pets and what they mean to us, how they benefit us” as well as “one on the music of the 40s, 50s and 60s.”

Exercise and nutrition programming

One particular focus for Allegheny was exercise and nutrition. Libraries featured visiting instructors who came in to demonstrate Tai-Chi. They also had “a table set up for different organizations that serve that age group to come in and just give their information, and a nutritionist coming to demonstrate cooking for one or two, healthy cooking for one or two.” They moreover pioneered a Silver Sneakers program that gave seniors free gym memberships. Finally, one branch began a laughter club. “We do a little breathing, a little stretching to warm our bodies up and then we do a series of these laughter exercises which are taking this, the verbal sounds of laughter.”

Librarians at NMRLS mentioned an intergenerational health series. “The active Peabody is a new grant that we were awarded last summer from Libraries for the Future, and it is an opportunity to provide programming that supports healthy living, brain health, body health, but it is for all ages. It’s not specific to the older active adults. There are programs in that series that will certainly match the interests of older active adults but it is not geared specifically to that.”

Computer literacy

Instruction in computer literacy was popular. Phoenix found it unusually important to establish Spanish computer classes given the makeup of its community. In Allegheny, computer literacy also took precedence. “[B]ecause some of our one of our big issues which we’re trying to address is willingness to use [a] computer, computer literacy,” one respondent states, “and we fortunately have an organization called Senior Net. They have done a lot of different types of programs that are in the library.”

One NMRLS librarian mentioned positive reactions to Net Guides, teen volunteers:

“These kids that are our Net Guides are wonderful...with the older people. They have just incredible patience...they come into it with a wonderful attitude. They’re well trained....The kids are amazing, and we ask kids as well as the person who is using the Net Guide to evaluate, so the student is evaluating their experience as a teacher and our patron is evaluating the experience that they had. They’re always so positive, and the older people and family say this student was so patient and so great, explained things so well and they often will...take another topic and another...and ask again and again to have a net guide train them on something because it is such a positive experience.”

Other programming

Other older adult programs and services included “conversation salons” and discussion groups focusing on senior issues; speakers on senior issues; movie groups; day trips to historic sites; seniors-mentoring-teens programs; “Life Links” programs for caregivers to older adults; and food classes.

Program Goals and Intended Outcomes

Programs and services aimed at older adults across the Centers of Excellence were developed with a handful of common goals, as articulated by key informants at the libraries. The following goal descriptions illustrate the breadth of common program goals and intended outcomes in the three settings.

Health-related goals

One area of particular concern for library program planners was health. Programs that disseminated health and nutrition information to older adults and programs that engaged older adults in exercise were developed to meet this set of related goals.

Meeting the needs of new segment of active older adults (largely Boomers)

There was a perception, voiced by a couple respondents, that the new wave of more active seniors ought to bring about a corresponding change in older adult programming. “Libraries tended to be serving the slow-goes or no-goes ” one Alleghany County librarian commented. Libraries would either partner with outreach services or older adult living and healthcare facilities. This model, however, no longer seems as viable with Baby Boomers now becoming seniors.

“[I]n the Boomer generation, older adults are goes and they’re on the go. They’re constantly involved in things. They have no intention of going to the senior center and playing Bingo. I mean that’s just too appalling to them.”

And it is not just the Boomers. “Even my mother who’s 90 thinks that’s appalling. There is a complete change in attitude. One of our libraries in particular, the Northland Public Library, has through their foundation...started to look at service to that demographic.”

Alzheimer’s Disease prevention and brain health

Another stated goal of elder programming at Centers for Excellence was Alzheimer’s education and prevention. This goal lined up with increasing patron concern over the issue. Branches of the Phoenix Public Library reported programming in which older adult patrons could ask panels of doctors about the disease. They would ask ““I am starting to forget where my car is parked. Should I be concerned about that?” And the panel of doctors would talk about the research into some of the drugs that might be able to help, the prescription drugs, with the Alzheimer’s, particularly Alzheimer’s disease.” This program proved especially well-tailored to the needs of seniors. ““Staying Sharp’ is probably one of the most exciting programs that we thought we could work here in Phoenix area and bring one of the seminars possibly through the libraries.”

Demonstrating usefulness of library to community

Although more an indirect than a direct outcome of programming, libraries also hoped to use programming for all age groups to demonstrate continued relevance for the community. “I don’t

know if it's included but for my community, I feel like any time we can make any population feel special to the library it benefits our community and it benefits the library because we're, we're a tax payer supported institution," said one Phoenix librarian. S/he noted that it is always necessary to keep reminding one's tax-paying public of your continued relevance. "We're not our own taxing authority or anything like that, the library. But certainly, we need taxpaying support."

Serving as community center

Several mentioned the library as a community gathering place, a place to cultivate civic engagement. As one NMRLS librarian put it, "bringing the community together...for me that's exciting to see people talking to each other not just about the books but about the town and that whole theory of commonality, library as a community commons."

One Allegheny librarian noted,

"We're really interested in looking at the role of libraries in engaging that group of people and volunteer connections. In this community there are ways that people can find a second career and volunteer activities, but there's no real focal point for where they go to find that...I think that that's one of the emphasis of going forward is figuring out how libraries can fill that need."

Improving information literacy

While libraries will always serve older adults by providing information, another goal was to teach patrons how to access some needed information themselves. "It's very important to show them all the things that we, that they have access to, not just picking up a brochure and saying this is what you can get. It's showing them how to get it," one Phoenix librarian said. "I still think we're not necessarily targeting a particular over...certain age audience. I don't. I think all of us still have trouble thinking in terms of our audiences by their ages. I think our population has become much more slippery."

Part 2: Lessons Learned

Facilitators

Interviewees pointed to a range of factors that contributed to the success of programs.

Community needs assessment

In Phoenix, asking patrons about their programming interests contributed to success. “One of the things we learned at the Equal Access Institute was, you have to ask the people in your community what they want. You don’t tell them what they want and give it to them. You have to ask them,” one respondent explained. To this end, the library “create[d] and... facilitate[d] at least five focus groups throughout the city of Phoenix, to meet with people in this population of adults over 50, to find out how they’re doing, what they want, how we might meet some needs for them.” Much of what the library found was useful for marketing their programs. They learned, for instance, that “‘senior citizen’ is not a popular term.” Not only that, but the library also discovered that “there was no term” that did not rub at least some group of older adults the wrong way. Unfortunately, while focus groups made clear some of the things seniors did not like, they were decidedly less successful in pinpointing universally acknowledged needs.

Funders responded positively to needs backed by objective evidence. One NMRLS librarian demonstrated through usage statistics the demand for large print books. She received a “substantial increase” for those books and a larger area to house them. Another mentioned doing “a little training for our trustees early on about the demographics of what’s happening with the older adult population and they were on board from the beginning as being very supportive of this.”

Effective partnerships

Partnerships can help bring expertise to programming that librarians do not necessarily possess. They can also give programming credibility. In Allegheny, for example, partnering with a well-known insurance provider attracted volunteers to the libraries. “[Y]ou’re probably not familiar with Highmark, but Highmark is a huge name in this region, and it’s really kind of strange, people love to have the Highmark name associated with, you know what I mean? So that’s an advantage, huge advantage I have with this volunteer program.”

In New Haven, proximity to Yale translated into better program content. “Yale can provide intellectual content for a lot of programs,” one interviewee asserted. This, in turn, allowed the library to reach “a broader audience which they are often looking for.... Yale has an outreach mission for many of their grant programs in particular so that’s a nice way for us to partner with them. But also in the summer time we have a lot of summer programs going on.”

In addition to community partnerships, the Centers cited how they partnered with the national organization, Libraries for the Future. LFF provided training largely through the three Leadership Institutes and assisted in the pursuit of funding.

Active ‘Friends of the Library’ group

An especially active Friends of the Library group in Phoenix helped increase the library’s visibility in the community and aided their efforts to secure funding. “[W]e’re very lucky to have

this Friends organization... and they are extremely active group that makes things happen for this library,” one librarian said.

“They’re advocates. They’re out there at budget time at every budget hearing in this city talking to people. I mean: the elected officials know who the friends of the Phoenix public library are. They’re absolutely a force to be reckoned with. Absolutely, when we have a bond referendum that’s out there, the Friends are—they’ll be standing in front of libraries talking to people about voting for a bond referendum and what that means and that sort of thing, so they are tremendously engaged.”

Clear strategy

One Allegheny librarian noted the importance of a clear direction,

“Once you define the issue and strategy you’re half way there in terms of getting funding anyway. We will ultimately at some point be asking somebody for some financial support for those initiatives. But I think that you have to have a clear vision of what it is you want to accomplish and you have to have a lot of those partnerships lined up and ready to go before you can [say]...now we need money specifically for this.”

Staff training and buy-in

One NMRLS interviewee mentioned the importance of staff enthusiasm in achieving success.

“Just the energy of the folks who are involved. They had that original training and they went back to their libraries, they were able to make it happen. One of the libraries, not long after I think our second Institute, they went back to their library and they found out in the newspaper that the Y, the YMCA has this active older adults day that they didn’t even know about. It was the next week, so they contacted the Y...the library just put out a table. They couldn’t even I think staff it that first year. They put out a table and they put out information about the library and the next year they held it at the library instead of at the Y.”

Several others mentioned the role of training in jumpstarting enthusiasm and sharing success. Another NMRLS interviewee noted “I went to a workshop out in western Massachusetts that was on Lifelong Access and Diantha Schull was one of the speakers. That was what first put this idea in my head. I thought wow, she is fantastic. This is great...We have to be ready for these people. Diantha, she’s my goddess, you know?” A Phoenix librarian wished for more training.

“What comes to my mind is empowerment....When you have good ideas and you know what you’d like to see happen, how to make that happen, how to work within the system you have, to really give that over the top instead of just thinking gosh, this would be a good idea but I don’t think there’s any way to get that done.”

Single point of contact for outside groups

One community collaborator noted the importance of having one person to contact rather than a different person for each program. She offered,

Community collaborator: Other organizations with my same population, I would say that what has really, really helped is having one go to person. When the library assigned a person to be the liaison for us, I think that really made the difference. If we had to keep trying to find a different person to help us with different things, it would constantly be reinventing and re-asking, but they found one person who's motivated to work with the seniors and, and that's really made all the difference.

Interviewer: Yeah, so you and [librarian] can just sort of create this relationship and then develop these programs.

Community collaborator: Right and my whole staff goes to her, so it just cuts down on, it just increases the communication.

Facilitators identified by the Research Team

In addition to above factors directly cited as facilitators by interviewees, the Research Team also identified the following contributors to success using the interview and focus group data:

- Ongoing support from senior administration
- Sufficient internal resources
- Dedicated coordinator for adults services or LAL program who is part of senior management team

Barriers

In the course of our interviews, several barriers to effective services for older adults emerged.

Lack of resources

Staff

Lack of funding to support staff time for programming was the most frequently-cited barrier. As a result, a lack of adequate paid staff to fulfill programming goals was a more or less universal complaint.

As one NMRLS librarian explained,

“Everyone on staff is totally committed to whatever their jobs are right now and there's just no extra time to expand services to this population. Now if we ever had a budget increase, increase my hours, or we can hire another staff person to maybe take on some other duties, then we would...I mean I have a lot of ideas for what I, but just no time at this point and no money, no funding.”

Note the similarity in the following response by an Allegheny librarian. With “everything else that is happening, having adequate staff to really spend the time that we need to do these programs” is crucial.

“I think we could very much enhance [programming] if we had even a part-time person that was dedicated to just these types of programs, and that’s actually what we’ve talked about with the Life Links Program as we expand that program and [partner with] more corporations, it would be great to have a part-time person dedicated to the expansion of that program, because I think it’s been received as a very informative and essential program. And I think, by taking it and expanding it, it could have a very big impact for caregivers and potential caregivers in the corporate arena.”

Space

Said one Allegheny interviewee: “I don’t have lots of space so we have one program area. We have to watch how we schedule it, and then one of our criteria is you can’t be there and make money...we had a woman that wanted to come in to do on Pilates, and we let her do for 8 weeks.” Inevitably, though, space restrictions became a barrier. The Pilates instructor “was charging them \$75 for the 8 weeks and never gave us even a donation, so I said no it doesn’t fit with our policy, and we don’t want to be charging rent. My understanding always is that the library programs or activities take precedence. We are gonna be first...our policy is a group can use the program room twice a year.” Despite the instructor’s unwillingness to reciprocate by donating to the library, the respondent regretted having to turn her away. “If we have more space I think we would, I would like to. Because you get people in the facility then they are likely to use other services.”

Volunteers

Volunteers helped offset the lack of staff, but even they presented problems. Lack of training can limit their contributions to any kind of programming. One Allegheny librarian explained, “Two volunteers are older women. They have been in the library for a long long time; they just come in. One waters plants. Actually there’s three. One waters plants and two will come in and help us shelve. They don’t want to work with the computer, and I really don’t want them to...Somebody that’s just in there two hours a week, there’s too much to know, and too many exceptions to put them behind the desk. But you know, they repair books, recover books, or things like that.” Volunteers’ limited skills mean they can also be of limited use.

Sometimes the problem is that potential volunteers are “too skilled.” One NMRLS librarian spoke of two gentleman who’d been laid off and became volunteers.

“They’re used to very high powered positions and you know they’re helping us with shelving but they are, one of them just the other day said ‘I need more.’ So we’re all, I’m always trying to come up with projects where we can really use the skill level that they can provide. We have an idea parking lot outside of my office that staff and others are welcome to put things on, so at times, that’s become the wish list. You have to have some things in your back pocket to give people to do when they walk in your door. But it

takes time. It takes time to sit down with them and do that, and I've found that I've actually started using some volunteers for doing pricing for me or competitive research of vendors for me...takes me more time to sit down with them. People keep knocking on my door so I'm giving volunteers more of my work."

In one focus group, librarians mentioned that some directors might not want to "take a staff job and give it to a volunteer." In that same focus group, however, one Allegheny librarian relayed a story of another librarian allowing a volunteer to take on a more important role.

"She talked about her process of basically moving from the typical volunteer jobs to finally offering to this woman something that she was really wanting to do herself and [that] she thought was really interesting and related to her job. And finally offering this to this person, and what the person did with it, and where they took it, and the creativity that they brought to it, she said it was like a transformation. It was overwhelming what they were able to do. And she said, sure was it hard to give that up, because it was her own personal choice. She was obviously coveting that role for herself, but she said they took it in ways and places that she never would've."

Once the barrier of managing volunteers is overcome, they can be enormously helpful and take on projects of their own. Many librarians spoke of programming that was entirely volunteer-run. One librarian even mentioned how important volunteer-run programming was in the sustainability of these offerings. In Phoenix, volunteers not only save the library money but actually make money. "The executive Director has an office here, and [the volunteers] run the store we have downstairs. So they have space here for product for the store, and the store manager has an office here, and then they, the volunteers use the warehouse for their sales because we don't use the warehouse very much and it has shelving in it, so they sort books and put them on shelves for sales there." Volunteers made the library money through the book sales they primarily ran. "[T]hey're so good [that] they're getting involved in internet sales of books; they're selling used books on the internet."

Stereotypes of libraries

Some library staff and users cited outmoded perception of libraries as an obstacle to procuring funding. One librarian shared:

"I'm at a council meeting and...had gone and asked for an increase in appropriation from the municipality, and a gentleman stood up during the public comments section of the meeting and said what do we need a library for, I don't read....And I said 'Sir you should be embarrassed to admit that and the library...you obviously haven't been there for a long time cause it's so much more than going there to read.'"

Upon reflection, the interviewee saw the problem in other terms.

“And then I thought that was not his fault; that was our fault. We need to know how to promote it, so I think that is the barrier that we don’t. In library school, you are not really taught management, and you’re not really taught marketing. You are taught about the books, you are taught about children services, not so much even adult services, so I think there is definitely a opportunity and [a] necessary one considering that the Boomers are all starting to have more free time...we have to learn how to reach them, find them, and have staff for them, get our boards to understand that the libraries are more than just the books.”

But s/he admitted that changing perceptions of libraries among certain communities of older adults would be no easy task. “It’s harder in some of these older communities. They have a fixed idea of what the library is.”

Staff training

An Allegheny librarian expanded on a theme: the need for better training/education in elder programming. “I think librarians definitely will need some training. The advantage librarians have is that they are in the information business and we are talking about information. We’re talking about informing people about opportunities and connecting them with those opportunities.” Lacking specific expertise in older adult issues, s/he felt, hindered their efforts. S/he explained the benefit of “bringing some expertise to the table so that we can do workshops for librarians, and we’ve done that pretty consistently.” S/he elaborated, “The workshops that we had out in the Northland Public Library were specifically to get people’s brains wrapped around what’s going on in the whole field of aging and how that applies in the library world. So we would definitely want to look for opportunities, maybe on a national scale, that we could send some of our people to, like the [LAL] Institute that Charity went to and other individual counties. So that helps to sort of jump start that interest within our profession here and look at ways that we can bring in expertise and do workshops for the library staff.” Bringing in experts and forging partnerships have become increasingly important as libraries enter into a more competitive market for seniors’ attention.

“Because it is a different sense [than] librarians traditionally have served older adults...where you just assume[d] they don’t have or can’t have much going on, and so you’re bringing it all to them. Whereas this is a different model altogether. They have a lot of things going on, and we’re going to be competing for their time and interest in the same way we compete for families’ time and interest, so we need to understand better what that service model is all about. That’s a change.”

Marketing and promotion

In both the library staff and user focus groups, participants noted the challenge of marketing the library’s programs and services. Key informants noted that older adults often are not aware of the services and programs the library provides. One library user at Phoenix mentioned, “unless you read the back page [of the newspaper] next to the want ads, you won’t find any reference to it [programs offered at the library]. You want people my age down here and you have to come up with some way of telling [us] what is here.” Further, library staff noted using newspapers, local

access cable, flyers, mailing lists, and email listservs as a means to promote programs and services but were unsure of the best way to reach the older adult population. Additional staff training in marketing is needed.

Resistance to the senior label

A further difficulty derives from Baby Boomers' perceived unwillingness to conform to the traditional senior mold. Boomers demand more active programming, and this has to inform how libraries formulate and market their services. One librarian recounted the success her library enjoyed with younger cohorts of older adults: Senior programming, s/he said, is "really tricky. It's interesting with our program: we've really steered to a younger range so most of the people in our program are like age 70 and younger. I don't know exactly how we got the younger audience unless it's because we're such a new program and people are newly retired and looking for something to do." The respondent acknowledged that it was not always easy to promote programming to Boomers.

"[I]t's sometimes hard to hit that right, like you said, wording or the right image to let people know that...there would be something valuable here for adults in the Baby Boomer age. That's the young retirees or people who aren't quite ready to retire yet but maybe have their children gone."

Librarians in New Haven experienced this same frustration. A more active senior community, one librarian admitted, "makes programming much more of a challenge because you know that you're not doing the typical things like providing books to shut-ins or providing social security classes, instruction." Instead, the librarians found themselves "talking to people who are re-careering, which means that they have a whole other section of their active lifestyle ahead of them....programming to this age group is very complicated."

Impact of the internet

Part of the more competitive market for senior services is, of course, the internet. A New Haven focus group participant acknowledged not knowing quite how conventional libraries should compete with or complement this new font of information. With how "people can get as much information as they can off the internet," s/he was not sure "how that might impact the number of people that come to the library. I mean it's just like any business that doesn't get with the times. I don't know how the library competes with that. I'd be curious to know myself because it's obviously much easier to sit home and do your research right there on a computer right now. I mean, I'm not [a] wizard technology wise that some people are but I get by and I can't imagine future generations with the skill levels that the youngsters are getting today, how that might have an impact on the future of the libraries."

Diversity of interests and needs

Yet another hindrance to useful programming was the diversity among seniors. Of the older adult community in Phoenix, one librarian complained "It's huge! It's, are we talking about 50 plus? Well hell, that's most of my staff!....How do you begin to say, I want to come up with a plan of service for people 50 and older?" Other age groups are so much easier to program for, s/he continued. "[Y]ou can do it with 0-5, great, 0-5 I can zero in on that, I can do it with teens. We put a lot of energy into teen services but older adults..."

Institutional resistance

Efforts to incorporate new and more diverse programming have been complicated by institutional inertia. In Phoenix, one interviewee groused that getting new ideas heard by the people who make decisions, especially for someone new in the profession, could be frustrating. In library school “they always teach you like you’re going to be the director and then you end up in a system where you’re a small wheel and you learn, hopefully over time, that no one wants to necessarily hear every wonderful idea you have, and maybe they’re not going to like them, and maybe not everything you want to do is going to happen. Maybe it will but it just takes a while, and then you have to build credibility and work your way up.”

Institutional resistance was particularly strong after grant funding ran out. Services for older adults were envisioned as special initiatives funded by grants but were sometimes not supported with staffing and funding after the grant expired. At least one library had no programming budget; programs were entirely funded by grants, individual donations, and the Friends group. One Phoenix librarian noted, “I regard us in some ways as in a limbo state, that we’re emerging from, post grant...very few of our recommendations were acted on... We asked for an adult services coordinator – that didn’t happen. We asked for a volunteer coordinator – that didn’t happen. I wanted to ask for spaces but I got voted down, so that didn’t happen.” One NMRLS interviewee admitted, “when we had the grant...we were more involved, but now I just check the website once in a while...now with the Center for Excellence money...I’ve gotten involved again because we, it really wasn’t a lot going on.”

Sometimes programs have such impact on patrons that private support can overcome institutional barriers. Two NMRLS interviewees referred to the following story of music programming begun during the Equal Access grant.

“They had some money for programming and for services and for collections and so they did a big push one year for that, and they had all kinds of programming for older, active older adults. And when the money, when the grant money ran out they couldn’t do it anymore and one woman was so delighted that she had met people...It had gotten her out of her house and she’d met people that she hadn’t known and she was just so delighted with the social aspect of it. She said if I give you some money would you continue this each year? And they had to swear it would be anonymous. A thousand dollars a year and plus now they have gotten some money with other women in the community, so they were just delighted to have this continue.”

Transportation/time of day

Some older adults do not have access to transportation to attend programming, and others may have access but prefer not to get out at certain times. One New Haven librarian mentioned that seniors there did not like to attend evening programming but would come on Saturdays because the bus ran then. Parking was mentioned as an issue by patrons and librarians in several areas, and some mentioned that seniors might find driving in the center of town unnerving. One NMRLS librarian mentioned that transportation is so critical to program attendance that she’s put it into the strategic plan.

One Phoenix librarian shared,

“We actually have split, I think daytime and evening, and I know we’re missing out on some people at both times that we could have in that population. So that’s to me continues to be something. What’s the answer? Is the answer offering it twice? I don’t know. Offering the same program twice for those people that can, that don’t go out at night, for whatever reason whether they don’t feel safe, whether its security issues, or driving issues, transportation issues, whatever it is. Or what about those people that are still workin? But fall very smack within our age range but are still working or have busy day schedules?”

As one NMRLS librarian mentioned, “the people who are able to join us in the evenings are just...it’s a very different profile to the person who, compared to who comes during the day. We, being in New England...related to the timing, we have the barrier of the cold, dark winter nights...Once you get closer to that daylight savings time, it’s like a magic thing for us here. You know you gain that little extra hour of sunlight over the course of a few weeks and all of a sudden the crowds during the evenings are much, much more robust.” Warmth isn’t always ideal, though. Another mentioned the difficulty of drawing a crowd on “a nice spring day.”

Several libraries mentioned collaborations with senior centers or agencies on aging to overcome transportation barriers for older adults.

Inconsistent attendance

Some librarians were frustrated that they couldn’t find a space large enough to house their programs. Others, however, struggle with attendance for older adult programming. One Phoenix librarian noted that even when programming priorities were developed based on community input, sometimes “in our focus groups we get a lot of input about what people want, but we haven’t seen people really be willing to come out and do the activities that they’ve said that they want.” One librarian noted, “when I was at [library] they clamored for an identity theft program, which was put on for them and not one person attended.”

Phoenix found one way to overcome this barrier for one program. “What we found is, though we loved the program, attendance was not, was underwhelming, you know, 5 people, 20 people, and it’s really tough when you bring in a professional. But, since we taped them, the City of Phoenix has a city channel and they’ve been playing on there and we’ve gotten huge comment on how many people watch them, and, I don’t know if the cities you come from have city channels, but stuff usually repeats...we’ve had a huge added value because we’ve brought them into audiences who may not come to the library.”

Stability of collaboration

One NMRLS librarian revealed that some collaborations are based on personal rather than institutional commitment. When people move on, partnerships can be lost. “The person at the Y changed over and that kind of fell by the wayside because the person at the Y was not, [there] was nobody [to] contact for the library any more.” In another instance, “We were sort of in contact for a while with the Council on Aging in [town] and a person there, a staff person there

was on our advisory committee when we were planning the grant, but then she changed jobs and I didn't have any other contacts there." In Phoenix, one community collaborator lost some donated space that the library had been using for programming, and they were scrambling to find a new space.

Part 3: Recommendations

Promising Practices in Developing Programs and Services

While there were many contributing factors to the success of programming three strategies stand out as particularly promising.

Understand the community context: Get demographic information and input from older adults

The needs of older adults are diverse. Understanding the diversity that exists in the service area enables the library to tailor their programs and services to the older adults in their community. Allegheny reported great success in drawing listeners to their author readings. “We have got all the book clubs, and now that we’re getting so big my challenge is [that] I’m gonna have to have more than one.... We have an author to come and speak about her book and about her life. We provide them a light lunch for free.... And it’s just so fun. We usually get about eighty to a hundred of our book club members there,” one librarian offered. “Even though (you don’t know Pittsburgh!) downtown is very difficult. People hate to come downtown and our auditorium is downtown.”

One community partner from Northern Massachusetts Regional Library System explained how presenting quality programming can make the initiative self-sustaining, as program attendees become volunteers. “They may come to an event and then all of a sudden we find out, oh, well this person has an interest in music...and all of a sudden we have somebody who can really give some benefit to the community. This woman lives in another town, and she saw and has come to a lot of our culture series...she said, you know, I do ballet series...and she’s doing the next series for us in April....Some of these professors...we find out that they also have another interest...the historian, we found out that he is also interested in jazz so we ended up with a jazz program.”

Several libraries have realized gains in the involvement of older adults by gathering information, asking patrons to tell them what they want. One librarian from the Massachusetts explained,

“We went into it with this idea, this is the perfect thing for the library to do, but then we started doing our focus groups and our surveys and that came out at the bottom of the list every time we asked. It was just, it was so funny. It was the classic case of not making the assumption, because we made an assumption that was so wrong....You know if we had just gone on what we, our gut feeling, we would have been totally off base. So you know I always tell people that, you know, do your homework...Do what you’re supposed to do to find out what the community wants because then it’s gonna be a success, because that’s what they want.”

She continued, “We had such a great response from the community, and people were saying to us, gee, we hope this isn’t gonna go away.”

Another Massachusetts librarian noted the success of crafting programs developed based on patron feedback. “We’d keep adding more and more sessions to, in order to make sure that

everybody on the waiting list was able to at least get registered into a particular session....It really surprised me how well people responded to those kinds of programs.”

One key informant in Allegheny County noted, “I would say for the most part, the comments that we’ve received back indicate that this is something they look forward to every month in their life as a focal point.” For library clients, the programming was often more than just showing up for a lecture. Older adult patrons thought of programming as “something that [the library] planned for [them]...it’s an activity that engages them not just at that event but in reading that book in advance they know that they’re already preparing questions for the group and thinking them through...what they’re gonna have to offer in terms of discussion. So it actually consumes more of their life than just showing up once a month at a particular event, and that little activity gives them purpose in terms of something to focus on and look forward to.”

Some interviews focused on the impact of the social component of library activities. After a program on life after divorce in a Massachusetts library, a group of women formed a support group.

“If we could have planned this out, we couldn’t have...planned anything better. It was just, that’s just exactly what people want. They wanted the chance to meet one another, to have it be meaningful, and this gives them the mechanism and the opportunity to do that.”

Ways libraries can implement this promising practice include:

- Providing support and training on the most effective ways to conduct needs assessment and program evaluations so that programming matches the priorities and interests of community members
- Sharing evidence-based practices on how to create and market successful programs
- Gathering feedback from patrons on what kinds of barriers (e.g. transportation, location, time offered, etc.) can prevent them from attending more programs and/or volunteering, and then work with partners to address those barriers

Advocacy organizations can assist in this process by:

- Offering training materials in a variety of formats so that staff who cannot travel to attend training can still benefit from expertise in best practices for needs assessment, program evaluation, marketing and promotion
- Supporting a Community of Practice so that librarians across the country can share ideas and be motivated by stories of success

Dedicate a system-wide coordinator to older adult programming

The position of Special Services Coordinator at Allegheny County serves as a support for librarians and ensures that services for this age group are maintained despite competing demands on time and attention. Informants at Phoenix noted the difficulty of not having supervisory responsibilities over the older adult staff: “if we decide to do something as a 50 plus group...we are not the supervisor of our 50 plus contacts, so you know we only have so much control over what we can ask them to do as well, and hope that they do it.” Key informants in both Allegheny County and Northeast Massachusetts mentioned the importance of consortia in coordinating their

Lifelong Access efforts. Consortia organized training meetings, communicated motivating stories of success, distributed grant funding, and helped individual libraries apply for outside funding. Follow-up helps ensure accountability.

A system-wide coordinator can improve the success of programming by:

- Generating healthy peer pressure to ensure follow-up on group objectives
- Providing a clearinghouse of resources (training, aging news, etc.)
- Applying for and allocating outside grant funding
- Serving as central point-person for community partners
- Engaging in local and/or virtual communities of practice that support innovative older adult programs and services

Advocacy organizations can support these coordinators by:

- Continuing to offer training related to aging and best practices in service provision
- Helping coordinators to seek funding and to craft effective grant applications
- Advocating for the transformation of older adult programs and services nationwide

Create partnerships with community organizations

Another promising strategy for successful programming in the Centers of Excellence was the development of partnerships with community organizations. “I think first of all we’re much more engaged with our community as a result of that,” said one Phoenix interviewee. “I think the programming that they put on ... has had a positive impact in a venue when they might not have been able to have a program before... and the programming that we have put on I feel has really impacted the community.” Every indication pointed toward the program’s success. “Our statistics are very good... the feedback on the evaluations is generally good and I feel like we definitely have reconnected with people we would not have connected with in a million years if it hadn’t been both for Equal Access and for the grant and this initiative, and I think the partners have benefited as well.”

One senior center administrator in Phoenix expanded on the reasons for their partnerships’ successes. In the beginning, s/he said “we approached the Senior Centers in Phoenix and we said would you be interested in playing captive audience so, for example, last week our nutritionist spoke to 65 people.” In addition to the “captive audience” aspect of senior centers, the partnerships also worked because the parties worked together toward useful programming within the library as well. “[W]e sponsored um, a seminar with them back in March on working with family members on memory and Alzheimer’s and Alzheimer’s and special needs, working with people with special needs, and we had our experts and it was done here at this library. Some of the topics, the special needs speakers had the least amount of people in her session, but the doctor who spoke on Alzheimer’s and memory had a packed house.”

Several key informants explained that when libraries and community organizations partner, they are able to accomplish more with limited resources. For example, a library might contribute a meeting room, while an agency on aging might provide transportation. One community partner explained, “I have an ongoing dialogue with the libraries.” She explained that the directors of the library and her agency meet every month. “We share a lot of programs. We don’t mind either,

you know, we borrow programs from one another.” She also mentioned sharing volunteers. She further suggested working with other towns in consortia.

“There’s a lot of sharing the books...a lot of sharing ideas, and I think you have to...be open to that too....The key thing is, you’ve got talent right in the area you live in, and try to tap into that talent...[have] a common goal on both sides.”

Inclusion of community partners can improve the success of programming by:

- Helping the libraries directly reach new older adult audiences
- Helping the libraries market to new older adult audiences
- Leveraging organizational funding to enable more programs and services
- Leveraging grant funding to enable more programs and services
- Increasing the visibility of the library in the community

Advocacy organizations can support the creation and maintenance of partnerships by:

- Promoting the concept of “libraries as partners” across the country
- Helping libraries identify community partners
- Identifying national leaders of potential community partners and encouraging collaboration with libraries

Appendix A: Detailed Methodology

Library User Focus Groups

Library user focus groups were conducted at three Centers of Excellence (Phoenix, Allegheny, and New Haven) between June and December 2007. The group size ranged from 4 to 10 users, with a total of 18 participants across all sessions. Each interview lasted approximately one hour.

The focus groups covered the following topics:

- the way participants use the library
- whether users have input in developing programs
- programs users liked most and least
- library involvement in the community
- ways for libraries to remain relevant
- ways to improve LAL initiatives
- topics developing during conversation.

Eighteen library users completed profiles. This group was comprised of 50% males and 50% females. Although all were White, 6.7% were of Spanish/Hispanic/Latino origins. The majority of users (72%) were retired and not working for pay. Only 17% of participants were currently employed, 6% were not working for pay and not seeking work, and 6% of participants were retired but working for pay. Ages ranged from 59 to 84 years old with a mean age of 69 years (standard deviation of 7.7). The number of years the users had been using the library ranged from 1 to 60 years with an average of 15.9 years (standard deviation 14.9).

The years of schooling of participants ranged from 12 to 21; the mean was 16.2 years of education (standard deviation 2.8). With a closer look however, the data show spikes as follows: 22% of the group had 12 years of education (high school), 17% had 16 years (bachelor's degree), and 39% had 18 years (master's degree).

Library Staff Focus Groups

From June to December 2007, three focus groups with library staff were conducted at their respective Centers of Excellence (Phoenix, Allegheny, and New Haven). The size of the groups ranged from 6 to 11 users with a total of 24 individuals. All interviews lasted approximately one hour. These sessions addressed topics such as staff roles, input to program development, successful programs at the library, programming offered for older adults, library connections to the community, what is needed to improve LAL programming, how to maintain libraries' relevance, and other topics that developed out of conversation.

Descriptive data were gathered on staff who participated in the focus groups; the majority of this group was female at 92%. In the group, 9% identified as Mexican, Mexican American or Chicano and 91% responded that they are not Spanish/Hispanic/Latino. 86% were White and 14% were Black/African American. One LAL Fellow participated in the focus groups.

The years of schooling of participants ranged from 12 years to 21; the mean was 16.8 (standard deviation 2.5). With a closer look however, the data shows spikes as follows: 13% of the group had 14 years of education (some college or associate's degree), 13% had 16 years (bachelor's degree), and 46% had 18 years or more (master's degree).

The age range of the staff group is from 19 to 78 years old with a mean age of 55 years (standard deviation of 10.9). The number of years library staff have been employed by the library ranges from less than a year to 41 years with an average of 12.16 (standard deviation 11.8). On average, staff work 34.7 hours per week (standard deviation 7.3) although hours ranged between 16 and 40 per week.

Library Staff Interviews

Library Staff Key Informant interviews were conducted for all four Centers of Excellence from June 2007 to February 2009. Some interviews were conducted in person and some by telephone. Eighteen staff were interviewed; all interviews lasted approximately one hour. Interviewees were identified by the library director or key contact at the Center and were given the option to participate. In selecting informants, we identified and recruited staff that have worked with LAL programs and/or have contact with users.

The library staff interviews focused on the LAL initiative and how it was incorporated within the Centers' libraries. Questions covered the following topics:

- how the person's library became involved with LAL
- programs and services offered for older adults
- how LAL programs are supported by the library (funding, policies, etc)
- staff training related to aging issues and services for the actively engaged older adult population
- resistance from internal or external sources concerning the implementation of LAL programs
- LAL program evaluation
- LAL programs that have extended beyond the library
- the future of LAL programs (changes and additions)
- the overall benefits of engaging in the LAL initiative
- other topics that developed during the course of interviews.

For the library staff demographic surveys, 83% of respondents were female and all identified themselves as White. None were of Spanish/Hispanic/Latino origins. Only 17% of the group cited a bachelor's as the highest degree. Over half (61%) of the group had a master's degree in information/library science, and 22% of the group had a master's degree in another discipline. Four participants were LAL Fellows (22%).¹

The age range of the group is from 28 to 78 years old with a mean age of 53 years (standard deviation of 14). The number of years the library staff have been employed at their respective libraries ranges from 1.9 to 29 years with an average number of years employed being 11 years

¹ At the time of the interviews, only three had attended the Institute, and one was planning to attend in 2007.

(standard deviation 7.7). The work week for the staff ranges from 20 to 46 hours with a mean of 36.9 hours (standard deviation 5.9).

Community Collaborator Interviews

Fourteen community collaborator interviews were conducted for the four Centers of Excellence from June 2007 to February 2009, some in person and some by telephone. Community collaborators were identified by management at the Centers of Excellence and informants were given the option to participate. Interviewees had worked on LAL programming with the Center.

The interviews centered on developing a better understanding of the organization itself and on the relationship between the organization and the library. The interview schedule covered topics such as:

- the organization's mission/goals
- current collaborations with the library
- knowledge of the overall LAL initiative
- needs of older adults in the community
- facilitators and barriers to LAL programs
- the future of LAL programming
- other topics developing during the interview.

The community collaborator profiles show that this group has the following identifying characteristics: the group was comprised of 86% females with 93% of the group identifying themselves as White, 7% as Black/African American, and none as Spanish/Hispanic/Latino. Half (54%) of the group had bachelor's degrees, 15% had a master's degree in information/library science, and 31% of the group had a master's degree in another discipline.

The age range of the group is from 34 to 70 years old with a mean age of 52 years (standard deviation of 11). The collaborators have been working in their respective positions from 2 to 17 years with an average of 7.7 years (standard deviation 4.7). The work week for the collaborators ranges from 8.5 to 60 hours per week with a mean work week of 38.4 hours (standard deviation 11.4).

Appendix B: Community Profiles

Phoenix

Community Description

Phoenix, incorporated in 1881, is located within Maricopa County and serves as state capital. The city is currently the fifth largest in the U.S. and has witnessed especially dramatic population growth in the last two decades. The city is home to a number of higher education institutions including Arizona State University, Grand Canyon University, University of Phoenix, Ottawa University, DeVry Institute, and the American Graduate School of International Management (Thunderbird.) (Phoenix, 2008)

Although the county also maintains a library system, any resident of Maricopa County may obtain borrowing privileges from the Phoenix library.

Population Information

Table 1 presents basic population data estimated in the 2007 American Community Survey from the Census Bureau for Phoenix. Phoenix residents are younger on average than those in other cities. According to a 2003 Brookings Institute Report:

Baby Boomers aged 35 to 54 are by far the nation's largest age cohort, but people in their late 20s and early 30s make up Phoenix's largest age groups. The recent wave of Mexican immigration to Phoenix has affected both age and household patterns: The city contains more young adult males than females, and has the highest proportion of married couples with children among the 23 Living Cities. In addition to attracting young people from abroad, Phoenix was a magnet for domestic migrants in the U.S. during the 1990s. Thirty percent of all residents lived in a different city five years ago, and the city gained a significant number of 25- to 34-year-olds even as their numbers declined nationwide.

GENDER AND AGE	Estimate	Percent
Total population	1,513,777	100%
Male	777,589	51.4%
Female	736,188	48.6%
Under 5 years	139,388	9.2%
5 to 9 years	119,092	7.9%
10 to 14 years	119,120	7.9%
15 to 19 years	108,726	7.2%
20 to 24 years	99,923	6.6%
25 to 34 years	254,134	16.8%
35 to 44 years	233,168	15.4%
45 to 54 years	196,581	13.0%
55 to 59 years	73,626	4.9%
60 to 64 years	52,524	3.5%
65 to 74 years	61,763	4.1%
75 to 84 years	39,863	2.6%
85 years and over	15,869	1.0%

Table 1 -- Population, American Community Survey 2007, Phoenix, AZ

RACE AND ETHNICITY	Estimate	Percent
Total population	1,513,777	100.0%
White	1,135,440	76.2%
Black or African American	80,207	5.4%
American Indian and Alaska Native	28,631	1.9%
Asian	40,217	2.7%
Native Hawaiian and Other Pacific Islander	2,041	0.1%
Some other race	203,358	13.6%
Two or more races	23,883	1.6%
Hispanic or Latino	646,670	42.7%

Table 2 -- Population by Race/Ethnicity, American Community Survey 2007, Phoenix, AZ

About the same number of residents identified themselves as white versus the national average. Interestingly, the next largest category was “some other race” at 13.6%; nationally 97% of the people who choose this category write in a race reflecting their Latino heritage. A significant portion of residents (42.7%) identified themselves as Hispanic, but people of Hispanic origin may be of any race and should not be combined with racial totals. A quarter of Phoenix residents (25.7%) were born outside the U.S., and the vast majority of these (78.7%) came from Latin America. Even many born in the U.S. continue to honor their heritage; 34.1% of city residents speak Spanish at home.

Fewer Phoenix residents have graduated from high school or attended college versus the rest of the country. Some residents entered the country as adults and did not receive 12 years of education in their countries of origin. Linguistic challenges can affect the children of immigrants even if they were born in the country, causing higher dropout rates. Native Americans have particularly high dropout rates as well. While Phoenix college-bound seniors consistently score above national averages on the SAT, education remains an important concern for the community.

EDUCATIONAL ATTAINMENT	Estimate	Percent
Population 25 years and over	927,528	100%
Less than 9th grade	111,920	12.1%
9th to 12th grade, no diploma	100,023	10.8%
High school graduate (includes equivalency)	244,085	26.3%
Some college, no degree	191,871	20.7%
Associate's degree	62,087	6.7%
Bachelor's degree	143,409	15.5%
Graduate or professional degree	74,133	8.0%

Table 3 -- Educational Attainment for Population 25+, American Community Survey 2007, Phoenix, AZ.

Workforce Information

Industries

“Service industries (including tourism and businesses services) and trade account for almost 77 percent of the labor force in the Phoenix area, and are projected to continue to be the largest source of employment growth for the next few years. Phoenix's state-of-the-art telecommunications infrastructure and direct-link satellite communications have made the city an appealing location for telecommunication operations. Investment firms, credit card companies, banks and customer service centers are among the many companies taking advantage of the metro area's talented, educated workforce. Some of the large processing and/or regional headquarters operations include USAA, American Express, Chase Bank, Bank of America, Discover Card Services and Wells Fargo Bank. The high technology and aerospace industries also have a strong presence in Phoenix. High-tech companies alone employ 56 percent of all

manufacturing jobs statewide. Honeywell is the region's largest private employer, with nearly 12,000 workers. Other similar-type employers include Intel, Avnet, Honeywell, Bull Worldwide Information Systems, AT&T, Sumitomo Sitix Corp., STMicroelectronics and Boeing Helicopter Company.” (Phoenix, 2008)

OCCUPATION	Estimate	Percent
Civilian employed population 16 years and over	715,630	100%
Management, professional, and related occupations	221,319	30.9%
Service occupations	133,534	18.7%
Sales and office occupations	178,044	24.9%
Farming, fishing, and forestry occupations	1,064	0.1%
Construction, extraction, maintenance and repair occupations	106,619	14.9%
Production, transportation, and material moving occupations	75,050	10.5%

Table 4 -- Employment by Occupation, American Community Survey 2007, Phoenix, AZ

INDUSTRY	Estimate	Percent
Civilian employed population 16 years and over	715,630	100%
Agriculture, forestry, fishing and hunting, and mining	1,909	0.3%
Construction	96,564	13.5%
Manufacturing	60,178	8.4%
Wholesale trade	23,049	3.2%
Retail trade	77,354	10.8%
Transportation and warehousing, and utilities	32,999	4.6%
Information	11,828	1.7%
Finance and insurance, and real estate and rental and leasing	67,527	9.4%
Professional, scientific, and management, and administrative and waste management services	96,044	13.4%
Educational services, and health care and social assistance	108,333	15.1%
Arts, entertainment, and recreation, and accommodation, and food services	71,806	10.0%
Other services, except public administration	38,912	5.4%
Public administration	29,127	4.1%

Table 5 -- Employment by Industry, American Community Survey 2007, Phoenix, AZ

Employment Figures

“Diverse components of the economic base help insulate Phoenix from the severe downturns experienced in many communities reliant on a narrower range of industries. In fact, Phoenix has experienced negative or zero employment growth in only four of the last 54 years.” (Phoenix, 2008) Unemployment is lower in Phoenix compared to the rest of the country, and fewer people are outside of the labor force.

EMPLOYMENT	Estimate	Percent
Population 16 years and over	1,111,077	100%
In labor force	756,238	68.1%
Civilian labor force	755,945	68.0%
Employed	715,630	64.4%
Unemployed	40,315	3.6%
Armed Forces	293	0.0%
Not in labor force	354,839	31.9%

Table 6 -- Employment Status, American Community Survey 2007, Phoenix, AZ

Income Information

The median household income in 2007 was \$48,061 somewhat lower than the national average of \$50,740.

In 2007, the percent of families living below the poverty level (14%) was above the national rate of 9.5%. Because family size is larger in Phoenix than nationwide (average 3.77 versus 3.20 nationally), low income families are more likely to live in poverty.

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City of Phoenix. (2008). Phoenix Overview. Retrieved October 10, 2008 from <http://phoenix.gov/BUSINESS/mrktover.html>.

INCOME	Estimate	Percent
Total households	493,292	100%
Less than \$10,000	35,658	7.2%
\$10,000 to \$14,999	26,182	5.3%
\$15,000 to \$24,999	57,272	11.6%
\$25,000 to \$34,999	57,417	11.6%
\$35,000 to \$49,999	78,705	16.0%
\$50,000 to \$74,999	91,181	18.5%
\$75,000 to \$99,999	58,728	11.9%
\$100,000 to \$149,999	53,260	10.8%
\$150,000 to \$199,999	16,670	3.4%
\$200,000 or more	18,219	3.7%
Median household income (dollars)	48,061	(X)
Mean household income (dollars)	65,697	(X)

Table 7 -- Income, American Community Survey 2007, Phoenix, AZ

Allegheny County

Community Description

Allegheny County was founded in 1788 in the southwestern part of Pennsylvania; it is composed of 130 municipalities. The county is a short flight or a day's drive from many of the world's busiest commercial centers, including New York, Philadelphia, Washington, D.C., Boston, Atlanta, Detroit, Chicago, and Toronto. (Allegheny County, 2008) "Pittsburgh, once referred to as "the smoky city" and "hell with the lid off" because of its sooty factories, is a modern success story. Air quality controls, stream purification laws, and the razing and redesign of congested areas since World War II have resulted in a city that surprises first-time visitors. Nestled among the forested hills of southwestern Pennsylvania at the point where the Allegheny and Monongahela Rivers form the Ohio River, the new Pittsburgh is a city of skyscrapers, parks, fountains, more than 700 bridges, and close-knit neighborhoods with a vibrant cultural life. The city has over 70 miles of urban riverfront—more than any other inland port city in America. The transformation of Pittsburgh from an industrial center to a leader in science and technology and the success of its rehabilitation efforts have moved President George W. Bush to call it "Knowledge Town," and the *Wall Street Journal* to rank it as one of the top technology markets (going so far as to nickname it "Roboburgh.")" (Advameg, Pittsburgh, 2008)

The Allegheny County Library Association is a federation of independently operated county libraries.

Population Information

Table 1 presents basic population data estimated in the 2007 American Community Survey from the Census Bureau for Allegheny County. The population has declined almost 5% since 2000; population decline has been a chronic issue for both Pittsburgh and Allegheny County over the past four decades. Birth rates are decreasing and there are few immigrants, so not enough people are coming into the area to offset death rates in an aging population.

The population is significantly older than the country as a whole. 16.9% of county residents were 65 or older in 2007, as compared with 12.5% on average nationally. While those aged 45-64 comprised 19.4% of the U.S. population, they made up 28.6% of Allegheny County. Together seniors and older adults represent almost half of the population in the county.

GENDER AND AGE	Estimate	Percent
Total population	1,219,210	100%
Male	581,635	47.7%
Female	637,575	52.3%
Under 5 years	64,458	5.3%
5 to 9 years	67,329	5.5%
10 to 14 years	73,447	6.0%
15 to 19 years	85,877	7.0%
20 to 24 years	81,737	6.7%
25 to 34 years	124,985	10.3%
35 to 44 years	166,429	13.7%
45 to 54 years	200,007	16.4%
55 to 59 years	84,213	6.9%
60 to 64 years	64,896	5.3%
65 to 74 years	91,239	7.5%
75 to 84 years	81,129	6.7%
85 years and over	33,464	2.7%

Table 8 -- Population, American Community Survey 2007, Allegheny County, PA

RACE AND ETHNICITY	Estimate	Percent
Total population	1,219,210	100.0%
White	1,007,644	84.0%
Black or African American	155,425	13.0%
American Indian and Alaska Native	1,678	0.1%
Asian	29,286	2.4%
Native Hawaiian and Other Pacific Islander	249	0.0%
Some other race	5,144	0.4%
Two or more races	19,784	1.6%
Hispanic or Latino	17,181	1.4%

Table 9 -- Population by Race/Ethnicity, American Community Survey 2007, Allegheny County, PA

By far, the majority of Allegheny County's population is white at 84%, nearly 10% higher than the national average. The next largest population by race identify themselves as Black or African American, and they account for 13% of the population, near the national average. In the remaining race categories, the area is not quite as diverse. While Hispanics represented 15.1% of the county, this area was home to only 1.4%. Overall, there are fewer immigrants in this area versus other urban areas; only 4.5% were born outside the U.S. as compared with 12.6% nationally. Since immigrants tend to be younger, the relative lack of immigration to the city contributes to its older demographics.

Allegheny County residents are well-educated. Although 54.4% nationally have attended at least some college, 58.2% in this area have. Many of those who began college continued for some time; 33.2% of residents hold a Bachelor's or higher degree, as compared to 27.5% nationwide. Unlike in many urban areas with an educated professional class, fewer of this area's working class fail to meet basic educational requirements; only 9.2% of residents did not finish high school, significantly lower than the 15.5% national average.

EDUCATIONAL ATTAINMENT	Estimate	Percent
Population 25 years and over	846,362	100%
Less than 9th grade	20,380	2.4%
9th to 12th grade, no diploma	57,468	6.8%
High school graduate (includes equivalency)	276,358	32.7%
Some college, no degree	138,061	16.3%
Associate's degree	73,365	8.7%
Bachelor's degree	165,852	19.6%
Graduate or professional degree	114,878	13.6%

Table 10 -- Educational Attainment for Population 25+, American Community Survey 2007, Allegheny County, PA.

Workforce Information

Industries

As might be expected based on an educated workforce, the percentage of Allegheny residents in management or professional occupations was higher than the national average of 34.6%. Fewer residents worked in farming, construction, or production jobs versus the rest of the country. The largest differences were to be found in the category of educational, health care, and social service workers, employing 27.5% of this county's residents but only 21.2% nationally.

OCCUPATION	Estimate	Percent
Civilian employed population 16 years and over	592,090	100.0%
Management, professional, and related occupations	237,875	40.2%
Service occupations	98,976	16.7%
Sales and office occupations	158,486	26.8%
Farming, fishing, and forestry occupations	505	0.1%
Construction, extraction, maintenance and repair occupations	40,638	6.9%
Production, transportation, and material moving occupations	55,610	9.4%

Table 11 -- Employment by Occupation, American Community Survey 2007, Allegheny County, PA

INDUSTRY	Estimate	Percent
Civilian employed population 16 years and over	592,090	100%
Agriculture, forestry, fishing and hunting, and mining	1,366	0.2%
Construction	30,929	5.2%
Manufacturing	49,714	8.4%
Wholesale trade	16,598	2.8%
Retail trade	65,597	11.1%
Transportation and warehousing, and utilities	32,543	5.5%
Information	13,846	2.3%
Finance and insurance, and real estate and rental and leasing	49,638	8.4%
Professional, scientific, and management, and administrative and waste management services	67,927	11.5%
Educational services, and health care and social assistance	162,985	27.5%
Arts, entertainment, and recreation, and accommodation, and food services	53,646	9.1%
Other services, except public administration	29,222	4.9%
Public administration	18,079	3.1%

Table 12 -- Employment by Industry, American Community Survey 2007, Allegheny County, PA

Employment Figures

Of the civilian population available and seeking employment, 5.7% was estimated to be unemployed at the time the 2007 American Community Survey was conducted. This represents 3.6% of the total population. This figure was slightly below the national average. Slightly more Allegheny residents choose to remain out of the labor force as compared to the nation as a whole.

EMPLOYMENT	Estimate	Percent
Population 16 years and over	997,845	100%
In labor force	628,959	63.0%
Civilian labor force	628,159	63.0%
Employed	592,090	59.3%
Unemployed	36,069	3.6%
Armed Forces	800	0.1%
Not in labor force	368,886	37.0%

Table 13 -- Employment Status, American Community Survey 2007, Allegheny County, PA

Income Information

The median household income in 2007 was \$46,401, somewhat lower than the national average of \$50,740. Since the cost of living is also proportionally lower (0.91 index) for the area, residents may be considered to live about as well as others across the country. (Advameg, Allegheny, 2008)

In 2007, the percent of families living below the poverty level was below the national rate (7.9% versus 9.5%,) but 55% of single mothers with children aged less than 5 lived in poverty.

INCOME	Estimate	Percent
Total households	520,946	100%
Less than \$10,000	43,651	8.4%
\$10,000 to \$14,999	35,843	6.9%
\$15,000 to \$24,999	64,162	12.3%
\$25,000 to \$34,999	59,664	11.5%
\$35,000 to \$49,999	72,191	13.9%
\$50,000 to \$74,999	96,685	18.6%
\$75,000 to \$99,999	59,589	11.4%
\$100,000 to \$149,999	52,042	10.0%
\$150,000 to \$199,999	17,403	3.3%
\$200,000 or more	19,716	3.8%
Median household income (dollars)	46,401	(X)
Mean household income (dollars)	65,909	(X)

Table 14 -- Income, American Community Survey 2007, Allegheny County, PA

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New Haven

Community Description

New Haven was settled in 1638 by Puritans and became the home of Yale University in 1718. Southern Connecticut State University, the University of New Haven, and Albertus Magnus College are also located in New Haven, and these universities are a major economic factor for the city today. After World War II, the city's middle class left for the suburbs, resulting in worsening economic conditions, the closing of downtown businesses, and a decline in population. New Haven began a series of urban renewal projects in 1957 and currently continues to undergo revitalization with the Livable City Initiative, the Elm City – Green and Clean initiative, and the re-development of the city center. New Haven received the All-American City Award from the National Civic League in 2003 and 1998. This award is given to communities that achieve results by working cooperatively to tackle major challenges. In addition to these civic accomplishments, New Haven is now becoming one of the major biotechnology research areas of the country. The city is located in south-central Connecticut on the Long Island Sound at the mouth of the Quinnipiac, Mill, and West rivers. It is a primarily urban community covering a little less than 19 square miles. (Advameg, 2008)

The city library issues cards only to city residents, but residents in surrounding areas may borrow materials with cards from their respective library systems.

Population Information

Table 1 presents basic population data estimated in the 2007 American Community Survey from the Census Bureau for the city of New Haven, CT. Women outnumber men in the area by slightly more than the national average. The population of New Haven declined by about 4,000 people between 2006 and 2007; this is not a statistically significant decline. The percentage of residents in the 45-64 (17.7%) and 65+ (9.1%) age ranges is slightly below the national averages of 19.4% and 12.4% respectively. The median age of the city is 29.5, significantly less than the national median of 36.7.

GENDER AND AGE	Estimate	Percent
Total population	123,475	100.0%
Male	59,732	48.4%
Female	63,743	51.6%
Under 5 years	7,979	6.5%
5 to 9 years	6,518	5.3%
10 to 14 years	6,702	5.4%
15 to 19 years	11,291	9.1%
20 to 24 years	16,741	13.6%
25 to 34 years	24,166	19.6%
35 to 44 years	16,951	13.7%
45 to 54 years	13,125	10.6%
55 to 59 years	5,008	4.1%
60 to 64 years	3,746	3.0%
65 to 74 years	5,600	4.5%
75 to 84 years	3,549	2.9%
85 years and over	2,099	1.7%

Table 15 – Population by Gender/Age, American Community Survey 2007, New Haven, CT

RACE AND ETHNICITY	Estimate	Percent
Total population	123,475	100.0%
White	58,842	49.1%
Black or African American	42,888	35.8%
American Indian and Alaska Native	184	0.2%
Asian	6,538	5.5%
Native Hawaiian and Other Pacific Islander	N/A	N/A
Some other race	11,405	9.5%
Two or more races	3,618	2.9%
Hispanic or Latino	30,133	24.4%

Table 16 -- Population by Race/Ethnicity, American Community Survey 2007, New Haven, CT

New Haven residents differ from the national averages in education level. Although fewer have attended at least some college (50.9% versus 54.4% for the nation,) the ones that do attend tend to be more likely to finish and to attain higher degrees. A surprisingly high 17.6% have obtained a master's, professional, or doctorate degree; this is far above the 10.1% national average.

“The city of New Haven draws from a highly skilled labor force. More than 5,000 college graduates enter the job market from New Haven's colleges each year.” (Advameg, 2008)

New Haven is more diverse than the country as a whole. There are more than three times as many African-Americans versus the national average of 12.7%, but a comparison with 2006 figures shows that there are fewer Blacks and more Whites versus the prior year. Hispanics constitute 24.4% versus the national average of 15.1%. Over half of the Hispanic population is of Puerto Rican descent. Although Hispanics may be of any race, most in New Haven identify themselves as White. An influx of immigrants--15.5% of residents were born outside the U.S.--may partially explain why New Haven has a lower median age as compared to the nation as a whole.

EDUCATIONAL ATTAINMENT	Estimate	Percent
Population 25 years and over	74,244	100%
Less than 9th grade	5,152	6.9%
9th to 12th grade, no diploma	8,271	11.1%
High school graduate (includes equivalency)	23,047	31.0%
Some college, no degree	11,646	15.7%
Associate's degree	3,924	5.3%
Bachelor's degree	9,102	12.3%
Graduate or professional degree	13,102	17.6%

Table 17 -- Educational Attainment for Population 25+, American Community Survey 2007, New Haven, CT

Workforce Information

Industries

“The city benefits from its close proximity to two major bioscience centers, New York and Boston. Local healthcare and pharmaceutical firms, along with Yale Medical School, constitute one of the major concentrations of bio-medical research in the nation... Because New Haven's major employers are utilities, hospitals, and educational institutions, long-term prospects for economic stability are good.” (Advameg, 2008)

While many New Haven residents work in other cities, thousands of people come to New Haven to work. Its major employers are universities, hospitals, and utilities. The six largest employers, in order of size, are Yale University, Yale New Haven Hospital, Hospital of St. Raphael, Southern New England Telephone Company, United Illuminating Company, and Southern Connecticut State University. Table 5 lists the number of people employed by business category.

OCCUPATION	Estimate	Percent
Civilian employed population 16 years and over	58,923	100.00%
Management, professional, and related occupations	20,871	35.4%
Service occupations	13,946	23.7%
Sales and office occupations	12,436	21.1%
Farming, fishing, and forestry occupations	347	0.6%
Construction, extraction, maintenance and repair occupations	4,185	7.1%
Production, transportation, and material moving occupations	7,138	12.1%

Table 18 -- Employment by Occupation, American Community Survey 2007, New Haven, CT

INDUSTRY	Estimate	Percent
Civilian employed population 16 years and over	58,923	100%
Agriculture, forestry, fishing and hunting, and mining	181	0.3%
Construction	3,468	5.9%
Manufacturing	5,410	9.2%
Wholesale trade	1,222	2.1%
Retail trade	5,946	10.1%
Transportation and warehousing, and utilities	1,829	3.1%
Information	1,322	2.2%
Finance and insurance, and real estate and rental and leasing	2,853	4.8%
Professional, scientific, and management, and administrative and waste management services	5,119	8.7%
Educational services, and health care and social assistance	23,362	39.6%
Arts, entertainment, and recreation, and accommodation, and food services	5,314	9.0%
Other services, except public administration	1,952	3.3%
Public administration	945	1.6%

Table 19 -- Employment by Industry, American Community Survey 2007, New Haven, CT

Employment Figures

Of the population available and seeking employment, 5.7% was estimated to be unemployed at the time the 2007 American Community Survey was conducted. This represents 8.8% of the total population. This figure is slightly above the national average. The Census bureau estimated that the entirety of the workforce could be classified as civilian. About the same percentage of New Haven residents choose to remain out of the labor force as compared to the nation as a whole.

EMPLOYMENT	Estimate	Percent
Population 16 years and over	100,542	100%
In labor force	64,625	64.3%
Civilian labor force	64,625	64.3%
Employed	58,923	58.6%
Unemployed	5,702	5.7%
Armed Forces	0	0.0%
Not in labor force	35,917	35.7%

Table 20 -- Employment Status, American Community Survey 2007, New Haven, CT

Income Information

The median household income in 2007 was \$39,409, which was 22% lower than the national average of \$50,740. The cost of living, however, is significantly higher in New Haven. When the metropolitan area as a whole is considered rather than just the city, the median income rises to \$59,916. Many of those employed in New Haven's city who can afford to live in the suburbs choose to do so.

In 2007, the percent of families living below the poverty level was almost double the national rate (15.8% versus 9.5%.) Fully 45% of the impoverished were female householder families with related children under 5 years. The city has made significant strides in reducing poverty, however. In 2000, more than 20% of city households lived in poverty.

INCOME	Estimate	Percent
Total households	46,713	100%
Less than \$10,000	6,170	13.2%
\$10,000 to \$14,999	2,888	6.2%
\$15,000 to \$24,999	6,414	13.7%
\$25,000 to \$34,999	5,384	11.5%
\$35,000 to \$49,999	7,502	16.1%
\$50,000 to \$74,999	7,954	17.0%
\$75,000 to \$99,999	4,587	9.8%
\$100,000 to \$149,999	3,882	8.3%
\$150,000 to \$199,999	1,067	2.3%
\$200,000 or more	865	1.9%
Median household income (dollars)	39,409	(X)
Mean household income (dollars)	52,274	(X)

Table 21 -- Income, American Community Survey 2007, New Haven, CT

References

U.S. Census Bureau. (2007). 2007 American Community Survey 1-Year Estimates for New Haven, CT (City Only.) Retrieved October 6, 2008 from <http://factfinder.census.gov>.

Advameg, Inc. (2008). New Haven: Economy. Retrieved October 6, 2008 from <http://www.city-data.com/us-cities/The-Northeast/New-Haven-Economy.html>.

Northeast Massachusetts

Community Description

The Northeast Massachusetts Regional Library System (NMRLS) encompasses 54 communities and serves almost 2 million residents. This includes all 34 towns in Essex County, most towns in the northern and eastern portions of Middlesex County (18) and 2 towns in Suffolk County, MA. Boston and Chelsea are located in Suffolk County but are not served by this system. According to 2007 data for the three counties, population has remained flat or grown only slightly in the areas served; geographical subdivisions numbering fewer than 65,000 are not targeted by the Census for yearly estimation and so figures are not available for the specific communities served.

Essex County is located in the Northeastern corner of Massachusetts, surrounded by Suffolk County to the south, the Atlantic Ocean to the east, and Middlesex County to the West. The county is home to a number of higher educational institutions ranging from private colleges to community colleges; the most well known institutions include Salem State College, Merrimack College, and Endicott College. There are 42 libraries in the County of Essex. Suffolk County includes the city of Boston. Boston's reputation as the Athens of America derives in large part from the teaching and research activities of more than 100 colleges and universities located in the Greater Boston Area, with more than 250,000 students attending college in Boston and Cambridge alone. Suffolk County is home to 36 libraries, including the State Library of Massachusetts. Middlesex County is just a short drive from the city of Boston and offers residents 79 libraries.

Because the areas served by this library system do not correspond well to areas estimated each year by the Census Bureau, the following method has been used to approximate demographic information. Using 2007 American Community Survey (ACS) data, figures for the three counties served were added, and then figures for cities not included in the service area but profiled by ACS (Boston, Cambridge, Framingham, Newton, and Somerville) were subtracted. Although certain unserved smaller municipalities/towns may be inadvertently included in this estimation method, it allows for a more current picture than the more-precise but outdated Census 2000 data.

Population Information

Table 1 presents basic population data estimated in the 2007 American Community Survey from the Census Bureau for the NMRLS service area.

Women outnumber men in the area. The percentage of residents in the 45-64 (27.8%) age range is significantly above the national average of 19.4% for this mostly-Boomer cohort. The area also is home to more seniors (13.4%) than the national average (12.5%).

As NMRLS acknowledged in its 1999 environmental scan, “Between 1987 and 1997 the number of Commonwealth residents over age 45 has increased by more than 12 percent while the total population is up only three percent. Other population growth ranges are ages 35 – 44 at 21 percent and 5 – 14 with an increase of over 17 percent. We need to prepare to serve growing numbers of an aging population and young adults while the population aged 15 – 34 is decreasing.”

GENDER AND AGE	Estimate	Percent
Total population	1974311	100%
Male	960765	48.7%
Female	1013546	51.3%
Under 5 years	124389	6.3%
5 to 9 years	116336	5.9%
10 to 14 years	136433	6.9%
15 to 19 years	130983	6.6%
20 to 24 years	115768	5.9%
25 to 34 years	223784	11.3%
35 to 44 years	313909	15.9%
45 to 54 years	321530	16.3%
55 to 59 years	126104	6.4%
60 to 64 years	99788	5.1%
65 to 74 years	131283	6.6%
75 to 84 years	93018	4.7%
85 years and over	40986	2.1%

Table 22 – Population by Gender/Age, American Community Survey 2007, NMRLS Region

RACE AND ETHNICITY	Estimate	Percent
Total population	1,974,311	100.0%
White	1,646,263	83.4%
Black or African American	63,042	3.2%
American Indian and Alaska Native	2,802	0.1%
Asian	114,700	5.8%
Native Hawaiian and Other Pacific Islander	234	0.0%
Some other race	112,454	5.7%
Two or more races	34,816	1.8%
Hispanic or Latino	183,111	9.3%

Table 23 -- Population by Race/Ethnicity, American Community Survey 2007, NMRLS Region

The NMRLS service area is less diverse than the nation as a whole. Residents are predominantly white (83.4%). Hispanic ethnicity is distinct from race. Since many who identify themselves as “some other race” tend to be white Latinos, the true number of whites is likely higher. The Hispanic population of 9.3% is lower than the national average of 15.1%. Blacks are under-represented (nationally 12.7%) and Asians over-represented (nationally 4.5%) in the region.

Residents of these Boston suburbs are well-educated, reflecting the availability of many institutions of higher learning in the area. Fewer people lacked a high-school diploma (10.8% versus 15.5% nationwide.) More people who start college finish it; nationally 19.5% attend some college but earn no degree, but this group includes only 15% of the NMRLS region. More than 40% in the area have at least a bachelor's degree, and fully 16.9% have obtained a master's, professional, or doctorate degree. These figures are far above the national averages of 27.5% and 10.1% respectively.

Workforce Information

Industries

The NMRLS community, although not including the city of Boston itself, is integrated into the greater metropolitan area economy. Many workers commute to the city to work.

“The economy of metropolitan Boston now primarily rests on high technology, finance, professional and business services, defense, and educational and medical institutions. The city's economy is more specialized in the financial, business and professional services and educational and medical sectors than the suburban economy, which is more specialized in high technology and the defense industry.” (Advameg, 2008)

“The medical schools of both Tufts University and Harvard University are located in Boston, as is Massachusetts General Hospital, the major teaching hospital for both schools. Education is a thriving segment of Boston's economy; within the city limits are 10 colleges and universities, 6 technical schools, 4 art and music schools, and 6 junior colleges. In towns and suburbs surrounding Boston, educational institutions include many prestigious secondary and boarding schools.” (Advameg, 2008)

EDUCATIONAL ATTAINMENT	Estimate	Percent
Population 25 years and over	1350402	100.0%
Less than 9th grade	58581	4.3%
9th to 12th grade, no diploma	87121	6.5%
High school graduate (includes equivalency)	360416	26.7%
Some college, no degree	203555	15.1%
Associate's degree	94134	7.0%
Bachelor's degree	318711	23.6%
Graduate or professional degree	227884	16.9%

Table 24 -- Educational Attainment for Population 25+, American Community Survey 2007, NMRLS Region

OCCUPATION	Estimate	Percent
Civilian employed population 16 years and over	1007655	100.0%
Management, professional, and related occupations	454537	45.1%
Service occupations	153385	15.2%
Sales and office occupations	241641	24.0%
Farming, fishing, and forestry occupations	2789	0.3%
Construction, extraction, maintenance and repair occupations	68601	6.8%
Production, transportation, and material moving occupations	86702	8.6%

Table 25 -- Employment by Occupation, American Community Survey 2007, NMRLS Region

INDUSTRY	Estimate	Percent
Civilian employed population 16 years and over	1007655	100.0%
Agriculture, forestry, fishing and hunting, and mining	4012	0.4%
Construction	57324	5.7%
Manufacturing	110449	11.0%
Wholesale trade	28663	2.8%
Retail trade	102740	10.2%
Transportation and warehousing, and utilities	34766	3.5%
Information	37877	3.8%
Finance and insurance, and real estate and rental and leasing	84883	8.4%
Professional, scientific, and management, and administrative and waste management services	152680	15.2%
Educational services, and health care and social assistance	237202	23.5%
Arts, entertainment, and recreation, and accommodation, and food services	74415	7.4%
Other services, except public administration	44185	4.4%
Public administration	38459	3.8%

Table 26 -- Employment by Industry, American Community Survey 2007, NMRLS Region

Employment Figures

The geographic area covered by this table differs from the others; the Census bureau did not provide data for Somerville for these variables, and so figures from that city have not been subtracted as was the case for other tables. Of the population available and seeking employment, 3.6% was estimated to be unemployed at the time the 2007 American Community Survey was conducted. This figure is slightly below the national average. A small but significant number of military personnel live in the region. Fewer residents choose to remain out of the labor force (31.8%) as compared to the nation as a whole (35.2%.) This is particularly significant given that residents are on average older and closer to the traditional retirement age as compared with most other areas.

EMPLOYMENT	Estimate	Percent
Population 16 years and over	1634237	100.0%
In labor force	1113798	68.2%
Civilian labor force	1112148	68.1%
Employed	1053742	64.5%
Unemployed	58406	3.6%
Armed Forces	1650	0.1%
Not in labor force	520439	31.8%

Table 27 -- Employment Status, American Community Survey 2007, NMRLS Region (See text.)

Income Information

Because the area is populated by highly educated individuals, with many holding management and professional positions, the salaries and cost of living are high. Housing is particularly expensive. The cost of living is 35% higher than the national average. Although median and mean incomes cannot be given due to the method of constructing these tables for the region, certain figures may give a clearer picture of income differences. Nationally, just under 20% of the population makes more than \$100,000 per year, but this rises to more than 35% of potential NMRLS patrons. Although only about 17% of area residents make less than \$25,000 per year, as compared with about 24% nationally, these individuals are particularly challenged with daily living expenses compared to the poor in other areas.

INCOME	Estimate	Percent
Total households	742094	100.0%
Less than \$10,000	43833	5.9%
\$10,000 to \$14,999	34266	4.6%
\$15,000 to \$24,999	57054	7.7%
\$25,000 to \$34,999	56237	7.6%
\$35,000 to \$49,999	82772	11.2%
\$50,000 to \$74,999	124805	16.8%
\$75,000 to \$99,999	103746	14.0%
\$100,000 to \$149,999	129571	17.5%
\$150,000 to \$199,999	54822	7.4%
\$200,000 or more	54988	7.4%

Table 28 -- Income, American Community Survey 2007, NMRLS Region

References

Northeast Massachusetts Regional Library System. (1999). Environmental Scan 1999. Retrieved October 10, 2008 from <http://www.nmrls.org/strategicplan/scan/environmentalscan.html>.

U.S. Census Bureau. (2007). 2007 American Community Survey 1-Year Estimates for Essex County, Middlesex County, Suffolk County, Boston, Cambridge, Framingham, Newton, and Somerville, MA. Retrieved October 10, 2008 from <http://factfinder.census.gov>.

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