

# Lifelong Access

L I B R A R I E S

Redefining public library services to older adults

## Leadership Institute 2008 Preliminary Report

February

# 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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## **2008 Lifelong Access Libraries Leadership Institute Preliminary Report**

**February 2009**

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## Background

The School of Information and Library Science and the UNC Institute on Aging received four contracts from the Libraries for the Future (LFF). The first contract involved evaluating up to five Centers of Excellence and Innovation in Lifelong Access Libraries between 2006 and 2008. To date, visits have been made to the three initial Centers of Excellence and Innovation identified by LFF. The evaluation of the Centers is taking 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 visits were conducted at Phoenix Public Library (June 18-19, 2007), Allegheny County Library Association (August 27-28, 2007) and New Haven Free Public Library (December 13-14, 2007). Key informant interviews were done with library staff and community collaborators and focus groups were conducted with library staff and library users. Interviews and focus groups from the visits have been transcribed and coded for themes. NVivo 7.0 is being used for thematic analysis. A preliminary synthesis report on the three Centers is forthcoming. The remaining two Centers have been identified by LFF: Northeastern Regional Massachusetts Library System and North Carolina Collaboration on Lifelong Learning and Engagement. Data collection process has been planned and the UNC team is awaiting approval from LFF on the modified evaluation subcontract.

The second contract was for an evaluation of the first national Lifelong Access Libraries Institute held in Chapel Hill, NC from July 30-August 4, 2006. The full report of the 2006 Institute evaluation was submitted to LFF in November 2006.

In March 2007, UNC received another contract to evaluate the 2007 Lifelong Access Libraries Institute held in Chapel Hill, NC from July 29-August 3, 2007. This contract also included a separate payment for local planning support. A preliminary report of the 2007 Institute results with a comparison to the 2006 findings was submitted to LFF in August 2007. The full report of the 2007 institute evaluation was submitted to LFF in October 2008.

A fourth contract was awarded to UNC to evaluate the 2008 Lifelong Access Libraries Institute held in Chapel Hill, NC from July 27-30, 2008.

The following report, submitted in November 2008, consists of the on-site evaluation results from the 2008 Lifelong Access Libraries Institute including a description of the cohort of 2008 Fellows and the evaluation forms used. This report also includes a comparison with 2006 and 2007 Institutes where possible. The six-month follow up survey, the final component of 2008 Institute evaluation, will be mailed to the Fellows in February 2009. The results of this follow-up will be submitted to LFF in summer 2009.

## **Lifelong Access Libraries Institute, 2008 Evaluation Report November 2008**

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 Overall Institute Evaluation forms and Individual Session Evaluation forms.

### **DATA COLLECTION**

#### **Overall Institute Evaluation (2006, 2007 and 2008)**

All attendees had the opportunity to complete an evaluation form to assess their overall experience at the 2006 Institute. Respondents were asked to rate their satisfaction with different aspects of the Institute, as well as to offer suggestions for improving the Institute. Sixteen attendees out of 23 attending (69.6% response rate) completed these surveys. In 2007 and 2008, all attendees had the opportunity to complete the same evaluation form to assess their overall experience at the Institute. In 2007, eighteen attendees out of 19 attending (94.7% response rate) completed these surveys. In 2008, twenty-three attendees (100% response rate) completed the overall institute evaluation. Respondents were comprised of twenty-one Fellows and two observers. A brief comparison of the results of the 2006, 2007 and 2008 Institute Evaluations is included below. Descriptive statistics and significance tests (usually independent samples t-tests) were compiled using SPSS 15.0 and 16.0.

#### **Individual Session Evaluations (2008)**

In 2008, attendees were also given the opportunity to complete individual evaluation surveys for the twenty-one sessions conducted at the Institute<sup>1</sup>. Respondents of the individual session evaluations included the twenty-one Fellows as well as additional observers. These paper and pencil surveys covered attendees' satisfaction with session features, presentation of new knowledge, and suggestions for improvement. There were between 22 and 29 surveys completed per session totaling to 75 session evaluation forms. Descriptive statistics were compiled using SPSS 16.0.

Sessions are indicated in this report by the session numbers in the 2008 Agenda (see Institute Agenda in Appendix 1).

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<sup>1</sup> Due to the differences in the 2006, 2007 and 2008 Institute agendas, comparison of individual sessions between the years is not possible.

## RESULTS

### Overall Institute Evaluation (2006, 2007 and 2008) (See Table A)

Fellows were asked to think about the Institute as a whole and rate their overall experience on several features in both the 2006, 2007 and 2008 evaluation forms.

- All attendees were generally satisfied with the Institute all three years (Question 1.1).
- Comparing 2006, 2007 and 2008, there was an increase in satisfaction with the application process (Question 1.11) and with communications prior to the Institute (Question 1.12).
- From 2006 to 2007, we see a decline in satisfaction with the number of presentations (Question 1.3). The number of presentations increased from 23 in 2006 to 29 in 2007. The 2007 Fellows felt overwhelmed by the number of sessions and wanted more time to reflect on the session information. In 2008, the Institute was condensed into three days with 21 sessions (7 sessions per day). From 2007 to 2008, satisfaction with the number of presentations increased, which might be attributed to the shorter length of the Institute and number of sessions. Although satisfaction increased, the 2008 Fellows indicated that the amount of information covered was a lot to take in during a relatively short period of time, and a few respondents indicated that they would like to see a return to a longer institute.
- There was also a decline in satisfaction with the number of networking opportunities (Question 1.5) from 2006 to 2007 and 2008. In 2008, attendees reported few opportunities to network at the Institute and commented that the Institute “seems to be somewhat cliquey” and that more time needs to be built in “for sharing and processing with each other”. Several respondents noted that they wanted more interactivity during sessions, and that this could be a means of promoting networking. Conversely, one participant stated, “The networking was inspirational, informative, and useful,” which is an indication that networking opportunities were available and beneficial given the structure of the Institute.
- The number of Fellows rating the opportunities for hands on learning (Question 1.4) as excellent or good increased from 33% in 2006 to 58% in 2007 and then decreased to 52% in 2008. However, respondents noted that the third day of the 2008 Institute offered more interaction, group activity, and sharing.
- In 2008, satisfaction with Programming quality (Question 1.2), Meals (Question 1.9), and Chapel Hill as a meeting place (Question 1.10) decreased slightly from the previous years.
- There was an increase in satisfaction with Printed information provided (Question 1.6), Meeting facilities (Question 1.7), and Accommodations (Question 1.8) in 2008 from the previous year.

**Table A: Overall Institute Ratings**

		<b>2006 Institute (n=16) Excellent or Good</b>	<b>2007 Institute (n=18) Excellent or Good</b>	<b>2008 Institute (n=23) Excellent or Good</b>
<b>1.1</b>	<b>Overall satisfaction</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>1.2</b>	<b>Programming quality</b>	<b>100.0%</b>	<b>100.0%</b>	<b>95.7%</b>
<b>1.3</b>	<b>Number of presentations</b>	<b>80.0%</b>	<b>62.5%</b>	<b>78.3%</b>
<b>1.4</b>	<b>Number of opportunities for hands on learning</b>	<b>33.3</b>	<b>58.8%</b>	<b>52.2%</b>
<b>1.5</b>	<b>Number of networking opportunities</b>	<b>87.5%</b>	<b>76.5%</b>	<b>73.9%</b>
<b>1.6</b>	<b>Printed information provided</b>	<b>100.0%</b>	<b>93.8%</b>	<b>95.7%</b>
<b>1.7</b>	<b>Meeting facilities</b>	<b>100.0%</b>	<b>88.9%</b>	<b>100.0%</b>
<b>1.8</b>	<b>Accommodations</b>	<b>100.0%</b>	<b>94.4%</b>	<b>100.0%</b>
<b>1.9</b>	<b>Meals</b>	<b>100.0%</b>	<b>100.0%</b>	<b>95.7%</b>
<b>1.10</b>	<b>Chapel Hill as a meeting place</b>	<b>100.0%</b>	<b>100.0%</b>	<b>95.7%</b>
<b>1.11</b>	<b>Application process</b>	<b>66.7%</b>	<b>94.1%</b>	<b>95.5%</b>
<b>1.12</b>	<b>Communication prior to the Institute</b>	<b>50.0%</b>	<b>76.5%</b>	<b>82.6%</b>
<b>1.13</b>	<b>Helpfulness of staff during the Institute</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

## **Qualitative Comments on Overall Institute (2008)**

The following section summarizes the notes about the overall experience at the Institute. Feedback was gathered from the individual session and overall Institute evaluation forms.

### **Time Management**

- Respondents noted that several sessions started late. This was partly a consequence of morning sessions not beginning on time as well as presenters running over their allotted time. One attendee suggested that coordinators take a more assertive role in keeping sessions to their prearranged time so that the Institute's schedule is adhered to in a more streamline manner.
- Several attendees noted the need for more breaks throughout the day and wanted several break periods incorporated into the Institute's daily agenda.
- Respondents indicated that there were too many presentations each day and that this did not allow enough time for questions and answers, discussion among peers, and time to disseminate information.

### **Overwhelmed/Too Much Information**

- Many respondents felt that the large number of sessions each day had a negative effect on their overall experience because they did not have enough time to process the information being presented and that it was "almost to the point of overstimulation."
- Attendees noted that they may have felt less overwhelmed by the amount of information presented if they had more time for processing following presentations.

### **Lack of Fellowship Development/Networking Opportunities**

- While a few attendees noted that the Institute provided them with networking opportunities, several mentioned that they would have liked for the Institute to have better facilitated networking.
- Fellows voiced an interest in having more opportunities for one-on-one interactions with coordinators.
- Respondents mentioned that including more time for unstructured interactions with one another would allow for more networking to occur.

### **Handouts**

- Overall, attendees were satisfied with the content of the handouts. However, there were a few complaints about the text being too small on the printouts of PowerPoint presentations.
- Attendees enjoyed receiving the Institute binder which included all of the handouts, but it was mentioned that it would have been helpful to receive the binder prior to the Institute to allow for more preparation.
- One Fellow indicated that it would be helpful to receive the handouts in electronic format.

## **Order of presentations**

- While the order of presentations was responded to with impartiality, it was noted that speakers perceived to be of a higher caliber made subsequent sessions more difficult to attend to. In particular, session (2.2) Redefining Aging: Brain Research was specified as an excellent session and attendees noted that the following sessions had the additional challenge of trying to captivate the audience to the same degree. It may be useful to consider presenters' dynamism when choosing their time slot so participants remain engaged during lethargic times in the day (e.g., after lunch).

## **Technical Problem**

- Respondents noted that technical issues including lights going on and off in the meeting room was distracting.
- Attendees recommended the enforced use of microphones during presentations so that everyone could hear.

## **Burden of Evaluation Documents**

- Respondents noted that while they understood the need for evaluations, it was a little disconcerting to want more time with the presenters and for question and answer periods, but instead need to spend that time filling out evaluations.
- Attendees commented on the academic nature of evaluations and questioned the appropriateness given the audience.

## **Location**

- While attendees responded favorably to Chapel Hill as a location, Fellows travelling from different time zones mentioned difficulty in adjusting to the time change, and suggested that the first day of the Institute begin a little later in the day to allow time to adjust.

## **Individual Session Evaluations (2008)**

Respondents were asked to rate each session in the following areas:

1. Content of presentation
2. Appropriateness of session length
3. Adequacy of time for questions
4. Quality of presentation handouts
5. Whether they acquired new knowledge at the session
6. Whether the session met their expectations
7. Overall satisfaction with the session

Sessions are reported below by their session numbers in the 2008 Agenda (see Appendix 1).

### **1. Content of Presentations (See Table B)**

The majority of attendees were satisfied with the content of all sessions.

- Most sessions were rated as excellent or good by attendees.
- The following sessions received ratings of excellent or good by all respondents:
  - (1.3) When Lifelong Learning Becomes Active Wisdom
  - (2.1) “When I’m 64” – Older Adults and Boomers Getting Healthy
  - (2.2) Redefining Aging: Brain Research
  - (3.1) Work After 50: Purpose and Necessity
  - (3.2) The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs
  - (3.5) Stories from the Field: Leadership and Innovation
- The content of (1.5) Learning Across the Lifespan, (2.3) Health and Diversity, and (3.4) Discussion: What does it mean to be a Lifelong Access Fellow? were rated as average, fair, or poor by more than fifteen percent of respondents. Several attendees commented on wanting more concrete examples of successful programs within the content materials.

**Table B: Session Evaluation: Content (percent)**

	Excellent or Good	Average	Fair or Poor
1.1 Longevity from a Humanistic Perspective (n=23)	95.7	4.3	0.0
1.2 Understanding Boomers: A Demographic Overview (n=23)	91.3	8.7	0.0
1.3 When Lifelong Learning Becomes Active Wisdom (n=23)	100.0	0.0	0.0
1.4 Panel Discussion Q &A: Boomers and Libraries: Why Now? (n=23)	91.3	4.3	4.3
1.5 Learning Across the Lifespan (n=22)	81.8	9.1	9.1
1.6 Civic Engagement: A Critical Perspective (n=23)	91.3	4.3	4.3
1.7 Interactive Exercise (n=21)	85.7	9.5	4.8
2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy (n=24)	100.0	0.0	0.0
2.2 Redefining Aging: Brain Research (n=24)	100.0	0.0	0.0
2.3 Health and Diversity (n=24)	83.3	12.5	4.2
2.4 Consumer Health: Implications for Public Libraries (n=7)	85.7	14.3	0.0
2.5 Leading Library Innovation (n=22)	95.5	4.5	0.0
2.6 Stories from the Field: Programs, Partnerships, and Marketing (n=24)	91.7	8.3	0.0
2.7 Lifelong Access: Framework for Converting Theory to Practice (n=22)	86.4	13.6	0.0
3.1 Work After 50: Purpose and Necessity (n=22)	100.0	0.0	0.0
3.2 The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs (n=22)	100.0	0.0	0.0
3.3 Building Creative Partnerships (n=21)	85.7	9.5	4.8
3.4 Discussion: What does it mean to be a Lifelong Access Fellow? (n=17)	82.4	17.6	0.0
3.5 Stories from the Field: Leadership and Innovation (n=19)	100.0	0.0	0.0
3.6 Creating an Action Plan (n=16)	87.5	12.5	0.0
3.7 Evaluations (n=9)	88.9	0.0	11.1

## 2. Length of Session Time (See Table C)

Respondents were asked to rate the appropriateness of length of time per session.

- In general, length of session time was considered good or excellent by the majority of respondents.
- The following sessions received universal ratings of excellent or good:
  - (2.2) Redefining Aging: Brain Research
  - (3.2) The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs
- More than half of respondents (65.2%) rated the length of session (1.5) Learning Across the Lifespan as average, fair or poor. Attendees commented that this session was too short and that there was not enough time for discussion. One response reads “[Eleanor Drago-Severson] was the wrong [presenter] to cut short. The information she was providing was one of the core nuggets of the Institute.” Several other attendees echoed these sentiments and expressed that the presenter had very valuable information to share with the audience, but that there was not enough time to get through it all.
- Other sessions that more than twenty percent of respondents rated as average, fair, or poor include:
  - (1.3) When Lifelong Learning Becomes Active Wisdom
  - (1.4) Panel Discussion Q &A: Boomers and Libraries: Why Now?
  - (1.7) Interactive Exercise
  - (2.7) Lifelong Access: Framework for Converting Theory to Practice
  - (3.4) Discussion: What does it mean to be a Lifelong Access Fellow?
  - (3.7) Evaluations
- For the sessions mentioned above, attendees noted that these sessions contained important information, but that there was not enough time.
- One attendee summed up the effect of having so many sessions during a day as follows, “After a second jam-packed day full of great speakers and presentations I feel I am overloaded and overwhelmed. I would feel I am able to absorb more if we had a longer lunch break with the opportunity to eat, go for a walk, see an exhibit and feel ready for the afternoon.”

**Table C: Session Evaluation: Length of Session (percent)**

	Excellent or Good	Average	Fair or Poor
1.1 Longevity from a Humanistic Perspective (n=22)	90.9	9.1	0.0
1.2 Understanding Boomers: A Demographic Overview (n=23)	91.3	8.7	0.0
1.3 When Lifelong Learning Becomes Active Wisdom (n=23)	78.3	21.7	0.0
1.4 Panel Discussion Q &A: Boomers and Libraries: Why Now? (n=23)	60.9	30.4	8.7
1.5 Learning Across the Lifespan (n=23)	34.8	17.4	47.8
1.6 Civic Engagement: A Critical Perspective (n=22)	90.9	4.5	4.5
1.7 Interactive Exercise (n=21)	71.4	19.0	9.5
2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy (n=24)	91.7	8.3	0.0
2.2 Redefining Aging: Brain Research (n=24)	100.0	0.0	0.0
2.3 Health and Diversity (n=23)	87.0	8.7	4.3
2.4 Consumer Health: Implications for Public Libraries (n=11)	85.7	14.3	0.0
2.5 Leading Library Innovation (n=22)	90.9	9.1	0.0
2.6 Stories from the Field: Programs, Partnerships, and Marketing (n=24)	83.3	16.7	0.0
2.7 Lifelong Access: Framework for Converting Theory to Practice (n=22)	77.3	13.6	9.1
3.1 Work After 50: Purpose and Necessity (n=22)	90.9	4.5	4.5
3.2 The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs (n=22)	100.0	0.0	0.0
3.3 Building Creative Partnerships (n=21)	85.7	9.5	4.8
3.4 Discussion: What does it mean to be a Lifelong Access Fellow? (n=17)	64.7	35.3	0.0
3.5 Stories from the Field: Leadership and Innovation (n=19)	94.7	5.3	0.0
3.6 Creating an Action Plan (n=16)	93.8	6.2	0.0
3.7 Evaluations (n=9)	66.7	22.2	11.1

### 3. Time for Questions (See Table D)

Attendees were asked whether the time for questions was sufficient. The satisfaction with the amount of time allowed for questions varied by session.

- Sessions where seventy-five percent or more of respondents rated time for questions as excellent or good include:
  - (2.1) “When I’m 64” – Older Adults and Boomers Getting Healthy
  - (2.2) Redefining Aging: Brain Research
  - (2.3) Health and Diversity
  - (2.4) Consumer Health: Implications for Public Libraries
  - (2.5) Leading Library Innovation
  - (2.6) Stories from the Field: Programs, Partnerships, and Marketing
  - (3.2) The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs
  - (3.3) Building Career Partnerships
  - (3.5) Stories from the Field: Leadership and Innovation
  - (3.6) Creating an Action Plan
  
- Fifty percent or more of respondents rated time for questions during the following sessions as average, fair or poor:
  - (1.2) Understanding Boomers: A Demographic Overview
  - (1.4) Panel Discussion Q & A: Boomers and Libraries: Why Now?
  - (1.5) Learning Across the Lifespan
  - (1.6) Civic Engagement: A Critical Perspective
  - (1.7) Interactive Exercise
  - (3.7) Evaluations
  
- In general, participants felt that there was more time for questions on the second and third days of the Institute. The first day of the Institute was strongly felt to be lacking in time for questions.

**Table D: Session Evaluation: Time for Questions (percent)**

	Excellent or Good	Average	Fair or Poor
1.1 Longevity from a Humanistic Perspective (n=7)	57.1	28.6	14.3
1.2 Understanding Boomers: A Demographic Overview (n=10)	50.0	40.0	10.0
1.3 When Lifelong Learning Becomes Active Wisdom (n=9)	66.7	22.2	11.1
1.4 Panel Discussion Q &A: Boomers and Libraries: Why Now? (n=21)	47.6	28.6	23.8
1.5 Learning Across the Lifespan (n=12)	25.0	8.3	66.7
1.6 Civic Engagement: A Critical Perspective (n=12)	41.7	25.0	33.3
1.7 Interactive Exercise (n=14)	42.9	35.7	21.4
2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy (n=22)	81.8	18.2	0.0
2.2 Redefining Aging: Brain Research (n=22)	81.8	18.2	0.0
2.3 Health and Diversity (n=22)	77.3	18.2	4.5
2.4 Consumer Health: Implications for Public Libraries (n=7)	85.7	14.3	0.0
2.5 Leading Library Innovation (n=20)	75.0	20.0	5.0
2.6 Stories from the Field: Programs, Partnerships, and Marketing (n=20)	80.0	20.0	0.0
2.7 Lifelong Access: Framework for Converting Theory to Practice (n=20)	70.0	30.0	0.0
3.1 Work After 50: Purpose and Necessity (n=19)	73.7	21.0	5.3
3.2 The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs (n=20)	85.0	15.0	0.0
3.3 Building Creative Partnerships (n=19)	79.0	10.5	10.5
3.4 Discussion: What does it mean to be a Lifelong Access Fellow? (n=15)	73.3	20.0	6.7
3.5 Stories from the Field: Leadership and Innovation (n=18)	83.3	16.7	0.0
3.6 Creating an Action Plan (n=12)	83.3	16.7	0.0
3.7 Evaluations (n=6)	50.0	33.3	16.7

#### 4. Presentation Handouts (See Table E)

Attendees reported their satisfaction with presentation handouts and the rating of the handouts varied by session.

- In general, attendees were very satisfied with the presentation handouts.
- All respondents rated the following session handouts as excellent or good:
  - (1.2) Longevity from a Humanistic Perspective
  - (2.1) “When I’m 64” – Older Adults and Boomers Getting Healthy
  - (2.4) Consumer Health: Implications for Public Libraries
  - (3.7) Evaluations
- Satisfaction with the handouts was expressed in some of the following statements:
  - “I am very grateful for the handouts as I found all the graphs extremely interesting”
  - “[The] written material (paper) included in binder is very interesting”
  - “I will use their handouts to share with staff strategies and connections”
  - “[The] handouts will be very useful in applying all this”
- With regards to PowerPoint slide handouts, attendees stated preference for three slides per page (versus six) because the text and graphs were larger and thus easier to read.
- For three sessions, fifteen percent or more of respondents rated the handouts as average, fair or poor:
  - (1.5) Learning Across the Lifespan
  - (1.7) Interactive Exercise
  - (3.3) Building Creative Partnerships
- Attendees noted that while they appreciated the handouts, some of the presenters did not explain the materials associated with the session, which was most likely due to time constraints. In the future, it may be helpful to request that presenters spend a few minutes explaining the handouts they have provided and their pertinence to the Institute.
- It was indicated that it would be helpful to have handouts sent to attendees prior to the Institute, “It would have helped if I had read the handouts before hand since the topic is complex.” Providing handouts to Fellows prior to the Institute could help better prepare them for sessions. Sending electronic copies of articles they are encouraged to read is a good option and should be considered for future Institutes.

**Table E: Session Evaluation: Presentation Handouts (percent)**

	Excellent or Good	Average	Fair or Poor
1.1 Longevity from a Humanistic Perspective (n=14)	100.0	0.0	0.0
1.2 Understanding Boomers: A Demographic Overview (n=16)	87.5	12.5	0.0
1.3 When Lifelong Learning Becomes Active Wisdom (n=12)	91.7	8.3	0.0
1.4 Panel Discussion Q &A: Boomers and Libraries: Why Now? (n=7)	85.7	0.0	14.3
1.5 Learning Across the Lifespan (n=19)	84.2	10.5	5.3
1.6 Civic Engagement: A Critical Perspective (n=18)	88.9	11.1	0.0
1.7 Interactive Exercise (n=4)	75.0	25.0	0.0
2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy (n=22)	100.0	0.0	0.0
2.2 Redefining Aging: Brain Research (n=23)	95.7	4.3	0.0
2.3 Health and Diversity (n=19)	89.5	0.0	10.5
2.4 Consumer Health: Implications for Public Libraries (n=4)	100.0	0.0	0.0
2.5 Leading Library Innovation (n=19)	89.5	10.5	0.0
2.6 Stories from the Field: Programs, Partnerships, and Marketing (n=23)	91.3	8.7	0.0
2.7 Lifelong Access: Framework for Converting Theory to Practice (n=21)	90.5	9.5	0.0
3.1 Work After 50: Purpose and Necessity (n=21)	95.2	4.8	0.0
3.2 The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs (n=20)	90.0	5.0	5.0
3.3 Building Creative Partnerships (n=20)	85.0	5.0	10.0
3.4 Discussion: What does it mean to be a Lifelong Access Fellow? (n=7)	85.7	14.3	0.0
3.5 Stories from the Field: Leadership and Innovation (n=16)	87.5	12.5	0.0
3.6 Creating an Action Plan (n=13)	92.3	7.7	0.0
3.7 Evaluations (n=6)	100.0	0.0	0.0

## 5. Gained New Information (See Table F)

Respondents were asked whether they gained any new information or insight on the topic from the sessions.

- Overall, the majority of attendees reported that they had gained new information in each session.
- All respondents noted gaining new information from the following sessions:
  - (1.1) Longevity from a Humanistic Perspective
  - (1.5) Learning Across the Lifespan
  - (1.6) Civic Engagement: A Critical Perspective
  - (2.2) Redefining Aging: Brain Research
  - (3.2) The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs
  - (3.4) Discussion: What does it mean to be a Lifelong Access Fellow?
- In two sessions, twenty-five percent or more respondents reported not gaining any new information or insight on the topic. These two sessions were: (1.7) Interactive Exercise: A Critical Perspective and (3.7) Evaluations.
- Additionally, one fifth of attendees reported not gaining new information from (1.2) Understanding Boomers: A Demographic Overview, (2.7) Lifelong Access: Framework for Converting Theory to Practice and (3.6) Creating an Action Plan.

**Table F: Session Evaluation: Gained new information (percent)**

	Agree
1.1 Longevity from a Humanistic Perspective (n=23)	100.0
1.2 Understanding Boomers: A Demographic Overview (n=22)	77.3
1.3 When Lifelong Learning Becomes Active Wisdom (n=22)	95.5
1.4 Panel Discussion Q & A: Boomers and Libraries: Why Now? (n=21)	85.7
1.5 Learning Across the Lifespan (n=18)	100.0
1.6 Civic Engagement: A Critical Perspective (n=19)	100.0
1.7 Interactive Exercise (n=20)	75.0
2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy (n=23)	95.7
2.2 Redefining Aging: Brain Research (n=22)	100.0
2.3 Health and Diversity (n=21)	85.7
2.4 Consumer Health: Implications for Public Libraries (n=6)	83.3
2.5 Leading Library Innovation (n=20)	90.0
2.6 Stories from the Field: Programs, Partnerships, and Marketing (n=22)	95.5
2.7 Lifelong Access: Framework for Converting Theory to Practice (n=20)	80.0
3.1 Work After 50: Purpose and Necessity (n=20)	95.0
3.2 The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs (n=20)	100.0
3.3 Building Creative Partnerships (n=19)	94.7
3.4 Discussion: What does it mean to be a Lifelong Access Fellow? (n=14)	100.0
3.5 Stories from the Field: Leadership and Innovation (n=16)	93.8
3.6 Creating an Action Plan (n=16)	81.2
3.7 Evaluations (n=7)	71.4

## 6. Expectations (See Table G)

- For all of the sessions, sixty percent or more of respondents reported that the session met their expectations.
- All Fellows felt the following sessions met their expectations:
  - (2.2) Redefining Aging: Brain Research
  - (2.5) Leading Library Innovation
  - (2.6) Stories from the Field: Programs, Partnerships, and Marketing
  - (3.1) Work After 50: Purpose and Necessity
  - (3.2) The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs
  - (3.5) Stories from the Field: Leadership and Innovation
- Only three sessions met fewer than twenty percent of the participants' expectations. These sessions were:
  - (1.4) Panel Discussion Q & A: Boomers and Libraries: Why Now?
  - (1.5) Learning Across the Lifespan
  - (2.4) Consumer Health: Implications for Public Libraries
- Many respondents noted that sessions (2.2) Redefining Aging: Brain Research exceeded their expectations.
- Several participants expressed that they would have liked to hear more about programs that have been successfully implemented (e.g., successful volunteer programs in action), so that they could have a more “real world” perspective along with a concrete example to model after.

**Table G: Session Evaluation: Expectations (percent)**

	Agree
<b>1.1 Longevity from a Humanistic Perspective (n=20)</b>	<b>95.0</b>
<b>1.2 Understanding Boomers: A Demographic Overview (n=23)</b>	<b>91.3</b>
<b>1.3 When Lifelong Learning Becomes Active Wisdom (n=23)</b>	<b>91.3</b>
<b>1.4 Panel Discussion Q &amp;A: Boomers and Libraries: Why Now? (n=21)</b>	<b>81.0</b>
<b>1.5 Learning Across the Lifespan (n=18)</b>	<b>61.1</b>
<b>1.6 Civic Engagement: A Critical Perspective (n=21)</b>	<b>85.7</b>
<b>1.7 Interactive Exercise (n=19)</b>	<b>84.2</b>
<b>2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy (n=23)</b>	<b>95.7</b>
<b>2.2 Redefining Aging: Brain Research (n=22)</b>	<b>100.0</b>
<b>2.3 Health and Diversity (n=22)</b>	<b>86.4</b>
<b>2.4 Consumer Health: Implications for Public Libraries (n=5)</b>	<b>80.0</b>
<b>2.5 Leading Library Innovation (n=18)</b>	<b>100.0</b>
<b>2.6 Stories from the Field: Programs, Partnerships, and Marketing (n=22)</b>	<b>100.0</b>
<b>2.7 Lifelong Access: Framework for Converting Theory to Practice (n=19)</b>	<b>89.5</b>
<b>3.1 Work After 50: Purpose and Necessity (n=20)</b>	<b>100.0</b>
<b>3.2 The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs (n=19)</b>	<b>100.0</b>
<b>3.3 Building Creative Partnerships (n=19)</b>	<b>94.7</b>
<b>3.4 Discussion: What does it mean to be a Lifelong Access Fellow? (n=13)</b>	<b>92.3</b>
<b>3.5 Stories from the Field: Leadership and Innovation (n=16)</b>	<b>100.0</b>
<b>3.6 Creating an Action Plan (n=15)</b>	<b>93.3</b>
<b>3.7 Evaluations (n=7)</b>	<b>85.7</b>

## 7. Overall Satisfaction (See Table H)

Attendees also rated their satisfaction with individual sessions. The majority of respondents rated their overall satisfaction with all the sessions as good or excellent.

- For the majority of sessions, more than seventy-five percent of respondents rated the session as good or excellent in overall satisfaction.
- For the following sessions, all participants rated the session as excellent or good.
  - (2.1) “When I’m 64” – Older Adults and Boomers Getting Healthy
  - (2.2) Redefining Aging: Brain Research
  - (3.1) Work After 50: Purpose and Necessity
  - (3.2) The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs
  - (3.5) Stories from the Field: Leadership and Innovation
- Only one session, (1.5) Learning Across the Lifespan, was rated by less than sixty percent of respondents as average, fair or poor.
- Additionally, five sessions receiving less than eighty-five percent endorsement were:
  - (1.2) Understanding Boomers: A Demographic Overview
  - (1.7) Interactive Exercise
  - (2.3) Health and Diversity
  - (2.7) Lifelong Access: Framework for Converting Theory to Practice
  - (3.4) Discussion: What does it mean to be a Lifelong Access Fellow?
- For these five sessions, respondents cited various issues, including noise from outside, the applicability of the subject matter, redundancy, and not enough time, as their chief complaints.

**Table H: Session Evaluation: Overall Satisfaction (percent)**

	Excellent or Good	Average	Fair or Poor
1.1 Longevity from a Humanistic Perspective (n=23)	95.7	4.3	0.0
1.2 Understanding Boomers: A Demographic Overview (n=23)	82.6	17.4	0.0
1.3 When Lifelong Learning Becomes Active Wisdom (n=23)	95.7	4.3	0.0
1.4 Panel Discussion Q &A: Boomers and Libraries: Why Now? (n=23)	87.0	8.7	4.3
1.5 Learning Across the Lifespan (n=22)	59.1	18.2	22.7
1.6 Civic Engagement: A Critical Perspective (n=22)	86.4	13.6	0.0
1.7 Interactive Exercise (n=21)	81.0	14.3	4.8
2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy (n=24)	100.0	0.0	0.0
2.2 Redefining Aging: Brain Research (n=24)	100.0	0.0	0.0
2.3 Health and Diversity (n=24)	83.3	0.0	16.7
2.4 Consumer Health: Implications for Public Libraries (n=7)	85.7	14.3	0.0
2.5 Leading Library Innovation (n=22)	95.5	4.5	0.0
2.6 Stories from the Field: Programs, Partnerships, and Marketing (n=24)	87.5	12.5	0.0
2.7 Lifelong Access: Framework for Converting Theory to Practice (n=22)	81.8	18.2	0.0
3.1 Work After 50: Purpose and Necessity (n=22)	100.0	0.0	0.0
3.2 The Five Patrons You Meet in Retirement: Post Career Life Models and Information and Learning Needs (n=22)	100.0	0.0	0.0
3.3 Building Creative Partnerships (n=21)	90.5	4.8	4.8
3.4 Discussion: What does it mean to be a Lifelong Access Fellow? (n=17)	82.4	17.6	0.0
3.5 Stories from the Field: Leadership and Innovation (n=19)	100.0	0.0	0.0
3.6 Creating an Action Plan (n=17)	88.2	11.8	0.0
3.7 Evaluations (n=9)	77.8	11.1	11.1

## **8. Qualitative Comments on Sessions**

### **1.1 Keynote: Longevity from a Humanistic Perspective. Harry (Rick) Moody**

- Attendees' overall response indicated that they would have liked this presentation to last longer because they thoroughly enjoyed the content and found it to be beneficial.
- It was noted that attendees would have liked an overview of the presentation and the speaker's overall intent at the beginning of the talk in order to better comprehend the information.

### **1.2 Understanding Boomers: A Demographic Overview. Victor Marshall**

- Attendees appreciated the content of the presentation and felt they had a greater understanding of the demographic information without being overwhelmed with statistics. The fine balance between too much information and not enough was met as only a few attendees responded that they would have appreciated more demographic information pertaining to aging adults and no one reported that they were beset by the numbers.
- Noise and not enough time were the chief complaints of this session and may have discouraged a complete command of the information presented. Several attendees dealt with this by continuing discussion of the content of the presentation during their lunch break.

### **1.3 When Lifelong Learning Becomes Active Wisdom. Mary Catherine Bateson**

- Respondents gave very positive feedback of this presentation and many indicated that they would have liked to have heard more from Ms. Bateson. The only criticism was that the charts and diagrams in the handout were not explained clearly enough.

### **1.4 Panel Discussion Q &A: Boomers and Libraries: Why Now? Stephen Ristau**

- Attendees complained that this session was not long enough and that more structure would have been useful.
- More time was wanted to interact and socialize with speakers.

### **1.5 Learning Across the Lifespan. Eleanor Drago-Severson**

- Respondents indicated that time was a constraint during this presentation – that too much information was being presented during the allotted time slot, which made the presentation seemed rushed. It was thus difficult to absorb concepts and ideas and attendees responded that this impaired their ability to make the connection between theory and practice.

## **1.6 Civic Engagement: A Critical Perspective. Sabrina Reilly, Jill Friedman Fixler, and Stephen Ristau**

- Attendees identified time constraints as being an issue during this session. They were left with a number of questions and did not feel there was adequate time to discuss what it brought up for them. Responses were varied from Fellows as some were ready to take what they learned and put it into practice right away whereas others were left somewhat confounded by the material and needed further explanation.

## **1.7 Interactive Exercise. Hagar Shirman**

- Attendees appreciated having time to hear from one another and the ability to discuss the material that was covered throughout the day. Some responses indicated fatigue at this point in the day and there was less feedback for this session than others which could indicate that individuals elected to leave early.

## **2.1 “When I’m 64” – Older Adults and Boomers Getting Healthy. Mary Altpeter**

- Overall, attendees enjoyed the information presented in this session and mentioned gaining a greater perspective of the role libraries can play in the health care arena. Responses indicated that the information provided could be the basis for their library’s future programming initiatives.

## **2.2 Redefining Aging: Brain Research. Paul Nussbaum**

- The audience was enthralled with Dr. Nussbaum’s presentation and several attendees stated that it exceeded their expectations. Attendees were fascinated with the ideas he presented surrounding brain health and felt that the information was both understandable and accessible.

## **2.3 Health and Diversity. Debra Barksdale**

- Attendees’ responses indicated mixed reactions to this session. Several respondents mentioned that while the content of the session was a useful reminder, they were not receiving new messages. Criticisms included the disjointed nature of the presentation, the racial focus of the material, and that it was not applicable. Overall, respondents indicated that they enjoyed the session and appreciated the “personal,” “engaging” and “insightful” qualities of the presenter.

## **2.4 Consumer Health: Implications for Public Libraries. Suzanne Flint**

- Due to time constraints, this session became optional and informally took place during the lunch break. Those that participated enjoyed having the opportunity for conversation at lunch, but noted that there was not enough time to fully address the issues which some attendees were anticipating.

## **2.5 Leading Library Innovation. Mark Winston**

- Again, there were conflicted reactions among respondents with relation to this session. In general, attendees found value in the written materials, but had some difficulty following the presentation and wanted the concepts presented at a deeper level.
- Respondents also cited time constraints as a problem as they wanted to spend more time on this subject, and further develop the leadership and managerial skills needed to implement change within their library setting.

## **2.6 Stories from the Field: Programs, Partnerships, and Marketing. Abigail Elder, Jane Salisbury, Mary Campbell, and Selma Thomas**

- While many attendees enjoyed listening to what other fellows have been doing in the field, responses indicated that several attendees did not feel that this was an integral part of the program and that the time could be more advantageously used to lengthen other presentations.
- Complaints were that the stories were not focused enough on specific examples of how Fellows were able to take the skills acquired to meet the expectations of the institute and there were not enough handouts, which was perceived as a lack of preparation and organization.

## **2.7 Lifelong Access: Framework for Converting Theory to Practice. Hagar Shirman**

- Respondents had mostly positive feedback for this session. Several participants noted that a different time slot would have been beneficial for this presentation (i.e., in the morning instead of the end of the day). It was also suggested that the content of this session was redundant for Fellows, especially for those that are veterans in the field.

## **3.1 Work After 50: Purpose and Necessity. Judy Goggin, Iowaka Barber, Stephen Ristau**

- Attendees mentioned learning a lot from this session; specific information about programs, examples, and collaboration opportunities were listed as some of the highlights.
- As for many of the sessions, not enough time was listed as the chief complaint.

## **3.2 The Five Patrons You Meet in Retirement: Post-Career Life Models and Information and Learning Needs. Ron Manheimer**

- Attendees particularly enjoyed the discussion section of this session and felt that the content was geared towards library programs and cemented concepts.
- Several respondents noted an absence in copies of the PowerPoint slides and mentioned that they would have appreciated having a set in their binder.

### **3.3 Building Creative Partnerships. Susan Perlstein**

- Respondents seemed to be strongly split into two mindsets for this session – they either really enjoyed it or felt uncomfortable because they likened the experience to group therapy.
- Attendees mentioned wanting greater direction during the exercises and that time ran short. Other participants felt that the session was “a breath of fresh air,” enjoyed the physical movement, and appreciated the creativity of the presenter.

### **3.4 Discussion: What does it mean to be a Lifelong Access Fellow? Diantha Dow Schull, Joanne Marshall, and Stephen Ristau**

- Attendees would have liked for this session to have run longer and to have had more time for discussion.
- Fellows liked the idea of a group session and encouraged it to be repeated in subsequent Institutes. The energetic and enthusiastic characteristics of the presenters were also favorably commented on.

### **3.5 Stories from the Field: Leadership and Innovation. Suzanne Flint and Kathy Graybeal**

- While most Fellows commented in a similar vein towards this session with statements such as, “inspirational,” “interesting,” “helpful,” and “impressive” there were a few respondents who did not feel that the information was relevant to the community they serve.

### **3.6 Creating and Action Plan. Hagar Shirman and Stephen Ristau**

- Fellows responded positively to the exercises that were completed during this session, which they found to be “important,” “valuable” and “a lot of fun.”
- A few respondents made suggestions to not focus on a specific group, but to work on an individual message.

### **3.7 Evaluations. Joanne Marshall**

- Fellows found a lot of value in this session and were appreciative of the assistance and information that was presented.
- Respondents noted that the session length was too short and that it would have been useful to hold this session earlier in the day before many of the Fellows had departed the Institute.

## Conclusion

Overall, the 2006, 2007, and 2008 Institutes were successful as shown by the high rankings of most of the sessions and the overall Institute program. One Fellow summarized the 2008 Institute as a, “superb opportunity” and said not to “lose the delicate balance of organization and flexibility.”

The site of the Institute in Chapel Hill, NC and the accommodations at the Carolina Inn were very popular with the Fellows. The Stone Center on the UNC campus was a roomy space that provided sufficient space for presenters, fellows and observers. The tables were large enough to accommodate note taking and it was easy for people to move in and out of their spaces.

The evaluation results of the 2007 Institute provided guidance for planning for 2008. In particular, the number of presentations, printed information provided, meeting facilities, accommodations, and communication prior to the Institute showed marked improvement from 2007 to 2008. The reduced number of days to the program in 2008 appeared to work well though the number of sessions per day should be addressed in future Institutes.

## Recommendations for 2009:

- Review rankings of speakers and consider using some of the highly rated speakers from 2008 such as Dr. Paul Nussbaum for future Institutes. Give special attention to real world examples that Fellows can use to model their library practice after.
- Consider working with presenters to create more interactive sessions during the Institute. Many participants noted the desire for more networking opportunities during the Institute and interactive sessions may be a way to achieve this goal.
- Consider providing readings to Fellows in electronic format before the Institute in order to reduce daily content load.
- Continue improved communications with Fellows prior to the Institute.
- Work on time management issues – make sure the Institute begins on time each day, and that presenters stick to their allotted time.
- Allow more time for breaks during the day.
- Allow more time for reflection on sessions and for discussion of topics. Provide more group exercises during sessions to encourage engagement and hands on learning by Fellows.
- Incorporate more information on models of lifelong access programming in libraries, especially on community partnerships.

- Improve post-Institute activities to help build support for ongoing LAL activities. Consider building an online environment in which Fellows can interact and share.

## **Appendix 1: Institute 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

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

**Libraries for the Future  
Lifelong Access Libraries™ Institute 2008  
July 27-30, 2008  
School of Information and Library Science  
University of North Carolina, Chapel Hill**

Please answer the questions, seal it in the envelope and return it to Joanne Marshall, Carrie Dundas-Lucca or Cheryl Thompson.

**Overall Institute Evaluation**

1. For each of the areas below, please indicate your rating using the following scale:

<b>Circle only one answer.</b>	<b>Excellent</b>	<b>Good</b>	<b>Average</b>	<b>Fair</b>	<b>Poor</b>	<b>N/A</b>
a. Overall satisfaction	E	G	A	F	P	N/A
b. Programming quality	E	G	A	F	P	N/A
c. Number of presentations	E	G	A	F	P	N/A
d. Number of opportunities for hands on learning	E	G	A	F	P	N/A
e. Number of networking opportunities	E	G	A	F	P	N/A
f. Printed information provided	E	G	A	F	P	N/A
g. Meeting facilities	E	G	A	F	P	N/A
h. Accommodations	E	G	A	F	P	N/A
i. Meals	E	G	A	F	P	N/A
j. Chapel Hill as a meeting place	E	G	A	F	P	N/A
k. Application process	E	G	A	F	P	N/A
l. Communication prior to Institute	E	G	A	F	P	N/A
m. Helpfulness of staff during Institute	E	G	A	F	P	N/A
n. Other: _____	E	G	A	F	P	N/A

2. Do you have any suggestions for ways to improve the Institute?

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<b>Libraries for the Future</b> <b>Lifelong Access Libraries™ Institute 2008</b> <b>July 28, 2008 Morning Session Evaluations</b>
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**1.1 Session Name:** Longevity from a Humanistic Perspective    **Time:** 9:15 – 10:00  
**Speaker:** Harry (Rick) Moody

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes    0. No

Did the session meet your expectations? 1. Yes    0. No

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**1.2 Session Name:** Understanding Boomers: A Demographic Overview    **Time:** 10:15 – 11:00  
**Speaker:** Victor Marshall

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes    0. No

Did the session meet your expectations? 1. Yes    0. No

Comments: \_\_\_\_\_  
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**1.3 Session Name:** When Lifelong Learning Becomes Active Wisdom **Time:** 11:00 – 11:45  
**Speaker:** Mary Catherine Bateson

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**1.4 Session Name:** Panel Discussion Q&A: Boomers and Libraries: Why Now? **Time:** 11:45 – 12:30  
**Moderator:** Stephen Ristau **Panelists:** Ricky Moody, Catherine Bateson, Dennis Streets, Mary Boone

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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<b>Libraries for the Future</b> <b>Lifelong Access Libraries™ Institute 2008</b> <b>July 28, 2008 Afternoon Session Evaluations</b>
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**1.5 Session Name:** Learning Across the LifeSpan **Time:** 1:30 – 2:30  
**Speaker:** Eleanor Drago-Severson

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**1.6 Session Name:** Civic Engagement: A Critical Perspective **Time:** 2:30 – 3:30  
**Speakers:** Sabrina Reilly, Jill Friedman Fixler, and Stephen Ristau

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**1.7 Session Name:** Interactive Exercise    **Time:** 4:00 – 4:45  
**Speaker:** Hagar Shirman

For each of the areas below, please indicate your rating using the following scale:

<b>Circle only one answer</b>	<b>Excellent</b>	<b>Good</b>	<b>Average</b>	<b>Fair</b>	<b>Poor</b>	<b>N/A</b>
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session?    1. Yes    0. No

Did the session meet your expectations?    1. Yes    0. No

Comments: \_\_\_\_\_

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<b>Libraries for the Future</b> <b>Lifelong Access Libraries™ Institute 2008</b> <b>July 29, 2008 Morning Session Evaluations</b>
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**2.1 Session Name:** “When I’m 64” – Older Adults and Boomers Getting Healthy **Time:** 8:30 – 9:30  
**Speaker:** Mary Altpeter

For each of the areas below, please indicate your rating using the following scale:

<b>Circle only one answer</b>	<b>Excellent</b>	<b>Good</b>	<b>Average</b>	<b>Fair</b>	<b>Poor</b>	<b>N/A</b>
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**2.2 Session Name:** Redefining Aging: Brain Research **Time:** 9:30 – 10:30  
**Speaker:** Paul Nussbaum

For each of the areas below, please indicate your rating using the following scale:

<b>Circle only one answer</b>	<b>Excellent</b>	<b>Good</b>	<b>Average</b>	<b>Fair</b>	<b>Poor</b>	<b>N/A</b>
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**2.3 Session Name:** Health and Diversity **Time:** 10:45 – 11:15

**Speaker:** Debra Barksdale

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_

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**2.4 Session Name:** Consumer Health: Implications for Public Libraries **Time:** 11:15 – 11:30

**Speaker:** Suzanne Flint

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_

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<b>Libraries for the Future</b> <b>Lifelong Access Libraries™ Institute 2008</b> <b>July 29, 2008 Afternoon Session Evaluations</b>
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**2.5 Session Name:** Leading Library Innovation **Time:** 1:00 – 2:00  
**Speaker:** Mark Winston

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**2.6 Session Name:** Stories from the Field: Programs, Partnerships, and Marketing **Time:** 2:00 – 3:00  
**Speakers:** Abigail Elder, Jane Salisbury, Mary Campbell, and Selma Thomas

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**2.7 Session Name:** Lifelong Access: Framework for Converting Theory to Practice **Time:** 3:15 – 4:45  
**Speaker:** Hagar Shirman

For each of the areas below, please indicate your rating using the following scale:

<b>Circle only one answer</b>	<b>Excellent</b>	<b>Good</b>	<b>Average</b>	<b>Fair</b>	<b>Poor</b>	<b>N/A</b>
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_

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<b>Libraries for the Future</b> <b>Lifelong Access Libraries™ Institute 2008</b> <b>July 30, 2008 Morning Session Evaluations</b>
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**3.1 Session Name:** Work After 50: Purpose and Necessity **Time:** 8:30 – 9:30  
**Speakers:** Judy Goggin, Iowaka Barber, Stephen Ristau

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**3.2 Session Name:** The Five Patrons You Meet in Retirement: Post-Career Life Models and Information and Learning Needs **Time:** 9:45 – 10:45  
**Speaker:** Ron Manheimer

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

For each of the areas below, please indicate your rating using the following scale:

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**3.3 Session Name:** Building Creative Partnerships  
**Speaker:** Susan Perlstein

**Time:** 10:45 – 11:45

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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**3.4 Session Name:** Discussion: What does it mean to be a Lifelong Access Fellow? **Time:** 12:00 – 1:30  
**Speakers:** Diantha Dow Schull, Joanne Marshall, and Stephen Ristau

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes 0. No

Did the session meet your expectations? 1. Yes 0. No

Comments: \_\_\_\_\_  
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<b>Libraries for the Future</b> <b>Lifelong Access Libraries™ Institute 2008</b> <b>July 30, 2008 Afternoon Session Evaluations</b>
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**3.5 Session Name:** Stories from the Field: Leadership and Innovation    **Time:** 1:30 – 2:15  
**Speakers:** Suzanne Flint and Kathy Graybeal

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes    0. No

Did the session meet your expectations? 1. Yes    0. No

Comments: \_\_\_\_\_  
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**3.6 Session Name:** Creating an Action Plan    **Time:** 2:15 – 3:15  
**Speakers:** Hagar Shirman and Stephen Ristau

For each of the areas below, please indicate your rating using the following scale:

Circle only one answer	Excellent	Good	Average	Fair	Poor	N/A
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session? 1. Yes    0. No

Did the session meet your expectations? 1. Yes    0. No

Comments: \_\_\_\_\_  
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**3.7 Session Name:** Evaluations    **Time:** 3:15 – 3:45  
**Speaker:** Joanne Marshall

For each of the areas below, please indicate your rating using the following scale:

<b>Circle only one answer</b>	<b>Excellent</b>	<b>Good</b>	<b>Average</b>	<b>Fair</b>	<b>Poor</b>	<b>N/A</b>
Content of the Presentation	E	G	A	F	P	N/A
Overall Satisfaction	E	G	A	F	P	N/A
Length of the Session	E	G	A	F	P	N/A
Sufficient Time for Questions	E	G	A	F	P	N/A
Presentation Handouts	E	G	A	F	P	N/A

Did you gain new information or insight on the topic from this session?    1. Yes    0. No

Did the session meet your expectations?    1. Yes    0. No

Comments: \_\_\_\_\_

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