

Lifelong Access

L I B R A R I E S

Redefining public library services to older adults

Leadership Institute 2008 Final Report

May

2009

The 2008 Lifelong Access Libraries Leadership Institute was held at the University of North Carolina at Chapel Hill.

UNC
Evaluation of
the Lifelong
Access
Libraries
Leadership
Institutes



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Lifelong Access Libraries Leadership Institute 2008 Final Report

May 2009

Submitted by

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Background

The School of Information and Library Science and Institute on Aging at Chapel Hill received contracts from the Libraries for the Future (LFF) to evaluate three national Lifelong Access Libraries Institute held in Chapel Hill, NC. For the first Institute, held from July 30-August 4, 2006, preliminary results were submitted to LFF in August 2006 and the full report of the 2006 Institute evaluation was submitted to LFF in November 2006.

The second Lifelong Access Libraries Leadership Institute was held in Chapel Hill, NC from July 29-August 3, 2007. A preliminary report of the 2007 Institute results with a comparison to the 2006 findings was submitted to LFF in March 2007. A final report for the 2007 Lifelong Access Libraries Institute was submitted in February 2009.

The third Lifelong Access Libraries Institute held in Chapel Hill, NC from July 27-30, 2008. A preliminary report of the 2008 Institute results with a cohort description of Fellows was submitted in February 2009.

The following report, submitted in May 2009, consists of the results from the baseline survey of Fellows at the 2008 Lifelong Access Libraries Institute as well as a follow-up survey mailed to Fellows six months after the Institute. This report also includes a description of the cohort of 2008 Fellows and the evaluation forms used.

Lifelong Access Libraries Leadership Institute 2008

Final Report

May 2009

Libraries for the Future (LFF) conducted the third national Lifelong Access Libraries Institute at the University of North Carolina, Chapel Hill from July 27-30, 2008. The Institute consisted of a 3-day training program that introduced attendees to the concept of Lifelong Access Libraries (LAL), including sessions on the social and biological aspects of aging and the need for a new approach to adult services that will promote ongoing civic engagement of older adults. This report summarizes the findings from the baseline survey and follow-up Fellows survey.

DATA COLLECTION

Baseline Lifelong Access Libraries Fellow Survey

In 2006 and 2007, the baseline survey consisted of a single questionnaire which was administered on the final day of the LAL Institute. In 2008, the baseline survey was distributed in two separate parts. The first part was mailed to Fellows prior to the Institute and the second part was distributed on the last day of the Institute and included the overall evaluation. Twenty-five baseline surveys were initially mailed out to participants and twenty-four were returned. At the Institute, twenty-three attendees completed the overall Institute evaluation (twenty-one Fellows and two observers). For all three years, the baseline survey included questions pertaining to organizational readiness for change, perceived barriers to programmatic success, attitudes toward the LAL initiative, value of Institute training, commitment to developing LAL innovations and a baseline measure on stage of implementation of LAL innovations. Demographics were also collected on respondents.

Follow-up Lifelong Access Libraries Fellow Survey

For the 2008 Institute, a follow-up survey was mailed out six months after the Institute; non-respondents received e-mail reminders and a telephone call. The follow-up survey focused on methods for sharing Institute information, developing LAL programming, factors facilitating and inhibiting programmatic success, outcomes of their LAL programs and the value of Institute training and ongoing LAL activities. The survey also contained questions on the stages of implementation and attitudes toward LAL initiative in the baseline survey, which allows for longitudinal comparison. In 2008, twenty-one individuals completed the survey.

Demographics

Respondents (n=24) were predominately female (83.3%) and white (87.5%). The average number of years working in libraries was 19.2 (Standard Deviation 11.3). The age range of the Fellows was 37 to 66 years old, with an average age of 52 years old.

FINDINGS

Descriptive statistics and significance tests (usually independent samples t-tests) were compiled using SPSS 16.0.

Results are reported in three ways: baseline (n=24), follow-up (n=23), or where possible, a comparison of baseline and follow-up (n=19). Findings are summarized by research topics.

Organizational Readiness for Change as Assessed by Fellows

The baseline survey included questions regarding the library's readiness for change. Fellows were asked to rate their level of agreement with several statements. See Table A.

- Majority of 2008 Fellows agree their library is able to handle change and has a good track record with handling change.
- Ninety-one percent reported their library leadership is open to risk taking and change.
- One hundred percent reported their library staff share information and cooperate on new initiatives with other departments.
- Most librarians noted their library staff was:
 - Open to sharing information
 - Skilled at managing change
- While most Fellows reported that user data are an integral part of decision making (91.3%), only 60.8% agreed their library has staff and resources dedicated to receiving and analyzing user surveys.
- Only about fifty percent of respondents felt that procedures are in place at their library to retain pertinent knowledge when library staff leaves employment.

Needed Resources

The baseline survey focused on resources that Fellows thought they needed for implementation. Respondents were asked "what resources do you think you will need to implement new initiatives for older adults?" Written responses are summarized below.

- Staff and volunteers
- Funding
- Dedicated time
- Training and guidelines
- Space

- Marketing tools
- Transportation
- Community partnerships
- Current demographics for surrounding community and target groups

Fellows also responded to the question, “How do you intend to find resources for these initiatives?” These responses are outlined below.

- Form community partnerships
- Friends of the library
- Public and private grants
- Bulletins and local newspapers
- Utilize volunteer pool
- Allocation of existing funds

Table A: Organizational Readiness for Change

	2008 n=23
Your library is able to deal with change.	95.6
Every member of your library’s staff understands and accepts the library’s overall goals and vision.	73.9
Members of the library staff are open to sharing knowledge and ideas, and knowledge and skills are efficiently and expediently transferred.	91.3
Procedures are in place to retain pertinent knowledge when library staff leaves employment.	52.1
Staff from different departments within your library share information sometimes and cooperate on new initiatives.	100.0
Change is not perceived as disruptive by members of your library’s staff.	47.8
Your library has a good track record in handling change.	87.0
Members of your library staff are able to handle more change at this time.	78.2
This library has staff and resources dedicated to receiving and analyzing user surveys.	60.8
User data are an integral part of decision making.	91.3
Members of your library’s staff feel that willingness to support change benefits them as well.	87.0
Members of your library’s staff feel respected and rewarded for working on change.	72.7
Your library leadership is open to risk taking and change.	91.3
Overall, your library is skilled at managing change.	95.7

Commitment to the Lifelong Access Initiative

At baseline (n=24), the evaluation team was interested in how committed the Fellows were to informing their library about new services to older adults and to developing services in their library. Respondents rated their commitment on a scale from 1 to 10, with 1 being “not at all committed” and 10 being “very committed”. See Table B.

Table B: Commitment to Lifelong Access Libraries Initiative (n=24)

	Mean (Std. Dev.)
Informing your library	9.8 (0.5)
Developing services in your library	9.6 (0.8)

Methods for sharing Institute information

At follow-up, respondents were asked how they shared what they learned at the Institute within their library, their community, both or neither. See Table C.

- Over half of the librarians arranged an informational meeting, made printed copies of Institute materials available, and encouraged staff to access the LAL Web site.
- Twenty-one percent of Fellows started an interest group and twenty-six percent of Fellows encouraged staff to attend the next LAL Institute.
- Respondents also noted additional methods for sharing information:
 - Held staff meeting
 - Debriefed with library directors
 - Prepared a comprehensive lifelong access plan
 - Meetings with community organizations and leaders

Table C. Methods employed to share LAL information in library and/or community (n=19)

	Library	Community	Both	Neither
Arranged an informational meeting	63.2%	10.5%	10.5%	15.8%
Started an interest group	21.1%	10.5%	10.5%	57.9%
Made printed copies of Institute materials available	68.4%	0.0%	5.3%	26.3%
Sent an email	42.1%	5.3%	31.6%	21.1%
Encouraged staff to access LAL website	63.2%	0.0%	10.5%	26.3%
Encouraged staff to attend the next Institute	26.3%	5.3%	5.3%	63.2%

Development of LAL Innovations

The evaluation team was interested in how LAL innovations were developing in the Fellows' libraries. At baseline and follow-up, respondents were asked to indicate their stage of implementation for seventeen LAL innovations. The stages of implementation were not interested, considering, pre-planning, planning, resources dedicated, staff dedicated and implemented. The follow-up survey included an additional stage, evaluated. Table D shows the number of Fellows who reported making progress with implementation of innovations from baseline to follow-up.

- All innovations had Fellows who made advancements in implementation.
- Fellows reported expanding collections (35.0%) and developing lifelong learning programs and services (35.3%).
- A quarter, or less made advancements in developing coalition building, creating a dedicated Web site, adapting fee-based and other revenue-generating activities, expanding collections, and programming such as job, career and life transition.

The follow-up survey also contained additional questions about the changes that librarians made to older adult programming in their library after the Institute. Respondents described the changes to their existing programs, and below is a summary of these responses.

- Expanded programming
- Assigned a dedicated staff member for older adult services
- Offered new courses (computer, Yoga)
- Started book clubs
- Developed a Web presence (i.e., blog)
- Joined the Boomer Volunteer Initiative
- Increased materials budget for large print and audio materials
- Developed an advisory council

Table D. Percent who advanced at least 1 stage of implementation from baseline to follow-up by LAL innovation (n=19):

	2008
Advisory Council	10.0%
Arts and cultural programming	30.0%
Civic engagement	30.0%
Coalition building	25.0%
Community conversations and forums	27.8%
Computer resources and training	30.0%
Dedicated space	30.0%
Dedicated staff	21.1%
Dedicated website	20.0%
Expanded collections	15.0%
Fee-based and other revenue-generating activities	21.1%
Health and wellness programming for older adults	35.0%
Intergenerational activities	42.1%
Job, career and life transition information	21.1%
Lifelong learning programs and services	36.8%
Marketing and outreach to boomers	42.1%
Oral history	15.8%

Successful LAL Innovations

In the follow-up survey, librarians were asked to describe their most successful LAL innovation. Below summarizes the comments.

- Re-careering series
- Yoga classes at the library
- Boost Your Brain Power at Your Library series
- Boomer Technology program including computer classes, Wii gaming, developing a Web site
- Developed a Second Life presence
- Adult Summer Reading Program
- Meet-the-author teas, special programs (i.e., Operas)
- Weekly library lectures with diverse topics
- Book discussions at local retirement communities
- Resource Fair
- Library's Outreach Services Advisory Committee

Factors facilitating successful LAL Innovations

Respondents were asked to think about their most successful LAL program and reflect on factors that facilitated the success of their most successful program. See tables E and F.

- Librarians perceived clear vision of program goals, user interest, and effective planning as the most important factors in facilitating success.
- Three quarters or more of Fellows indicated the following were somewhat or very important to programmatic success:
 - Community interest
 - Library leadership support/commitment
 - Community partnerships
 - Effective marketing
 - Librarian support/commitment
 - Space available in the library
 - Librarian support/commitment
 - Available parking for users
 - Volunteer support/commitment
 - Available public transit to/from the library
 - Financial resources
- Few librarians reported coordination with other branch libraries and older adult councils being applicable to their most successful program.

Table E. Of the facilitators that were applicable to all Fellows, percent who rated them somewhat or very important to facilitating the success of their most successful LAL program (n=19)

	Somewhat or very important	Not applicable
Clear vision of program goals	94.7%	5.3%
User interest	94.7%	5.3%
Community interest	89.5%	10.5%
Effective planning	95.0%	5.0%
Library Leadership support/commitment	84.2%	5.3%
Community partnerships	89.5%	5.3%
Effective marketing	85.0%	5.0%

Table F. Of the facilitators not applicable to all Fellows, percent who rated them somewhat or very important to facilitating the success of their most successful LAL program

	n	2008
Librarian support/commitment	18	88.9%
Volunteer support/commitment	19	78.9%
Space available in the library	20	75.0%
Available parking for users	20	75.0%
Available public transit to/from library	20	75.0%
Financial Resources	20	75.0%
Available Information Technology for users	19	73.7%
Board Leadership support/commitment	18	72.2%
Dedicated LAL program staff	20	70.0%
Available needs assessment data	20	65.0%
Dedicated coordinator of LAL programs	20	65.0%
Available program evaluation data	20	60.0%
Library's proximity to other community gathering places	20	60.0%
Training available for library staff	20	60.0%
Training available for volunteers	19	57.9%
Coordination with other branch libraries	19	47.4%
Older adult advisory council	19	42.2%

Factors facilitating successful LAL Innovations cont.

The follow-up survey also asked respondents to list the five most important factors to programmatic success. The list below summarizes the most common responses.

- Funding
- Effective marketing
- Parking
- Advisory Council
- Refreshments
- Commitment and participation of staff, library administrators and board
- Space available in the library
- Community/customer interest
- Strong community partnerships
- Adequate resources
- Dedicated staff to LAL programming
- Programs responsive to users' needs and interests

Barriers to developing LAL programs

At baseline, respondents were asked to contemplate their role as a change agent in their library and reflect on how likely various factors were to be barriers to change. For each barrier listed below, they were asked to rate it on a scale of 1, *least likely*, to 10, *most likely*. See Table G.

In general, Fellows perceived space availability and financial resources as the greatest barriers to change as these two means are rated above 5. Of the other barriers listed, the following top the list of likely barriers:

- Appropriate Materials and Supplies
- Staff Skills
- Staff Involved in Implementation
- Data for Decision-making
- Staff Enthusiasm
- Community Interest

Table G: Perceived Barriers to Change (n=23)

Barriers	Mean (Std. Dev.)
Financial Resources	6.7 (2.5)
Space Availability	6.4 (2.6)
Data for Decision-making	4.8 (2.5)
Staff Involved in Implementation	4.5 (2.7)
Appropriate Materials and Supplies	4.5 (2.2)
Staff Skills	4.4 (2.4)
Staff Enthusiasm	4.3 (2.0)
Community Interest	4.1 (2.7)
Information & Tech Systems Available	3.9 (2.2)
User Interest	3.8 (2.5)
Librarian Support/Commitment	3.7 (2.3)
Board Leadership	3.6 (2.8)
Partnerships	3.5 (2.8)
Library Leadership	3.2 (2.8)

In the follow-up survey, Fellows were given the opportunity to comment on the factors that actually impeded the success of LAL programs. Respondents reported a lack of the following:

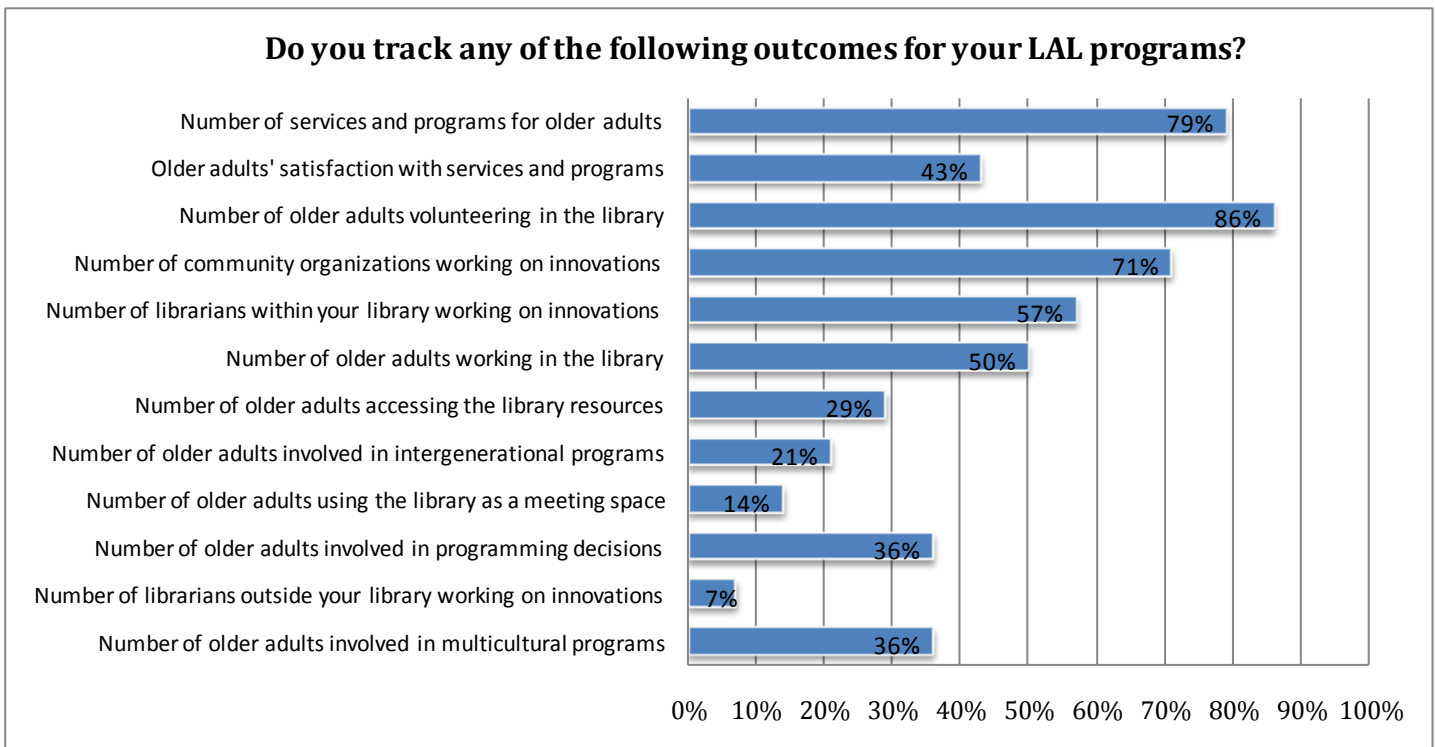
- Lack of funding
- Low attendance rates at programs/events
- Need more publicity, better marketing
- Limited staff
- Not enough time
- Available space in the library
- Equipment to accommodate needs of older adults (e.g. hearing devices)
- Understanding of the needs and interests of older adults

Outcomes of LAL innovations

The evaluation team was interested in the outcomes of LAL innovations. The follow-up measures focused on identifying which outcomes Fellows tracked and the perception of the outcomes from their LAL programs. Respondents reported which outcomes of their LAL innovations they were tracking. See Graph 1 for a comparison of tracking outcomes.

- Most librarians indicated tracking the number of older adults using the library.
- The number of services and programs for older adults.
- The number of community organizations working on innovations
- Few Fellows tracked the number of outside librarians working on innovations and the number of older adults using the library as a meeting space.

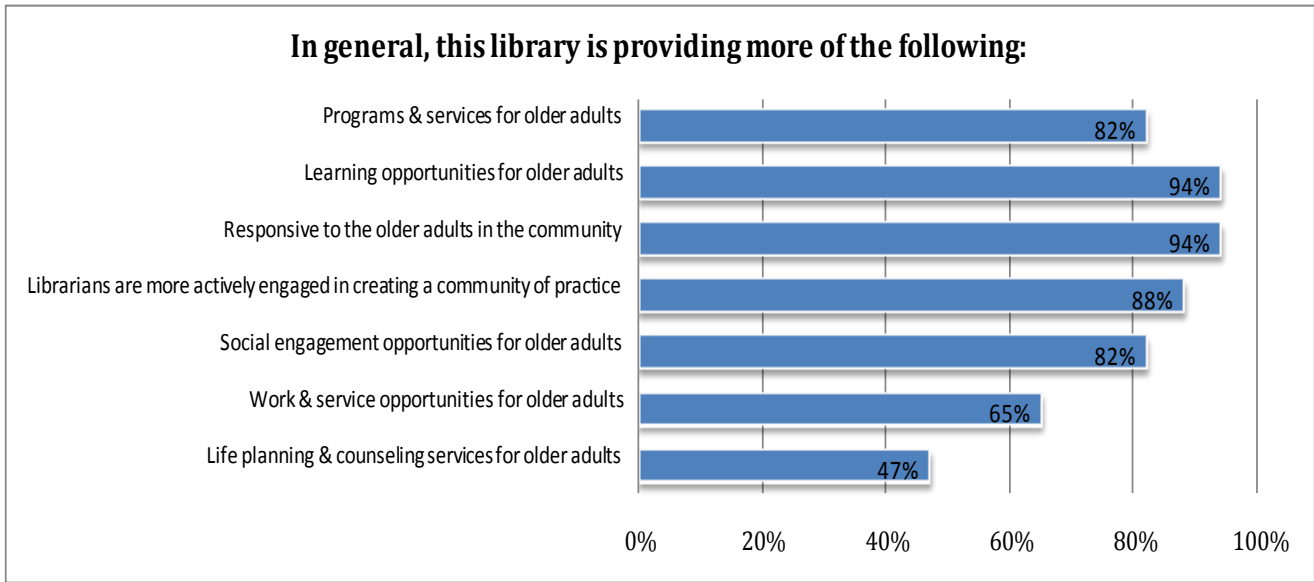
Graph 1. Percent of Fellows who are tracking outcomes for their LAL programs



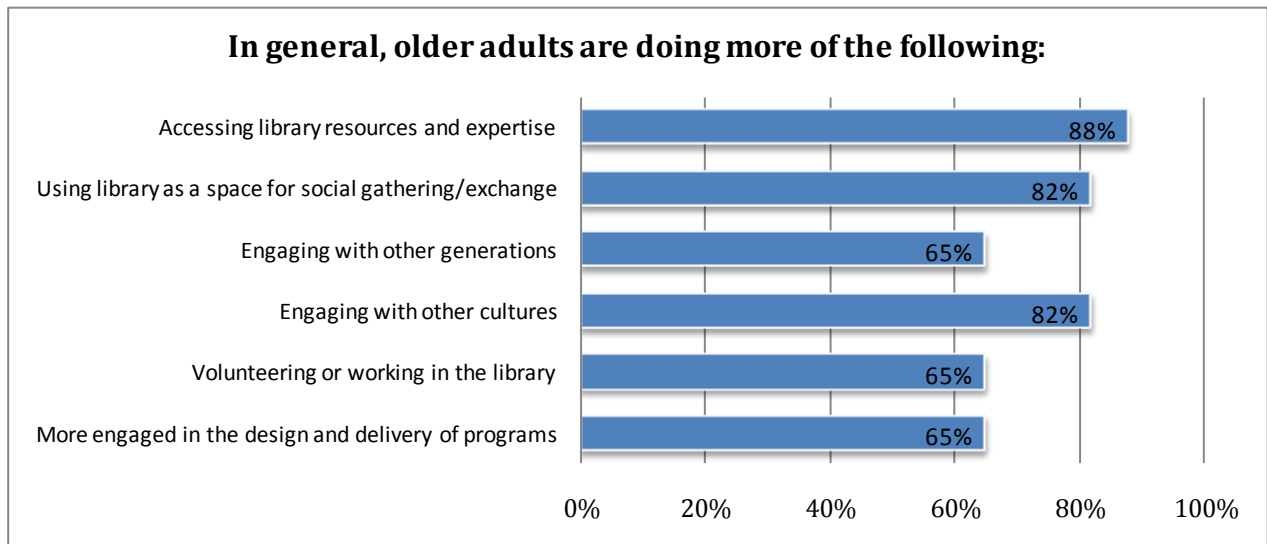
Fellows were asked to think about the outcomes of their LAL programs and indicated how much they agree with a series of statements. See Graphs 2-3.

- The majority respondents agreed that their libraries were offering more learning opportunities for older adults and were responsive to the older adults in the community.
- Most librarians indicated their libraries were creating more programs and services for older adults and offering social engagement opportunities for older adults, and librarians were more actively engaged in creating a community of practice.
- In regard to older adults, eighty percent or more of librarians reported older adults were doing more of the following:
 - Accessing more library resources and expertise
 - Using the library as a space for social gathering/exchange
 - Engaging with other cultures

Graph 2. Perceived outcomes of Fellows' LAL programming



Graph 3. Perceived outcomes of Fellows' LAL programming



Attitudes toward Lifelong Access Libraries Initiative

At baseline and follow-up, Fellows were asked to respond to questions regarding their opinions of LAL as an innovation. See Table H.

- At follow-up, most respondents felt that:
 - Other libraries will be interested in finding out about Lifelong Access Libraries initiatives.
 - Lifelong Access Libraries initiatives have the potential to transform and improve library services to older adults.
 - The Lifelong Access Libraries approach has advantages over the way that libraries have provided services to older adults in the past.
 - The Lifelong Access Libraries approach fits well with the values held by librarians.
 - The library profession will embrace Lifelong Access Libraries.
- Fewer respondents felt that libraries will be able to find resources to support Lifelong Access Libraries initiatives.
- There was a decrease in the number of librarians who agreed it will be difficult to find resources for the initiative from 100.0% at baseline to 73.7% at follow-up.
- At follow-up, more respondents (35.0%) felt that it will be tough to implement Lifelong Access Libraries initiatives than at baseline (25.0%).

Table H. Attitudes towards LAL as an Innovation

Knowing what you know now, please indicate the extent to which you agree with the following:	Percentage who strongly agreed or agreed	
	Baseline (n=24)	Follow-up (n=20)
Lifelong Access Libraries initiatives have the potential to transform and improve library services to older adults.	100.0%	100.0%
The Lifelong Access Libraries approach has advantages over the way that libraries have provided services to older adults in the past.	100.0%	100.0%
The Lifelong Access Libraries approach fits well with the values held by librarians.	95.9%	100.0%
The library profession will embrace Lifelong Access Libraries.	100.0%	100.0%
Lifelong Access Libraries as a concept is difficult to understand.	12.5%	0.0%
It will be tough to implement Lifelong Access Libraries initiatives.	25.0%	35.0%
Libraries will be able to find resources to support Lifelong Access Libraries initiatives.	100.0%	73.7%
Our library users are <u>not</u> very interested in Lifelong Access Libraries services.	0.0%	5.0%
Other libraries will be interested in finding out about our Lifelong Access Libraries initiatives.	100.0%	100.0%
I feel comfortable that we can try out some of the Lifelong Access Libraries initiatives before we make a full commitment.	100.0%	95.0%

Value of LAL Institute training

The baseline survey asked respondents to rate how confident they were in their understanding of several knowledge and skill areas before and at the end of the Institute. Fellows used a scale from 1 for “Not at all confident” to 4 for “Completely confident.” Table I below summarizes the results.

- Fellows experienced significant increases in their confidence in their level of knowledge in all areas.¹
- Fellows described the most growth (mean differences greater than 1.0) in knowledge in the areas of:
 - Trends and demographics of aging
 - Characteristics and needs of the lifelong learner
 - Boomer expectations about post-retirement employment and civic engagement
 - How to access information resources on aging
 - How to implement lifelong access library initiatives

Table I: Average Confidence Rating in Knowledge Before and After the Institute (n=22)

	Before Institute Mean (Std. Dev.)	At the end of Institute Mean (Std. Dev.)
Trends and demographics of aging*	2.3 (0.7)	3.3 (0.5)
Needs of a diverse cultural communities*	2.7 (0.6)	3.2 (0.5)
Principles of intergenerational programming*	2.1 (0.6)	2.8 (0.7)
Characteristics and needs of the lifelong learner	2.3 (0.6)	3.3 (0.4)
Partnerships and collaborations*	3.0 (0.8)	3.6 (0.5)
Boomer expectations about post-retirement employment and civic engagement	2.2 (0.8)	3.4 (0.6)
Health and aging	2.3 (0.6)	3.2 (0.6)
How to access information resources on aging*	2.4 (0.8)	3.4 (0.6)
How to implement Lifelong Access Library initiatives	1.8 (0.6)	3.1 (0.6)
How to evaluate library services*	2.5 (0.7)	3.2 (0.7)
Assets and needs assessments*	2.3 (0.7)	3.0 (0.7)
How to identify program outcomes*	2.5 (0.8)	3.0 (0.8)
How to identify resources on logic models*	1.6 (0.8)	2.5 (0.8)
How to identify methods for data collection*	2.3 (0.8)	2.9 (0.7)

*p<0.05

¹ A paired t-test was performed to test for significant differences in confidence before and at the end of the Institute. (n=22)

In the follow-up survey, librarians reported the usefulness of the LAL Institute training. Fellows ranked the usefulness of training topics as either not at all, a little, somewhat or very useful. See Table F.

- The majority of librarians found the training on characteristics and needs of the lifelong learner, partnerships and collaborations, boomer expectations about post-retirement employment and civic engagement, health and aging, and trends and issues in aging very useful.
- The following training areas were rated as very, somewhat or a little useful by all librarians:
 - Characteristics and needs of the lifelong learner
 - Partnerships and collaborations
 - Boomer expectations about post-retirement employment and civic engagement
 - Health and aging
 - How to access information resources on aging
 - How to implement lifelong access library initiatives
 - Trends and issues in aging
 - Needs of a diverse cultural community
- Twenty percent of respondents reported the session on “How to identify resources on logic models” not at all useful.

Table J. Perceived usefulness of LAL training (n=21)

	Not at all useful	Somewhat or a little useful	Very useful
Trends and issues in aging	0.0%	19.0%	81.0%
Needs of a diverse cultural community	0.0%	61.9%	38.1%
Principles of intergenerational programming	4.8%	57.2%	38.1%
Characteristics and needs of the lifelong learner	0.0%	19.0%	81.0%
Partnerships and collaborations	0.0%	19.0%	81.0%
Boomer expectations about post-retirement employment and civic engagement	0.0%	14.3%	85.7%
Health and aging	0.0%	14.3%	85.7%
How to access information resources on aging	0.0%	52.4%	47.6%
How to implement lifelong access library initiatives	0.0%	47.6%	52.4%
How to evaluate library services	4.8%	61.9%	33.3%
Assets and needs assessments *	9.5%	61.9%	28.6%
How to identify program outcomes *	4.8%	61.9%	33.3%
How to identify methods for data collection *	4.8%	76.2%	19.0%
How to identify resources on logic models *	20.0%	60.0%	20.0%

*not included in the 2008 Institute

Fellows were asked to list additional training topics that should be added to the 2008 Institute. Respondents noted the following topics.

- More on how to implement specific programs and more program ideas
- Adult summer reading, technology classes, grant funding opportunities series (continuous programs), more on volunteers
- Differences between the generations
- Turning competitors into partners (other lifelong learning groups)
- Learning styles
- Marketing your services to active older adults
- Challenges of services to non-English speakers
- More time to process information, ask questions and discuss.

Value of ongoing LAL activities

At follow-up, Fellows reported on the usefulness of ongoing LAL activities. See Table G.

- About half of the respondents noted the Leadership Institute notebook was very useful.
- Most of the respondents reported the communications from LFF (68%) and other Fellows (68%) were somewhat or a little useful.
- Half of librarians did not attend LAL meetings at conferences and more than a quarter did not utilize the LFF listserv.

Table K. Perceived usefulness of ongoing LAL activities (n=18)

	Not at all useful	Somewhat or a little useful	Very useful	Not Used
Communications from LFF	5.3%	68.4%	21.1%	5.3%
Communication with other Fellows	5.3%	68.4%	21.1%	5.3%
LAL website	5.3%	57.9%	31.6%	5.3%
Meetings at conferences	5.3%	26.4%	15.8%	52.6%
LAL Leadership Institute Notebook	0.0%	36.8%	57.9%	5.3%
LFF listserv	0.0%	47.4%	26.3%	26.3%
LFF Blog	11.1%	55.5%	16.7%	16.7%
LFF Monthly Newsletter	0.0%	61.1%	22.2%	16.7%

The survey included questions about how librarians are using the LAL Web site and Leadership Institute notebook after the Institute.

- Most respondents (85%) had accessed the LAL Web site since the Institute. Of those using the Web site (n=20), the Fellows reported accessing the LAL Web site sporadically.
- One hundred percent of respondents (n=21) noted utilizing their LAL Leadership Institute notebook. Participants wrote suggestions for improving the notebook:
 - Instead of numbered tabs, index by topic
 - Consider putting background articles on a CD and use paper only for actual exercises
 - Only include the handouts from the sessions
 - Include pages for note taking

APPENDICES

1. Lifelong Access Libraries Leadership Institute 2008 Agenda
2. Fellow Survey instruments

APPENDIX 1: Lifelong Access Libraries Leadership Institute 2008 Agenda

The Lifelong Access Libraries Leadership Institute

July 27–July 30, 2008

University of North Carolina at Chapel Hill, NC

AGENDA

Sunday, July 27

Carolina Inn, Chapel Hill, NC

3:00 pm

Registration and Check-in

6:00 pm

Reception and Dinner
Welcoming Remarks

Diantha D. Schull, Director, Lifelong Access Libraries
Jose Marie Griffiths, Dean, UNC School of Information and Library Science
Victor Marshall, Director, UNC Institute on Aging
Mary L. Boone, State Librarian of North Carolina
Irene Owens, Dean, School of Library Science, North Carolina Central University

Monday, July 28

Sonja Haynes Stone Center – Hitchcock Room

8:00 am

Continental Breakfast

8:45 am

Overview of Lifelong Access Libraries Leadership Institute
Diantha D. Schull, Libraries for the Future
Stephen Ristau, Libraries for the Future

9:15 am

Trends and Issues in Aging
1.1 Longevity From a Humanistic Perspective
Harry (Rick) Moody, AARP, Vice President of Academic Affairs

10:00 am

BREAK

10:15 am

1.2 Understanding Boomers: A Demographic Overview
Victor Marshall, Director, UNC Institute on Aging

- 11:00 am **1.3 *When Lifelong Learning Becomes Active Wisdom***
Mary Catherine Bateson, Anthropologist and Author
- 11:45 am **1.4 *Panel Discussion Q&A: Boomers and Libraries: Why Now?***
Rick Moody, Mary Catherine Bateson, Dennis Streets, NC State Division
of Aging and Adult Services, and Mary Boone, North Carolina State
Librarian, Stephen Ristau, (facilitator)
- 12:30 pm **LUNCH – Sonya Haynes Stone Center**
- 1:30 pm **Key Opportunities: Lifelong Learning and Civic Engagement**
1.5 *Learning Across the LifeSpan*
Eleanor Drago-Severson Educator, Author, Researcher
Columbia University Teachers College
- 2:30 pm **1.6 *Civic Engagement: A Critical Perspective***

**Sabrina Reilly, Associate Director, *Civic Engagement*, National Council
on Aging**
Jill Friedman Fixler, Consultant and Author, JF Fixler and Associates
Stephen Ristau, Libraries for the Future
- 3:30- 3:45 pm ***Panel Discussion Q&A: Lifespan Learning and Civic Engagement***
Eleanor Drago-Severson, Sabrina Reilly, and Jill Friedman Fixler,
Stephen Ristau (facilitator)
- 3:45 pm **BREAK**
- 4:00 pm **1.7 *Interactive Exercise***
Hagar Shirman, Libraries for the Future
- 4:45 pm Adjourn
- 5:00 pm Optional
Tour of SILS Library and UNC Campus
Rebecca Vargha, Library Director, and
Joanne Marshall, Distinguished Alumni Professor, UNC School of
Information and Library Science
- Evening Independent dinners

<u>Tuesday-July 29</u>	Wilson Library – Pleasants Room
8:00 am	Continental Breakfast
8:15 am	Boomers: Health and Diversity <i>Convene– Welcome and Introduction to the Day’s Topics</i> Stephen Ristau/Diantha Schull, Libraries for the Future
8:30 am	2.1 “When I’m 64”- Older Adults and Boomers Getting Healthy Mary Altpeter, Associate Director for Program Development, UNC Institute on Aging
9:30 am	2.2 Redefining Aging: Brain Research Paul Nussbaum, Clinical Neuropsychologist, Author and Educator
10:30 am	BREAK
10:45 am	2.3 Health and Diversity Debra Barksdale, Educator, Nurse Practitioner, and Researcher UNC School of Nursing
11:15 am	2.4 Consumer Health: Implications for Public Libraries Suzanne Flint (2006 Lifelong Access Fellow) Library Development Services Consultant, California State Library
11:30 am	Panel Discussion Q&A: Boomers, Brains and Health Paul Nussbaum, Debra Barksdale, and Suzanne Flint
12:00 pm	LUNCH – Wilson Library – Pleasants Room Special exhibit from Wilson Library’s Rare Book Collection
1:00 pm	Leading Library Innovation 2.5 Leading Library Innovation Mark Winston, Educator and Consultant, UNC School of Information and Library Science
2:00 pm	2.6 Stories from the Field: Programs, Partnerships, and Marketing Abigail Elder and Jane Salisbury (2006 Lifelong Access Fellows) Multnomah County Public Library and <i>Life by Design NW</i> , Portland, OR Mary Campbell (2007 Lifelong Access Fellow) Cumberland Public Library, Fayetteville, NC Selma Thomas, Producer, Watertown Productions
3:00 pm	BREAK
3:15 pm	2.7 Lifelong Access: Framework for Converting Theory to Practice Hagar Shirman, Libraries for the Future

- 4:45 pm **Adjourn**
- 5:15 pm Optional
Yoga Class with Joanne Marshall
- Evening **Group dinner at informal location**
Spanky's Restaurant
101 East Franklin Street
Chapel Hill, NC 27514

Wednesday-July 30 Sonja Haynes Stone Center— Hitchcock Room

- 8:00 am **Continental Breakfast**
- 8:15 am **Convene**
- 8:30 am **Purposeful Living After 50**
3.1 *Work After 50: Purpose and Necessity*
A Spectrum of Opportunities for Boomers, Communities and Libraries

Judy Goggin, Vice President, Civic Ventures
Iowaka Barber, Program Officer, ReServe
Stephen Ristau, Libraries for the Future
- 9:30 am **BREAK**
- 9:45 am **3.2 *The Five Patrons You Meet in Retirement: Post-Career Life***
Models and Information and Learning Needs
Ron Manheimer, Executive Director, NC Center for Creative Retirement
- 10:45 am **3.3 *Building Creative Partnerships***
Susan Perlstein, founder, Elders Share the Arts and
Education Director, Nat'l Center for Creative Aging
- 11:45 am ***Evaluating the Institute***
Joanne Marshall, UNC School of Information and Library Science
- 12:00 pm **LUNCH**
Lifelong Access Libraries in Action
3.4 *Discussion: What does it mean to be a Lifelong Access*
Fellow?
Diantha Dow Schull, Joanne Marshall and Stephen Ristau

- 1:30 pm **3.5 *Stories from the Field: Leadership and Innovation***

 Suzanne Flint (2006 Lifelong Access Fellow)
 California State Library *Transforming Life After 50* Initiative
 Kathy Graybeal (2007 Lifelong Access Fellow)
 Delaware Deputy State Librarian
- 2:15 pm **3.6 *Creating an Action Plan***
 Hagar Shirman and Stephen Ristau, Libraries for the Future
- 3:15 pm **Evaluation**
 3.7 *Evaluations and Documentation*
 Joanne Marshall, UNC School of Information and Library Science
- 3:45 pm ***Closing Remarks***

 Adjourn

APPENDIX 2: Fellows Survey Instruments

Libraries for the Future
Lifelong Access Libraries™ Institute 2008
July 27 – 30, 2008

Follow-up Survey of 2008 Participants

As a participant in the Libraries for the Future’s Lifelong Access Libraries™ (LAL) Institute, we are interested in what impact the 2008 Institute had on you as a Fellow and your library. Your experiences and opinions are crucial in understanding how the LAL programs are being developed in libraries and how the Institute can be improved.

Please answer the questions, and return the survey in the enclosed postage pre-paid envelope.

1. Did you do any of the following to share what you learned at the Institute in your library or in your community?

Please check all that apply.

	In my library	In my community
1.1 Arranged an informational meeting	<input type="checkbox"/>	<input type="checkbox"/>
1.2 Started an interest group	<input type="checkbox"/>	<input type="checkbox"/>
1.3 Made printed copies of Institute materials available	<input type="checkbox"/>	<input type="checkbox"/>
1.4 Sent an email	<input type="checkbox"/>	<input type="checkbox"/>
1.5 Encouraged staff to access LAL website	<input type="checkbox"/>	<input type="checkbox"/>
1.6 Encouraged staff to attend the next Institute	<input type="checkbox"/>	<input type="checkbox"/>
1.7 Other:	<input type="checkbox"/>	<input type="checkbox"/>
1.8 Other:	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

2. We are interested in understanding where you and your library are now in the process of developing LAL programs and services for older adults. Which of the following items have been considered or implemented in your library?

Please circle only one answer for each item.

	Not Interested	Considering	Pre-Planning	Planning	Resources Dedicated	Staff Dedicated	Implemented	Evaluated
2.1 Advisory Council: involving older adults in program and services planning	1	2	3	4	5	6	7	8
2.2 Arts and cultural programming: including performances, exhibitions and participatory activities for older adults	1	2	3	4	5	6	7	8
2.3 Civic engagement: such as referrals to meaningful work in the community and/or opportunities for meaningful volunteer work for older adults at the library	1	2	3	4	5	6	7	8
2.4 Coalition building: organizing or participating in multi-partner initiatives that promote community connections and productive aging	1	2	3	4	5	6	7	8
2.5 Community conversations and forums: on public affairs, retirement, local issues, etc.	1	2	3	4	5	6	7	8
2.6 Computer resources and training: including basic and advanced computer use for communications, research, etc. for older adults	1	2	3	4	5	6	7	8
2.7 Dedicated space: promoting connections, collections and programs of interest to active older adults	1	2	3	4	5	6	7	8
2.8 Dedicated staff: with specific responsibilities for working with active older adults	1	2	3	4	5	6	7	8
2.9 Dedicated website: providing information and connections to promote productive aging	1	2	3	4	5	6	7	8
2.10 Expanded collections: including print, digital and audio resources to support learning and engagement for older adults	1	2	3	4	5	6	7	8
2.11 Fee-based and other revenue-generating activities: including membership-based activities and earned income to support older adult programming	1	2	3	4	5	6	7	8
2.12 Health and wellness programming for older adults	1	2	3	4	5	6	7	8

	Not Interested	Considering	Pre-Planning	Planning	Resources Dedicated	Staff Dedicated	Implemented	Evaluated
2.13 Intergenerational activities: promoting communications and improving understanding among different age groups	1	2	3	4	5	6	7	8
2.14 Job, career and life transition information: such as counseling, information, referrals and peer-led programs for career development for older adults	1	2	3	4	5	6	7	8
2.15 Lifelong learning programs and services: informal and formal learning options such as lectures, workshops, book discussions and academic partnership programs for older adults	1	2	3	4	5	6	7	8
2.16 Marketing and outreach to boomers: activities to promote public awareness and use of libraries for active aging	1	2	3	4	5	6	7	8
2.17 Oral history and other activities to preserve a legacy for future generations	1	2	3	4	5	6	7	8
2.18 Other innovation: specify:	1	2	3	4	5	6	7	8
2.19 Other innovation: specify:	1	2	3	4	5	6	7	8
2.20 Other innovation: specify:	1	2	3	4	5	6	7	8

3. Following the Institute, did you make any changes in your existing LAL programs? (Please circle)

YES

NO

If yes, please describe:

4. Since the Institute, have you **initiated** any new LAL programs? (Please circle)

YES

NO

If yes, please describe:

5. Since the Institute, have you **discontinued** any LAL programs? (Please circle)

YES

NO

If yes, please describe:

6. What is your **most successful** LAL Program? Please name and describe.

7. Thinking about your **most successful** program, how important were the following in facilitating the success of your program?

Please circle one answer for each item.

	Not at all important	A little important	Somewhat important	Very important	Not Applicable
7.1 Library leadership support/commitment	1	2	3	4	9
7.2 Board leadership support/commitment	1	2	3	4	9
7.3 Librarian support/commitment	1	2	3	4	9
7.4 Volunteer support/commitment	1	2	3	4	9
7.5 Clear vision of program goals	1	2	3	4	9
7.6 User interest	1	2	3	4	9
7.7 Community interest	1	2	3	4	9
7.8 Community partnerships	1	2	3	4	9
7.9 Coordination with other branch libraries	1	2	3	4	9
7.10 Other	1	2	3	4	9

8. Thinking about your **most successful** program, how important were the additional factors in facilitating the success of your program?

Please circle one answer for each item.

	Not at all important	A little important	Somewhat important	Very important	Not Applicable
8.1 Financial resources	1	2	3	4	9
8.2 Effective planning	1	2	3	4	9
8.3 Effective marketing	1	2	3	4	9
8.4 Available needs assessment data	1	2	3	4	9
8.5 Available program evaluation data	1	2	3	4	9
8.6 Dedicated LAL program staff	1	2	3	4	9
8.7 Dedicated coordinator of LAL programs	1	2	3	4	9
8.8 Training available for library staff	1	2	3	4	9
8.9 Training available for volunteers	1	2	3	4	9
8.10 Older adult advisory council	1	2	3	4	9
8.11 Space available in the library	1	2	3	4	9
8.12 Available Information Technology for users	1	2	3	4	9
8.13 Available parking for users	1	2	3	4	9
8.14 Available public transit to/from library	1	2	3	4	9
8.15 Library's proximity to other community gathering places	1	2	3	4	9
8.16 Other:	1	2	3	4	9
8.17 Other:	1	2	3	4	9

9. Please list what you consider to be the five most important factors for ensuring the success of any LAL program (whether or not these were available to you.)

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____

10. What **barriers**, if any, have you experienced in developing LAL programs?
Please list and describe:

11. Knowing what you know now, please indicate the extent to which you agree or disagree with the following statements about the LAL concept.

Please circle only one answer for each item.

	Strongly Disagree	Disagree	Agree	Strongly Agree
11.1 LAL initiatives have the potential to transform and improve library services to older adults.	SD	D	A	SA
11.2 The LAL approach has advantages over the way that libraries have provided services to older adults in the past.	SD	D	A	SA
11.3 The LAL approach fits well with the values held by librarians.	SD	D	A	SA
11.4 The library profession will embrace Lifelong Access Libraries.	SD	D	A	SA
11.5 LAL as a concept is difficult to understand.	SD	D	A	SA
11.6 It is tough to implement LAL initiatives.	SD	D	A	SA
11.7 Libraries will be able to find resources to support LAL initiatives.	SD	D	A	SA
11.8 Our library users are not very interested in LAL services.	SD	D	A	SA
11.9 Other libraries will be interested in finding out about our LAL initiatives.	SD	D	A	SA
11.10 I feel comfortable that we can try out some of the LAL initiatives before we make a full commitment.	SD	D	A	SA
11.11 I like to share my experience with LAL initiatives with other librarians.	SD	D	A	SA

12. Please indicate your current view regarding the **outcomes** of your LAL program.

Please circle only one answer for each item.

	Strongly Disagree	Disagree	Agree	Strongly Agree
12.1 More older adults are using this library as a space for social gathering/exchange.	SD	D	A	SA
12.2 More older adults are accessing our library resources and expertise.	SD	D	A	SA
12.3 Older adults are more engaged in the design and delivery of services and programs.	SD	D	A	SA
12.4 More older adults are volunteering or working in the library.	SD	D	A	SA
12.5 More older adults are engaging with other generations.	SD	D	A	SA
12.6 More older adults are engaging with other cultures.	SD	D	A	SA
12.7 This library is offering more programs and services for older adults.	SD	D	A	SA
12.8 This library is providing more life planning and counseling services for older adults.	SD	D	A	SA
12.9 This library is providing more learning opportunities for older adults.	SD	D	A	SA
12.10 This library is offering more work and service opportunities for older adults.	SD	D	A	SA
12.11 This library is offering more social engagement opportunities for older adults.	SD	D	A	SA
12.12 This library is more responsive to the older adults in this community.	SD	D	A	SA
12.13 Librarians are more actively engaged in creating a community of practice with the librarians involved in services to older adults.	SD	D	A	SA
12.14 Other:	SD	D	A	SA
12.15 Other:	SD	D	A	SA

Comments:

13. Do you track any of the following **outcomes** for your LAL program? (Please check all that apply)

- 13.1 Number of services and programs for older adults
- 13.2 Older adults' satisfaction with services and programs
- 13.3 Number of older adults using the library as a meeting space
- 13.4 Number of older adults involved in programming decisions
- 13.5 Number of older adults volunteering in the library
- 13.6 Number of older adults involved in intergenerational programs
- 13.7 Number of older adults involved in multicultural programs
- 13.8 Number of older adults accessing the library resources
- 13.9 Number of older adults working in the library
- 13.10 Number of librarians within your library working on the LAL innovations
- 13.11 Number of librarians outside of your library working on the LAL innovations
- 13.12 Number of community organizations working with the librarians on LAL innovations
- 13.13 Other: (Please specify)

14. Following is a list of the topics presented at the Institute. Please circle the number that indicates how **useful** the information provided has been for you.

Please circle only one answer for each item.

	Not at all useful	A little useful	Somewhat useful	Very useful
14.1 Trends and issues in aging	1	2	3	4
14.2 Needs of a diverse cultural community	1	2	3	4
14.3 Principles of intergenerational programming	1	2	3	4
14.4 Characteristics and needs of the lifelong learner	1	2	3	4
14.5 Partnerships and collaborations	1	2	3	4
14.6 Boomer expectations about post-retirement employment and civic engagement	1	2	3	4
14.7 Health and aging	1	2	3	4
14.8 How to access information resources on aging	1	2	3	4
14.9 How to implement lifelong access library initiatives	1	2	3	4
14.10 How to evaluate library services	1	2	3	4
14.11 Assets and needs assessments	1	2	3	4
14.12 How to identify program outcomes	1	2	3	4
14.13 How to identify methods for data collection	1	2	3	4
14.14 How to identify resources on logic models	1	2	3	4

15. Please list any other topics that you think should be added for the 2008 Institute:

16. Since the Institute, have you accessed the **Lifelong Access Libraries™** website (www.lifelonglibraries.org)?

YES

NO (SKIP to Question # 17)

17. If yes, how often do you access the website? _____ times per month.

18. Please comment on how the website could be improved.

19. Since the Institute, have you used the Lifelong Access Libraries Leadership Institute notebook you received at the Institute?

YES

NO (SKIP to Question # 20)

20. If yes, how often do you use the notebook? _____ times per month.

21. Please comment on how the notebook could be improved.

22. How **useful** have you found the following ongoing activities?

Please circle only one answer for each item.

	Not at all useful	A little useful	Somewhat useful	Very useful	Not Used
22.1 Communications from Libraries for the Future (LFF)	1	2	3	4	9
22.2 Communication with other Fellows	1	2	3	4	9
22.3 LAL website	1	2	3	4	9
22.4 Meetings at conferences	1	2	3	4	9
22.5 Lifelong Access Libraries Leadership Notebook	1	2	3	4	9
22.6 LFF Listserv	1	2	3	4	9
22.7 LFF Blog	1	2	3	4	9
22.8 LFF Monthly Newsletter	1	2	3	4	9
22.9 Other:	1	2	3	4	9
22.10 Other:	1	2	3	4	9

23. Please comment on any additional support from Libraries for the Future that you think would be helpful.

24. Other comments:

Thank you for completing the survey!

Please return the survey in the postage prepaid envelope or to:

Joanne Gard Marshall

Lifelong Access Libraries Institute Evaluation