



Counting On Results

Instruction Manual

A Research & Demonstration Project funded by a
National Leadership Grant from the
Institute for Museum and Library Services

Keith Curry Lance
Rochelle Logan
Marcia J. Rodney



Christie M. Koontz
Dean K. Jue
Geo-Marketing International

February 5, 2001

Table of Contents

Preface.....	3
SECTION A. THE IMLS PROJECT AND SERVICE RESPONSES.....	4
SECTION B. ISSUES IN COLLECTING OUTPUT DATA BY SERVICE RESPONSE	8
Collecting Output Measures Data.....	8
General Information.....	10
Basic Literacy.....	15
Business & Career Information.....	19
Library as Place.....	23
Information Literacy.....	26
Local History & Genealogy.....	29
SECTION C. PALM PDA INITIALIZATION FOR IMLS PROJECT	32
Introduction to Palm PDA Usage.....	32
Setting Up the Palm PDA for First-Time Use	34
Preliminary Set-up through Palm Desktop Initialization	35
IMLS-PDA Program Installation and Testing.....	37
Testing Palm and PC Communication	42
Uploading Library Data to Your Computer	43
Exporting and Sending Your Data Files to Us	44
Removing And Un-Installing The IMLS Application	48
Troubleshooting	49
Re-Initializing the Palm PDA	51
Palm PDA Instructions for the IMLS Project	52
SECTION D. COLLECTING OUTCOME MEASURES.....	60
The Questionnaires—Their Content and Development	60
Survey administration options	60
Survey results and reports.....	65
Sample Press Release	67
Sample Handout.....	68
Sample Signage	69
Staff Training: Sample Agenda.....	70
Glossary	71
Bibliography	72
APPENDIX A. OUTCOME SURVEYS	
APPENDIX B. EXAMPLES OF OUTPUT MEASURES FOR EACH SERVICE RESPONSE	
APPENDIX C. DATA COLLECTION FORMS	
APPENDIX D. PALM PDA CODES FOR LOCATIONS AND ACTIVITIES	

Preface

This instruction manual is written specifically for public libraries participating in Counting On Results, a Research and Demonstration project funded by a National Leadership Grant from the Institute of Museum and Library Service (IMLS). The project's purpose is to develop collectible service-specific output and outcome measures for public libraries. The project began on October 1, 1999 and ends on September 30, 2001.

The research team is headed by Keith Curry Lance of the Colorado Department of Education's Library Research Service, with assistance from Rochelle Logan and Marcia Rodney. Consultants to the project are Christie Koontz and Dean Jue of GeoMarketing International, Inc., Tallahassee, Florida.

The first three sections of this manual provide a discussion on library output data and detailed instructions on how to use the Palm personal digital assistant (Palm PDA) for this IMLS project. The remaining section provides information and instruction on outcome measures and survey administration.

This manual does not constitute a complete documentation of everything a user may need to know about operating the Palm IIIxe. While the researchers will make every attempt to help you if you run into problems using the PDA, the researchers do not work in a computer hardware and software development company. Some librarians may need to consult other documentation, or persons, on the proper usage of the PDA in more unusual situations.

All libraries participating in this research project are being provided with both the Palm PDA IIIxe and a blue paperbound book entitled "Handbook for the Palm III Handheld." Please refer to that document first with questions not answered in this supplementary manual. You may also find that a technology person on your staff can solve a problem you may encounter with your PDA. If problems persist, please contact Dean Jue at GeoMarketing International, Inc., either by e-mail (djue@geomarket-intl.com) or by phone at (850) 386-7308. For more general questions on data collection issues, please contact Keith Curry Lance at the Library Research Service, either by e-mail (keithlance@earthlink.net) or by phone at (303) 866-6737.

SECTION A. THE IMLS PROJECT AND SERVICE RESPONSES

What are the purposes of collecting library output and outcome data?

There are several purposes for collecting output and outcome data for public libraries. These data will allow public library decision-makers to:

1. assess library use, much of which is not currently counted, more completely;
2. develop a range of standardized and more detailed measures for selected service responses;
3. provide alternatives to circulation as the definitive measure of public library use;
4. justify the allocation of library resources better by taking into account all types of use; and
5. identify the impact of the public library on the community by gathering service specific outcome data.

What are some important data collection considerations?

Public libraries collect different data, often in different ways. This study is the first of its kind to present a nationwide "snapshot" of public library use, gathering data for selected **Planning for Results** (PFR) service responses (Himmel and Wilson 1998.) It is therefore important to standardize the methods of data collection, while acknowledging that there is diversity among libraries that cannot be totally eliminated. Please keep in mind the following when collecting the data:

1. **Please read this manual thoroughly before starting. Consistency in data collection is essential.** Count the same things in the same way, regardless of when counted or by whom.
2. **Data to be collected have been determined.** Notice, however, that there is often an *Other* category to allow some flexibility for activities unique to your library. Whenever possible, the decision to count a specific element came from our interviews with key informants. However, the diversity in size and location of our volunteers meant leaving out elements you may consider important.
3. **Always respect user privacy** while collecting data on use of library materials and services, and minimize the intrusiveness of observation.
4. **The use of the pre-programmed Palm PDA is meant to facilitate counting the often hard to collect, but extremely important library output data.** If you need to use a manual tally sheet for part of the data collection, please have a tally sheet mirror the Palm screens. Tally sheets that met this requirement are provided in Appendix C.
5. **Allow staff time to experiment with the data collection processes and the Palm PDA.** The technology should facilitate the data collection--not increase staff frustration.

What is a service response?

In the late eighties the Public Library Association published eight roles for public libraries that described broad categories of service the library was providing (McClure, et al., 1987). Libraries were encouraged to select the roles that applied to the products and services primarily offered to their community. In the late nineties, there was growing interest among library professionals in expanding and refining the original eight roles to describe more precisely what the library does to meet pre-defined community needs. As a result, 13 service responses were developed for PLA's new planning process (Himmel and Wilson, 1998). These are defined on page 6.

What is the difference between an output measure and an outcome measure?

The thirteen service responses provide a vehicle that facilitates more precise data collection efforts, providing a sharper image of library use to funders and library decision makers. Additionally, the service responses provide a much wider range of choices for public libraries than the previous eight roles introduced by **Planning and Role Setting for Public Libraries** (1987) to measure gross levels of service (e.g., circulation per capita). The output measures suggested were not linked to any specific role and were therefore less precise. The output measures in this study will be directly linked to each service response.

During the late 1990's, another type of performance measure became ubiquitous in non-profit organizations ranging from the Red Cross and United Way to public libraries. This new type of evaluation measure is called an *outcome*. This new evaluation concept attempts to measure the impact of services on their users. In other words, what difference did your visit to the library make on your job performance, personal well-being, cultural awareness, etc.? This type of measure is more difficult to gather as it is based on feedback that must be elicited from users directly via survey.

This project is both timely and important, as library professionals and others address increasing calls to accountability by funders and the public. Decision makers are no longer satisfied with large output figures--high number of service transactions alone. They also want to know outcomes--the benefits of the public library to individuals and groups in the community.

How will Counting on Results benefit the library community?

The purpose of this project is threefold: 1) to develop output measures directly linked to the services responses; 2) to develop the hardware and software tools required to collect such data; and 3) to develop standardized user survey questionnaires that will enable libraries to collect comparable outcome data from users by service response.

Can you please define each service response?

The first nine service responses are those addressed in this study. The latter four are not addressed in this project, but are part of **Planning For Results**.

Counting On Results Instruction Manual

BASIC LITERACY service addresses the need to read and to perform other essential daily tasks. Possible service components: ESL; family literacy; tutoring; functional math skills; instructional media/tutoring software; meeting space for tutoring.

BUSINESS AND CAREER INFORMATION services address a need for information related to business, careers, work, entrepreneurship, personal finances and obtaining employment. Possible service components: career guidance counseling; job placement service; public use computer equipment for preparing resumes; copy center; job development programs; WWW links.

COMMONS environment helps address the need of people to meet and interact with others in their community and to participate in public discourse about community issues. Possible service components: meeting room space; community events bulletin board or kiosk; email access; coffee shop; video conferencing facilities.

COMMUNITY REFERRAL addresses the need for information related to services provided by community agencies and organizations. Possible service components: Community information databases; 24 hour I&R; dial-in access to community resource files; electronic access to community resources via malls, schools, etc.

CURRENT TOPICS AND TITLES helps to fulfill community residents' appetite for information about popular cultural and social trends and their desire for satisfying recreational experiences. Possible service components: book talks; author signings; readers' advisory; display shelves

GENERAL INFORMATION helps meet the need for information and answers to questions on a broad array of topics related to work, school, and personal life. Possible service components: basic reference resource available through the library web page; 24 hour electronic reference service; dedicated telephone reference service; ready reference; bibliographic instruction programs

INFORMATION LITERACY service helps address the need for skills related to finding, evaluating and using information effectively. Possible service components: classroom space; media literacy; computer laboratory; bibliographic instruction; instructional technology.

LIFELONG LEARNING service helps address the desire for self-directed personal growth and development opportunities. Possible service components: electronic and printed pathfinders; how-to programs on topics of general public interest; special topical displays; demos and exhibits; history and biography resources.

LOCAL HISTORY AND GENEALOGY services address the desire of community residents to know and better understand personal or community heritage. Possible service components: instruction in genealogical research methods; programs on local history; archives; indexed newspapers; WWW links.

Counting On Results Instruction Manual

The following four service responses were not chosen by a sufficient number of libraries participating in this study. Some of the services described in these responses are represented within chosen service responses.

CONSUMER INFORMATION service addresses the need for information to make informed consumer decisions and helps residents become more self-sufficient. Possible service components: special programs on health, legal or consumer topics; library web page on consumer issues; library publications and flyers; consumer complaint hotline; tele-text service on consumer topics; consumer affairs bulletin board.

CULTURAL AWARENESS service helps satisfy the desire of community residents to gain an understanding of their own cultural heritage and the cultural heritage of others.

Possible service components: ethnic resource centers; library materials in several languages; lectures and book discussion groups; cultural fairs and exhibits.

FORMAL LEARNING SUPPORT helps students who are enrolled in a formal program of education or who are pursuing their education through a program of home-schooling to attain their educational goals. Possible service components: specialized curriculum-based collections; homework help center; computer lab; www site links with educational sites.

GOVERNMENT INFORMATION service helps satisfy the need for information about elected officials and governmental agencies that enables people to participate in the democratic process. Possible service components: electronic access to local government information; federal, state, and local documents and records depository.

SECTION B. ISSUES IN COLLECTING OUTPUT DATA BY SERVICE RESPONSE

Collecting Output Measures Data

Your library will be collecting two types of output measures. One type is what will be referred to as recorded output measures and the second type is what will be referred to as observed activity measures. Below is a table describing the major differences between the two types of output measures:

Characteristic	Recorded Output Measures	Observed Activity Measures
Timeframe	February to June 2001	February to June 2001
Duration of Data Collection	various, minimum of ten sample days	ten sample days representing your regular hours
How collected	using provided data collection forms or library's own forms; through library's automated system	by observation using Palm PDA
Type of Data Collected	some user activities; collections usage	observed user activities only
Data Entry	on data collection forms or summarized from automated system	directly onto Palm PDA
Transmission of data to IMLS Research Team	data entered into Palm PDA; data is then transferred from Palm PDA to local PC and files sent to IMLS research team	transferred from Palm PDA to local PC and files sent to IMLS research team

All libraries participating in this study will collect observed activities measures. The data collection form on the PDAs is identical for all libraries.

In contrast, there are different recorded library output measures for the different service responses. While many libraries have identified one primary service response for their particular library outlet, some libraries have identified two or three service responses for their outlets.

Thus, each library participating in this study will have at least two different data entry forms on their Palm PDA, one for observed activities and one for recorded output measures for each chosen service response. Some libraries in this study may have up to four different data entry forms on their Palm PDA, one for observed activities and three recorded output measure forms for up to three service responses.

What will the forms for the different recorded library output measures look like on the Palm PDA?

There are six different data entry forms for recorded library output measures on the Palm, one for each of the six different service responses being studied in this IMLS project. As discussed earlier, the six different service responses for which you may be entering recorded library output measures are:

- 1) Basic Literacy
- 2) Business and Career Information
- 3) Commons/Community Information
- 4) Current Titles/General Information/Lifelong Learning
- 5) Information Literacy
- 6) Local History and Genealogy

As you can see some service responses have been combined after this project was pretested.

There is a different data entry "form" for each service response's recorded library output measures, with the "form" for a service response being a varying number of Palm PDA screens on which you will enter one piece of data (information) for each screen. As you would expect, there are different types of recorded library output data that are being collected for the different service responses. Please review the information in Appendix B to preview all of the categories of recorded library output data that you will enter into the Palm PDA for your particular service response(s). In that appendix, each category of recorded output measures being collected is illustrated with examples.

What will the form for the observed library activities look like on the Palm PDA?

Unlike for service responses, there is just one generic data collection form for observed library activities. Regardless of the number and types of service responses for which you are collecting recorded library output measures, you have just one observed library activities data collection form.

When you are *observing* a library activity, keep in mind that the observation process has a beginning and an end. Capture the library use you are observing into a 'snapshot.' For each library activity (use), you will be identifying four items of information: 1) the location of the activity; 2) the actual activity you are observing; 3) the age(s) of the user(s) you see participating in this activity; and 4) the number of user(s) at given age(s) in this activity. Please review the information in Appendix B to preview all the categories of observed library activities output data that you will enter into the Palm PDA. In that appendix, each category of observed library activities being collected is illustrated with examples.

General Information (Includes Current Topics & Titles and Lifelong Learning)

As part of the Counting On Results project, participating libraries will use Palm handheld computers with customized software to report conventionally recorded, but specialized versions of traditional output measures. They will also use the handheld computers to record statistical “snapshots” of the observed activities of library users, the locations of those activities, and the age groups of the users.

Neither project staff nor key informants were able to distinguish from each of the other three of the nine service responses encompassed in this study. They are Current Topics and Titles, General Information, and Lifelong Learning. For purposes of this project, these three service responses are combined into one labeled General Information. Unlike the remaining five service responses, this one is not related to a particular public library service. For that reason, General Information data will be far simpler to collect as traditional output transactions and observed user activities will not have to be filtered for their relevance to a particular service response. Consequently, many of the questions about collecting such data that will be common for the other five service responses do not arise for the General Information option.

That being the case, let us consider questions about when, where, and how these data may be collected.

Recorded Output Measures

Since the late Eighties, most public libraries have been tracking traditional output measures, such as library visits, circulation, reference questions, and interlibrary loan transactions. What complicates the collection of such data in this project is the desire to filter such service transactions for a particular type of service. In some cases, this can be done relatively easily, thanks to the format of materials, how materials are cataloged, and layout of the library facility. In other cases, however, it can be either very difficult or simply impossible. It is for this reason that the Palm software developed for this project enables participants to select the recorded output measures they will report.

Participating libraries are expected to collect and report recorded output measures at least four times and not more than ten times between February and June 2001. The interval for which these measures may be reported includes a day, a week, and a month. So, in part at least, the number of reports may be dictated by the interval for which data are being reported. This provision is designed to enable participants to dovetail this project’s data collection with current data collection practices whenever possible.

How can library visits be counted?

Most libraries estimate the number of library visits based on turnstile or electric-eye counts. (See Glossary.) Where these mechanisms are not available, particularly within specific library areas, estimates of visits may be based on sample observations by staff (e.g., counting the number of visitors entering or leaving the

library or area for 15 minutes every two hours and multiplying to reflect the entire day, week, month, etc.)

What kinds of questions should be counted?

For most service responses, only reference questions are counted, but, for the General Information option, counts of both directional and reference questions are requested. (See Glossary.) There is also a subset of reference questions received or answered via the Internet.

Which circulation transactions should be counted?

Most, if not all, libraries participating in this project have automated circulation systems. In addition to the total number of circulation transactions for a week or month, they are asked to report total fiction circulation and the number of hold requests. (See Glossary.) Most automated circulation systems either provide these figures routinely or can be programmed to do so.

What types of in-library use should be counted?

Although in-library use of materials is a traditional output measure, it is one of the more difficult to collect. (See Glossary.) For the General Information option, total in-library use is requested as well as the subsets for reference materials, circulating materials, and periodicals. In most libraries, the distinctive cataloging of reference items and the distinctive formats of periodicals should make these statistics relatively easy to collect.

While Output Measures for Public Libraries (second edition) advocates collecting such statistics for a "typical week," for purposes of this project, it is recommended that such statistics be collected for ten randomly selected days, not necessarily falling in two particular weeks.

What types of interlibrary loan and document delivery statistics should be counted?

For the General Information option, two interlibrary loan figures are requested: the total numbers of items sent to and obtained from other libraries. (See Glossary.) No distinctions are called for by format or between returnables and non-returnables (books and photocopies). Existing procedures in most libraries will suffice to generate these figures.

In addition to these two traditional ILL statistics, two document delivery statistics are requested: the total number of items delivered off-site (e.g., to day care centers or nursing homes or to the homebound) and the subset of such items that are non-fiction. Many libraries track these items via their automated circulation systems, but others may do so by manual means.

What types of programming statistics should be counted?

Traditionally, public libraries have focused on counting only on-site programs and attendance at such programs. (See Glossary.) For the General Information option, these two statistics are requested for both on-site and off-site programs. Sample statistics for off-site programs may be most easily collected utilizing the existing local mechanism for counting on-site programs and their attendance. For most libraries, this is a manual process.

What types of statistics should be collected about use of the library's website?

Participating libraries may choose between three major types of website usage statistics for purposes of this project: file hits, page views, and visitors or user sessions. (See Glossary.) While page views and visitors or users sessions are more meaningful statistics, a file hit is often the figure most readily obtainable. Participants are encouraged to consult with technology staff for their libraries to determine which of these statistics is most readily obtainable and most meaningful to the library's administration.

Which CD-ROM uses should be counted?

For the General Information option, uses of all CD-ROMs that are part of the library's collection should be counted. Uses of CD-ROMs owned by the library that are exclusively for staff use and that are not cataloged into the collection should not be included.

Methods of counting CD-ROM usage vary among libraries, although many make no attempt to measure it at all. The most valid and reliable method involves the use of metering software. Many CD-ROMs contain their own metering features. Most CD-ROM jukeboxes also come with metering software. Other libraries have adopted less sophisticated, but equally effective strategies for counting such use. At some libraries, patrons must "check out" CD-ROMs from service desks, so that records of these transactions make their way into the library's automated circulation system. Other libraries require patrons to sign up for designated blocks of time at computers with CD-ROM drives or ask them to make hash marks on log sheets kept at such computers to report their use of CD-ROMs.

Do not include usage statistics for licensed databases accessed via the World Wide Web. This usage will be reflected in Web statistics.

Observed Activity Measures

A major issue when recording observations of user activities in the library is respecting the user's privacy. While the relationship of some service responses to particular areas (e.g., Business/Career Information, Local History & Genealogy) makes associating an observed user with the service response easy, in other cases this is very problematic (e.g., Information Literacy, Library as Place). For the General Information option, however, this is not an issue at all. As no specific service response is being studied, all users should be included in these observations.

Participating libraries are expected to collect and report observed activity measures on at least ten days between February and June 2001. Each of these days, observations should be made utilizing the Palm handheld computer at least once during each period of the day (morning, afternoon, evening) the library is open to the public.

How should library users at service desks be counted?

For each service response option involved in this study, it is important to begin by identifying the appropriate service desks to be included in these observations. For the General Information option, all service desks should be included.

Count each user observed at a service desk, regardless of the specific activity in which they are engaged. For instance, if two library users are asking a reference question of a staff member, count each user.

How should those observed attending library events be counted?

For the General Information option, all library events occurring during the observation "windows" should be included in the attendance count. There are several alternatives for determining the attendance figure for a library event. If the event requires some form of registration, the number may have become a matter of record before the event occurred. This figure may also be estimated by counting numbers of seats or handouts, particularly if a break is being taken during the observation period. The simplest method, however, may be to simply go to the meeting room or other event location and count the number of individuals present. For very large events or events at which attendees are not seated, estimates are not only acceptable but also encouraged.

When, where, and how should library users in the stacks be counted?

For the General Information option, all library users observed in the stacks should be counted. Include stacks for all formats of materials as well as other areas in which materials in non-print formats are housed. Examples: map cases, microfilm cabinets, carrels containing shelves of specialized reference works.

When, where, and how should library users interacting with others be counted?

For the General Information option, all library users interacting with others should be included. Do not duplicate in this figure users observed in any of the other activities for which observations are being made. For instance, exclude users interacting with staff at service desks, with each other at events, at library displays, and so forth.

When, where and how should library users observed reading or writing be counted?

Once again, for the General Information option, all users observed reading or writing should be counted. As indicated above, do not count users already counted for other observable activities. Usually, those involved in reading or writing will be alone, or, if they appear to be part of a group, will be reading or writing silently—without interacting overtly with those around them.

When, where, and how should library users observed at computers be counted?

For the General Information option, anyone observed using a computer should be counted. While in the vast majority of cases this will mean using a library computer, those using personal laptop or handheld computers may be included.

When, where, and how should library users observed viewing displays be counted?

For the General Information option, anyone observed viewing any library display should be counted. Displays may include bulletin boards, exhibit cases, or freestanding exhibits. Such displays may or may not feature library materials.

When, where, and how should library users observed viewing or listening to audio-visual materials be counted?

For the General Information option, anyone using any audio-visual format should be counted. The most common formats are likely to be microforms, books on tape, videos, and DVDs.

Basic Literacy

Recorded Output Measures

What are some examples of Basic Literacy reference questions?

“My 15 year old son is having trouble reading at his grade level. Do you have some books that would be easier for him to read?”

“My organization is sponsoring a refugee family that is moving to our community. Where can we direct them for help in learning English?”

“I’m tutoring a co-worker on basic math skills. Can you help me find some workbooks, CD-ROMs, or websites that might be helpful?”

What types of Basic Literacy materials should be counted in circulation, in-library use, and document delivery?

Basic Literacy materials include:

- Adult Basic Education and English as a Second Language curriculum materials
- High-interest/low-vocabulary books
- Audio tapes for learning a new language
- Books, magazines, and newspapers in languages other than English
- Magazines and newspapers for children

How can we count Basic Literacy tutoring sessions?

Capture this figure through special or regular sign-up sheets for meeting space or staff involvement in or knowledge of the activity. Count the number of tutoring sessions occurring in the library, not the number of individuals involved in such sessions. Generally, tutoring sessions occur on a one-to-one basis.

What types of on-site and off-site programs should be counted for Basic Literacy?

Include on-site programs, such as book talks, story times, summer reading program activities, and any other reading incentive activities designed for children. Report as off-site programs library-sponsored events that occur elsewhere.

Also include adult literacy, English as a Second Language (ESL), and General Educational Development (GED) testing programs that occur at the library or elsewhere with the library’s sponsorship or support. Adult literacy, ESL, and GED programs usually occur under the aegis of community-based organizations dedicated to literacy efforts. Occasionally these programs are based in libraries, but more often libraries are partners in such efforts. Report as on-site programs library-sponsored events occurring in the library and as off-site programs library-sponsored events occurring elsewhere.

When should we count the issuing of new cards as a Basic Literacy output measure?

Include all new cards issued to children. Also include all new cards issued as part of outreach efforts to new community residents and to local families and community-based organizations that work with new adult readers and new English speakers.

Which web page hits, views, or user sessions should be counted for Basic Literacy?

Include any web pages designed specifically for children or for young adult or adult students in ABE, ESL, or GED classes. Examples: a page of links to kid-friendly sites on the World Wide Web, pages about the library's summer reading program, directory pages for adult literacy organizations or GED testing sites in the community.

Which uses of CD-ROMs should be counted for Basic Literacy?

Likewise, include any CD-ROMs designed specifically for the groups listed above. Examples: CD-ROMs that teach children letters and numbers and ones that help adult non-English speakers to learn English.

Observed Activity Measures

Generally, being able to associate an observed activity with a specific service response, such as Basic Literacy, will depend on the extent to which the activity takes place in an area specifically assigned to that service response and/or the extent to which the nature of the activity can be discerned through unobtrusive observation.

What kinds of Basic Literacy activities can be observed at service desks?

The most readily observable Basic Literacy activities at service desks will be those involving children. Examples: a child receiving a borrower's card, checking out materials, or asking a question. The ability to observe service desk activities associated with this role for adults may depend on staff acquaintance with individual users, adults visiting the library either with staff of a literacy-related organization or as part of a group associated with such an organization.

What types of Basic Literacy events might library users be observed attending?

Include all on-site library programs associated with ABE, ESL, or GED programs and community-based literacy organizations.

Exclude one-to-one tutoring sessions.

When would observing a library user in the stacks count for Basic Literacy?

For purposes of this study, it would be helpful to identify specific areas in the library stacks where Basic Literacy materials are located. Only users observed in these areas should be counted.

What types of interaction with others at the library should be counted as Basic Literacy activity?

Include adults reading to children, children reading to each other, and one-to-one tutoring sessions involving children or adults.

Exclude on-site programs as described above.

When should a library user observed reading or writing be counted as Basic Literacy activity?

As at service desks, the most readily observable reading and writing associated with Basic Literacy will be that involving children. Examples: a child reading in the children's area, a group of new adult readers reading in the area for high-interest/low-vocabulary books. The ability to observe solitary reading and writing associated with this role for adults may depend on staff acquaintance with individual users, adults visiting the library either with staff of a literacy-related organization or as part of a group associated with such an organization.

When should someone using a computer be counted as a Basic Literacy activity?

The conditions that apply at service desks and when users are observed reading or writing also apply to computer use. In addition, computer use associated with this service response may be discernible based on staff familiarity with the individual in question, the software or CD-ROM being used, or the content being viewed. Examples: a child using a CD-ROM designed to help learn letters or numbers, an adult visiting the website of a local GED testing center.

When would someone viewing a display count as a Basic Literacy activity?

Count as a Basic Literacy display any exhibit promoting reading generally or designed for or related to children, new adult readers, or ABE, ESL, or GED students. Examples: general reading promotion exhibits, such as during National Library Week; special displays related to library-based literacy efforts.

When would someone viewing or listening to audio-visual materials (books on tape, videos, DVDs) count as a Basic Literacy activity?

The conditions that apply at service desks and when users are observed reading or writing or using computers also apply to A/V use. In addition, A/V use associated with this service response may be discernible based on staff familiarity with the

Counting On Results Instruction Manual

individual in question, the particular book on tape, video, or DVD being used, or the general nature of the content being viewed. Examples: a child using a book/tape set, an adult watching a video on preparing for the GED test.

Business & Career Information

Recorded Output Measures

How should we count visits to the business and career area?

Most libraries that identify Business & Career Information as a service response dedicate a specific area in their facilities to this function. This area houses the primary sources on this topic. For most such libraries, therefore, it should be relatively easy to count user visits to this specific area of the facility.

What are some examples of business and career reference questions?

"Can you help me find information about local jobs on the Internet?"

"My daughter is having trouble deciding between college and vocational training. Do you offer any workshops that could guide her?"

"I am opening a home-based business and want to learn more about the community so I can make better decisions about what products to stock. Do you have information like that?"

"I am supposed to bring a resume to my job interview tomorrow, and I have never written one. Do you have some good examples?"

What types of business and career materials should be included in circulation, in-library use, and counts for off-site document delivery and interlibrary lending and borrowing?

Materials related to this service response cover a wide variety of topics including: obtaining employment, starting a small business, choosing a career, dealing with personnel and other workplace issues, entrepreneurship, and personal finance (investments, retirement planning). Include any materials used in support of activities such as career guidance counseling, job placement, resume preparation, or job development.

What types of on-site and off-site programs should be counted for Business/Career Information?

Include on-site library-sponsored programs, such as career days, job fairs, resume writing workshops, tax preparation seminars, and investment club meetings. Report as off-site programs similar library-sponsored events occurring elsewhere.

Which hits, page views, or user sessions should be counted for Business/Career Information?

Include statistics for any web pages designed specifically to address business or career topics as described above. Examples: pages of links to labor force or stock market data or market research statistics. For definitions of hits, page views, and user sessions, see the Glossary appended to this manual.

Which uses of CD-ROMs should be counted for Business/Career Information?

Likewise, include any uses of CD-ROMs designed specifically to address business or career topics as described above. Examples: a CD-ROM that facilitates tax preparation for a small business or one that assists an individual in personal financial planning toward retirement.

Observed Activity Measures

What kinds of Business/Career Information activities can be observed at service desks?

Count all individuals observed at the service desk in the Business/Career Information area. Such library users might be asking a reference question, obtaining assistance in conducting an Internet search, or obtaining a reference item to which access is restricted.

What types of Business/Career Information events might users be observed attending?

Business/Career Information events may include: career days, job fairs, resume writing workshops, tax preparation seminars, and investment club meetings

When would observing a library user in the stacks count as a Business/Career Information activity?

For purposes of this study, it would be helpful to identify specific areas in the library stacks where Business/Career Information materials are located. Presumably, most of these stacks will be within the Business/Career Information area, but additional areas may also be included, if warranted. Only users observed in these areas should be counted. Example: a library user browsing biographies of major business leaders or locating a specific book on improving job hunting skills.

What types of interaction with others at the library should be counted as Business/Career Information activity?

Include library users consulting staff, conferring with each other, and meeting informally in groups, either in general reading areas or in any small meeting spaces that may be available for such ad hoc gatherings. Examples: a library user talking

to a staff member or another user about the latest report on inflation, a small group from an investment club doing research together.

When should a library user observed reading or writing be counted as a Business/Career Information activity?

Include any library user observed reading or writing in the Business/Career Information area of the library. Users observed in ancillary areas identified for purposes of this study may also be included. Example: Someone reading a biography of a major business leader or a local company's annual report.

If someone is observed in the Business/Career Information area of the library, but the observer knows that the individual is not utilizing the library for Business/Career Information purposes, that person need not be included. For example, the individual may be occupying the last available chair and it just happens to be in that area. If the observer is uncertain about the purpose of the observed user, then that individual should be counted.

When should someone using a computer be counted as a Business/Career Information activity?

Include any library user observed using a computer located in the Business/Career Information area of the library. Users observed at other computers located elsewhere in the library but identified as appropriate for purposes of this study may also be included. Example: Someone reviewing statistics for their stock portfolio via the World Wide Web.

As for reading/writing, users observed at computers in the Business/Career Information area need not be counted, if the observer knows that the individual in question is not using the computer for Business/Career Information purposes. For example, the person in question may simply be using the last available computer, one that just happens to be in that area.

When would someone viewing a display count as a Business/Career Information activity?

Include users observed viewing all displays located in the Business/Career Information area of the library as well as displays in any other areas identified as appropriate for purposes of this study. Example: a display on the community's top 10 employers.

When would someone viewing or listening to audio-visual materials (books on tape, videos, DVDs) count as a Business/Career Information activity?

Include users observed at viewing/listening stations located in the Business/Career Information area or at other viewing/listening stations elsewhere in the library, so long as it can be established that the a-v materials being utilized relate to Business/Career Information. Such knowledge may be based on staff familiarity with the individual in question, awareness of the particular book on tape, video, or DVD

being used, or recognition of the general nature of the content involved. Example: Someone watching a PBS video on personal financial planning.

Library as Place (Includes Commons, Community Information & Referral)

Recorded Output Measures

Which library visits should we count for Library as Place?

Include all visits to the library.

What are some examples of Library as Place reference questions?

"We are new in town. What day care centers are closest to our home? Do you have the state ratings?"

"We have a new employee moving to town with pre-teenage children. What information do you have on local middle schools?"

"One of my employees is quadriplegic and is looking for a new apartment. Do you have a list of local apartment complexes that comply with the Americans with Disabilities Act (ADA)?"

What types of materials should be included in in-library use and off-site delivery statistics for Library as Place?

Include materials in all formats related to local community events; local government agencies, colleges and universities, public schools, libraries, charities, neighborhood associations, and other non-profit organizations; other local resources for dealing with legal, health, educational, and consumer issues; and other local clubs and organizations.

What types of library programs and community events (on-site and off-site) happening at the library should be counted for Library as Place?

Report the number of library-sponsored community-related programs and total attendance at such programs, both those happening at the library and those occurring elsewhere. Also report numbers of events and attendance for community events happening at the library, even without library sponsorship. Examples: neighborhood association meetings, public hearings on zoning regulations, political debates, early and Election Day voting, 12-step group meetings, United Way campaign events, and community holiday celebrations (e.g., July Fourth, Labor Day).

When should we count numbers of brochures, bibliographies, pathfinders, and user guides distributed from the library and numbers of notices posted on community bulletin boards located in the library for Library as Place?

Include all such documents associated with community events, institutions, and organizations such as those described above.

Which web page hits, views, or user sessions should be counted for Library as Place?

Include statistics for any web pages devoted to local community information, such as calendars of public events, directories of officials and organizations, photographic archives of historical local events, and databases of public records.

Observed Activity Measures

What kinds of activities at service desks should be counted for Library as Place?

Count all individuals observed at the Community Information & Referral desk as well as those observed at other reference desks when it can be determined that a CI&R question is being addressed.

For what types of events should attendance be counted for Library as Place?

Count all individuals observed attending library-sponsored events and community events happening at the library, such as neighborhood association meetings, public hearings on zoning regulations, political debates, 12-step group meetings, United Way campaign events, and community holiday celebrations (e.g., July Fourth, Labor Day).

When would observing library users in the stacks count as a Library as Place activity?

Count all individuals observed in stack areas housing Community Information & Referral materials and other local community information. Examples: someone looking up a listing in a local telephone directory, or locating an area newspaper.

What types of interaction with others at the library should be counted as a Library as Place activity?

Include library users consulting staff, conferring with each other, and meeting informally in groups, either in general reading areas or in any small meeting spaces that may be available for such ad hoc gatherings. Examples: someone asking a staff member or another library user for information about a local hobby club, a small group of mothers visiting during storytime.

When should a library user observed reading or writing be counted as a Library as Place activity?

Include anyone observed reading or writing in the Community Information & Referral area or elsewhere in the library when it can be determined that they are using local community information. Example: Someone reading an area newspaper or a flier about an upcoming local event, someone taking notes from local public records.

When should someone using a computer be counted as a Library as Place activity?

Include anyone observed using a computer located in the Community Information & Referral area or in a general computer area when it can be determined that the computer is being used to access local community information. Example: someone visiting the website of a local company, educational institution, or non-profit organization.

When would someone viewing a display count as a Library as Place activity?

Include anyone observed viewing displays on local topics or located in areas designated specifically for local community information. Example: an exhibit about the founding of the community.

When would someone viewing or listening to audio-visual materials (books on tape, videos, DVDs) count as a Library as Place activity?

Include those observed at viewing/listening stations located in the Community Information & Referral area or elsewhere in the library, so long as it can be determined that the materials in use contain local community information. Example: someone listening to an audio book about local history.

Information Literacy

Recorded Output Measures

Which library visits should we count for Information Literacy?

Count all library visitors, but especially those obtaining new library cards and participating in library tours, bibliographic instruction courses, and computer literacy classes.

What are some examples of Information Literacy reference questions?

"We plan to buy a home next year. Can you show us how to search the Internet for real estate ads and mortgage lending information?"

"I am confused about how to set-up my home computer. Can you help me?"

"I am new to searching the World Wide Web. My searches all seem to pull up hundreds or thousands of web pages. Can you tell me how I might learn to limit my searches more effectively?"

What types of materials should be included in circulation, in-library use, and off-site delivery statistics for Information Literacy?

Include all materials designed to assist library users in locating information, such as abstracts, indexes, and bibliographies.

What types of on-site and off-site programs should be counted for Information Literacy?

Include on-site programs such as library tours and classes on using resources available only at the library. Include off-site programs such as computer literacy, database searching, and web development classes held at local schools, businesses, and community centers.

Which web page hits, views, or user sessions should be counted for Information Literacy?

Include statistics for any web pages designed to instruct or assist the public in using library resources, both print and electronic. Examples: a map of the library, a tutorial on searching the library catalog, instructions on how to focus Web searches.

Which uses of CD-ROMs should be counted for Information Literacy?

Likewise, include any uses of CD-ROMs designed specifically to address Information Literacy topics as described above. Example: a CD-ROM that facilitates website development.

Observed Activity Measures

What kinds of Information Literacy activities can be observed at service desks?

Count all individuals observed at service desks who are receiving answers to directional questions, assistance in searching the library catalog or conducting Web searches, or other help in using the library.

What types of Information Literacy events might library users be observed attending?

Information Literacy events may include: library tours, bibliographic instruction or computer literacy classes, or courses on researching specific topics.

When would observing a library user in the stacks count as an Information Literacy activity?

For purposes of this study, it would be helpful to identify specific areas in the library stacks where Information Literacy materials are located. These materials include reference materials such as abstracts, indexes, and bibliographies as well as materials on specific topics like computer literacy and the Internet. Only users observed in areas where these types of materials are concentrated should be counted.

What types of interaction with others at the library should be counted as an Information Literacy activity?

Include library users consulting with staff, conferring with each other, and meeting informally in groups, either in general reading areas or in any small meeting spaces that may be available for such ad hoc gatherings. Example: a library user receiving one-to-one assistance from a staff member or another user.

When should a library user observed reading or writing be counted as an Information Literacy activity?

Include anyone observed reading or writing near stack areas where Information Literacy materials are concentrated. Example: someone examining an index or bibliography or reading a how-to book about Web searching.

When should someone using a computer be counted as an Information Literacy activity?

Include anyone using the library catalog, a licensed database, or the Internet.

When would someone viewing a display count as an Information Literacy activity?

Include anyone observed viewing displays on Information Literacy topics such as those described above.

When would someone viewing or listening to audio-visual materials (books on tape, videos, DVDs) count as an Information Literacy activity?

Include users observed at viewing/listening stations when it can be determined that they are using Information Literacy a-v materials, such as a video profiling special collections of the Library of Congress or addressing ethical issues in Internet use.

Local History & Genealogy

Recorded Output Measures

How should we count visits to the Local History and Genealogy area?

Most libraries that identify Local History and Genealogy as a service response dedicate a specific area in their facilities to this function. This area houses the primary sources on this topic. For most such libraries, therefore, it should be relatively easy to count user visits to this specific area of the facility.

What are some examples of Local History and Genealogy reference questions?

"I'm just beginning to work on my family history. How should I begin?"

"Does this library have an alphabetical index to the 1860 Census for this county?"

"Where and how can I obtain genealogical data that has already been compiled by others for my family?"

"Are there any websites on the genealogies of Presidential families?"

What types of Local History and Genealogy materials should be included in in-library use and interlibrary loan statistics?

Most libraries identifying this service response classify local history and genealogy materials separately from their other collections. So, it should be relatively easy to count in-library use. Such materials are usually not available via interlibrary loan except as in photocopy form.

What types of on-site and off-site programs should be counted for Local History and Genealogy?

Include library-sponsored programs on how to trace a family's pedigree and keep family records as well as those on specific racial, ethnic, and national groups; particular types of public records, such as vital statistics, wills, and land records; and private documents, such as diaries, journals, photographs, and letters. Report all library-sponsored programs on these topics whether they occur on-site or off-site.

Which web page hits, views, or user sessions should be counted for Local History and Genealogy?

Include statistics for any web pages designed specifically to address Local History and Genealogy topics as described above. Examples: links to genealogical websites, searchable databases of historical photographs or public records.

Which uses of CD-ROMs should be counted for Local History and Genealogy?

Likewise, include any uses of CD-ROMs designed specifically to address Local History and Genealogy topics as described above. Examples: a CD-ROM on how to organize and maintain family records or preserve old photographs.

Observed Activity Measures

What kinds of Local History and Genealogy activities can be observed at service desks?

Count all individuals observed at the service desk in the Local History and Genealogy area. Such users might be asking a reference question, obtaining assistance in conducting an Internet search, checking out a reference item to which access is restricted, or requesting assistance with a photocopier or microfilm reader.

What types of Local History and Genealogy events might users be observed attending?

Local History and Genealogy events include tours of the LH&G area, how-to classes, and guest lectures on LH&G topics.

When would observing a library user in the stacks count as a Local History and Genealogy activity?

As most libraries selecting this service response have clearly defined stack areas for Local History and Genealogy, it should be relatively easy to count users in the stacks. They may be browsing or locating a specific item.

What types of interaction with others at the library should be counted as a Local History and Genealogy activity?

Include library users consulting staff, conferring with each other, and meeting informally in groups, either in general reading areas or in any small meeting spaces that may be available for such ad hoc gatherings. Examples: someone receiving staff assistance in using a microfilm reader, a small group from a local genealogical society doing research together.

When should a library user observed reading or writing be counted as a Local History and Genealogy activity?

Count any individual observed reading or writing in the Local History and Genealogy area. Example: someone doing research alone.

When should someone using a computer be counted as a Local History and Genealogy activity?

Include anyone observed using a computer located in the Local History and Genealogy area. Example: someone searching the library catalog or using FamilySearch.

When would someone viewing a display count as a Local History and Genealogy activity?

Include those observed viewing all displays located in the Local History and Genealogy area. Example: a display of local or regional art.

When would someone viewing or listening to audio-visual materials (usually microforms) count as a Local History and Genealogy activity?

Include those observed at viewing/listening stations located in the Local History and Genealogy area. Example: someone scanning a reel of Census microfilm.

SECTION C. PALM PDA INITIALIZATION FOR IMLS PROJECT

Introduction to Palm PDA Usage

What is the Palm PDA and what does it do?

The Palm PDA is an electronic instrument commonly referred to as a personal digital assistant (PDA).

The Palm IIIxe runs a variety of common computer programs, such as a calendar, address book, calculator, and to-do list. For this project, the Palm PDA will be used to collect public library output data. The instrument was shipped to your library with two to four customized forms programs developed specifically to collect output data for this IMLS project. Questions about the types of data items to be collected by these forms programs were answered in Section B of this manual. The details on how to collect those data were also discussed in that section.

The PDA's overall functionality is more limited than traditional personal computers (PCs) at this time, although their functionality is increasing rapidly. This limitation is precisely what allows PDAs to be as small as they are. For example, the PDA has 8 megabytes of memory whereas your typical desktop probably has 64 or more megabytes of memory. Once library data are collected, the data will need to be transferred from the PDA to one of your library's own PCs. This data transfer will be done through a computer cradle (supplied) connecting the PDA to the PC. Once the data transfer to the PC has occurred, the data on the PDA will be automatically deleted so additional output data can be collected using the PDA.

Why are we using a Palm PDA?

Two types of output data are called for in this project: recorded outputs and observed activities. The recorded outputs are more specialized versions of traditional output measures. Data on observed activities will provide a snapshot of the many different ways people use public libraries without necessarily being counted in a traditional output measure. Because they are being collected for specific service responses, neither type of output measure can be collected easily without the aid of technology.

Recognizing this difficulty, this project employs Palm PDAs for the following reasons:

1. Collected data will be stored directly into an instrument from which the data is uploaded to a computer, eliminating the need for manual entry of data from a hand-written page.
2. Data collection will be standardized by using forms with pre-defined answers.
3. Data entry will be made quicker, easier, and more accurate.
4. By making data entry easier and quicker, it will be possible to collect more detailed and meaningful information than was possible before.

I'm not very familiar with Palm PDAs. Where can I get more information and how can I be sure I can do what is expected of me for this IMLS project?

You do not need to be a technology guru to use a Palm PDA. In conjunction with the "Handbook for the Palm III Handheld Series" book (hereafter referred to as the "Handbook") that you received with the Palm PDA, this supplementary instruction manual should provide you with all the information necessary to effectively use the Palm PDA to collect library data.

In order to take full advantage of the Palm PDA, you should read the entire Handbook. This will introduce you to all the basic applications that are available on the Palm as well as discuss interfacing your Palm with your other programs such as your library's e-mail program.

For those of you who may be less ambitious or have less time, you definitely do not need to read the entire Handbook in order to participate in this project. Chapter 1 of the Handbook will provide you with a basic introduction to using the Palm PDA if you have no experience using one. Pages 11 - 13 of Chapter 1 cover material that will be discussed in more detail later in this manual. Many of you may find using the calculator keypad most convenient while entering data for this project, but if you want to learn the Graffiti function to write numbers, see Chapter 2. You may also find it useful for other functionalities found on the Palm IIIxe. The remaining sections of the Handbook describe Palm PDA functionalities that may or may not be used during this project. This manual will refer you to the appropriate pages of those chapters as needed.

What is the overall data collection process that we will be undertaking with the Palm PDA?

You will be using the Palm PDA for collecting library data in two different settings:

- 1) You will observe what your library users are actually doing in your library and enter this "live" library data directly into your Palm PDA. These data correspond to the observed activities output measures.
- 2) You will tabulate and summarize certain other data (e.g., the number of library programs over a certain period of time) onto paper forms and then enter those data into your Palm as well. These data correspond to the recorded data output measure for each service response that your library selected.

After these data are collected on the Palm, regardless of whether it is the observed library activities output measures or the recorded data output measures, you will then transfer the collected data onto one of your local PCs via the Palm PDA cradle that we have provided to you. After successful transfer, the data stored on the PDA will be automatically deleted from the PDA but a copy of the data will now reside on the PC. We have provided you with a PC program that allows you to a) view the data files that you have uploaded from the PDA to your PC and b) export the data files on your PC into a comma-delimited format (.csv) file. You will then send the .csv data files to us in Florida either by e-mail or, if you prefer, by surface mail on floppy diskettes.

Setting Up the Palm PDA for First-Time Use

The Palm PDA you receive from us is programmed for your immediate use. Following are the main steps you will need to perform:

1. Choose a personal computer (PC) on which to run the supplied software.
2. Connect the cradle to the PC.
3. Install the Palm Desktop software on your local PC.
4. Install the IMLS-PDA data collection program on your local PC.
5. Run the IMLS-PDA program to make sure that your installation of the program was successful.
6. Collect some test data on the Palm PDA.
7. Upload the data onto your local PC to make sure that the communication between the PDA and the IMLS-PDA program has been set up correctly.
8. Export the test data from the IMLS-PDA program into a comma-delimited file.
9. Begin collecting data.

The following pages go into detail on how to perform each of the above steps.

There are a few libraries in this project that have supplied at least one of their own Palm PDAs for data collection. At any library volunteering a PDA, you will need to download the output data collection forms (programs) from your PC onto your PDA prior to collecting the test data in step 6. See page 47 of this manual to get specific details about how to do that.

IMPORTANT: The installation instructions assume that you are using a standalone computer and that you have complete authority to add and delete programs from that computer. That is the computing environment in which the installation instructions given below were developed. It is recommended that you find a computer that meets those two assumptions if at all possible.

If you cannot find such a computer, then most likely your library is running Windows NT or Windows 2000 or your computer is part of a larger computer network. In either of these cases, you should consult with someone from your information technology staff (e.g., network administrator, system manager) about these installation instructions BEFORE you attempt the program installation. That staff member should now how to modify the installation instructions given below so that the instructions will work in your computer environment. If you do have problems that local staff cannot solve, please e-mail Dean Jue at djue@geomarket-intl.com or call him at (850) 386-7308.

Step 1 through Step 3 Preliminary Set-up through Palm Desktop Initialization

In the first three steps, you will install on your personal computer (PC) the software that will enable your PDA and the PC to communicate. These steps are common to almost all Palm PDA installations.

To complete these steps:

1. Choose the computer on which you want to install the Palm Desktop software. The following information may help you choose the best PC:
 - a) The Palm PDA cradle requires a dedicated port. This means that the plug for the cradle must be connected at all times. You cannot alternate between the Palm cradle part of the time and a serial mouse at other times.
 - b) The PC must be running Windows 95, 98, 2000, or NT 4.0 and have a 486 processor or better. A minimum of 8 megabytes of memory is required but 16 megabytes is recommended. There must be at least 20MB of hard disk space and the computer must have a VGA monitor or better. Finally, you will need a mouse and a CD-ROM drive on the computer to load the software. In order to get the collected library data to us, the PC must either be capable of being connected to the Internet or have a 3.5-inch diskette drive.
 - c) Although it is not required, you may wish to use a computer that has Microsoft Access 2000 installed. The data that are uploaded from the Palm PDA onto your PC are placed in Microsoft Access 2000-compatible tables. Although you should not need to view those tables directly, your ability to do so may be useful for troubleshooting if you run into problems.
2. Turn off the computer onto which you are going to load the Palm Desktop software.
3. Take the cable end of your PDA cradle and plug the cable into either the 9-pin serial (COM) port or the USB port on your computer, depending on the connection type you requested from us. See pages 11 through 12 of the Handbook for an illustration of plugging a cradle into a COM port. See page if you have a USB connection for your PDA. Leave the Palm PDA out of the cradle for now.
4. Turn on the computer. After the computer has finished initializing (booting), take the Palm Desktop Software CD-ROM out of its blue and gray protective cover; and insert it into the CD-ROM drive.
5. When the Palm Desktop Installer Menu window appears, click on the Install button (the top button) to begin the installation procedure. If the Installer program does not start automatically, click on the Windows Start button and select Run from the fly-up menu. Browse, if needed, to your CD-ROM drive and select the autorun.exe file. Click on OK to begin the installation procedure and then click on the Install button on the Palm Desktop Installer Menu window as instructed above.

6. Follow the on-screen instructions to complete the installation. Choose a typical setup. At this time, depending on your computer configuration, you may be asked whether or not you want to link your data with a non-Palm application such as Microsoft Outlook. Choose to synchronize only with the Palm Desktop software. We may not be able to duplicate problems you may encounter in running our application as a result of your Palm PDA synchronizing with other outside applications.
7. You will then be instructed to place the Palm PDA into the cradle. Do so and click on the OK button. Prior to shipping of the Palm PDA, we have already assigned a unique user name to your Palm PDA. We needed to do this in order to be certain that we can uniquely associate the data sets that we receive from you with your library outlet. Your user name is:

Each participating library system has been assigned two unique names. The first name is the one that has been used for the PDA we provided you. The second one is available for your use should you procure a second PDA for use in this project.

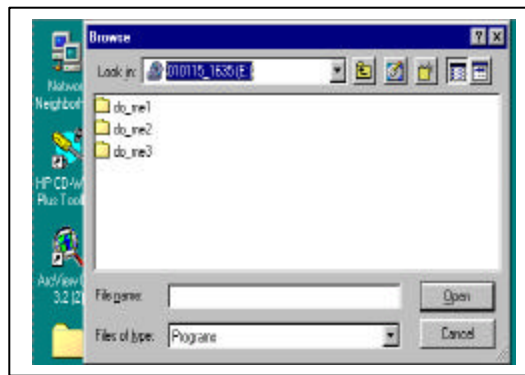
8. If communication was successful between the Palm PDA and your personal computer (PC), the Palm Desktop software will be copied onto your PC. You may choose to register your Palm online, but this is not required for the project. When you are asked about setting up your mail, cancel setting mail up for now. You may choose to do this later.
9. The setup procedure will run to completion. If you have Windows 95/98, the final screen may tell you that you need to reboot your computer. If so, please do so now. After rebooting, the first part of the installation will be completed.

Step 4 through Step 5 IMLS-PDA Program Installation and Testing

These steps will insure that the software we have provided to you is functioning and operating correctly on your personal computer (PC). There are two software programs that you will be installing. One is a program that handles the communication and transfer of library data between your Palm PDA and your PC. This program puts the library data uploaded from the PDA into a file named lib_data.mdb (a Microsoft Access 2000 file) that resides on your PC. The other program is a Visual Basic application that allows you to view the data in lib_data.mdb and then export the data into a comma-delimited file that can be readily sent to us.

To complete these two steps:

1. Put the CD-ROM entitled "IMLS Project" into your CD-ROM. Click on the Windows Start button (usually in the lower left hand corner of your Windows desktop) and select Run from the fly-up menu. Browse if needed to your CD-ROM drive. Alternatively, you can do this using your Windows Explorer program.
2. The Browser window (or Windows Explorer window) will show three Windows folders, entitled do_me1, do_me2, and do_me3. Choose the do_me1 folder.

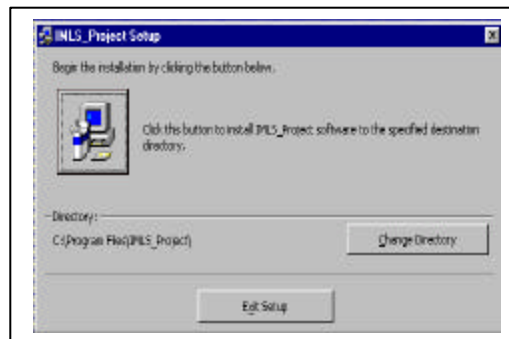


In the do_me1 directory are three files named dcom95.exe, dcom98.exe, and mdac_typ.exe. Depending on what Windows operating system you are running on your PC, perform one of the following steps:

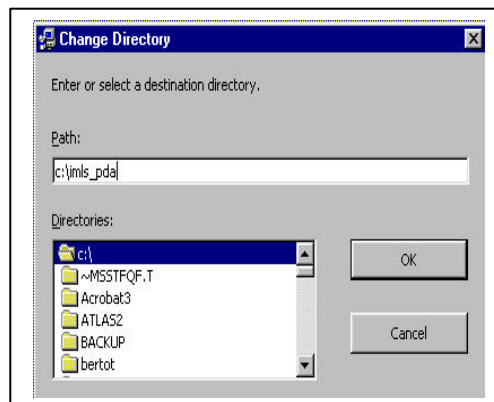
- a) Windows 95 - run the dcom95.exe program by double-clicking on the icon. After completion, you may be told to re-boot your computer. After the re-boot, repeat the first step above, go back to the same directory and run the mdac_typ.exe program by double-clicking on that icon. Again, you may be told to re-boot your computer.
- b) Windows 98 - run the dcom98.exe program by double-clicking on the icon. After completion, you may be told to re-boot your computer. After the re-boot, go back to the same directory and run the mdac_typ.exe program by double-clicking on that icon. Again, you may be told to re-boot your computer.
- c) Windows NT/2000 - you do not need to run any of these programs in the do_me1 folder. All the Windows components installed by these programs are already installed on these two operating systems.

Counting On Results Instruction Manual

- After you are through running the files in the do_me1 folder, click on the Windows Start button and select Run from the fly-up menu. Browse if needed to your CD-ROM drive and to the do_me2 folder. You are going to install the PC program that allows you to view and export the data collected by your Palm PDA. In the do_me2 folder, select the setup.exe file, click on Open in the Browse Window, and then on OK in the Run Window to begin the program installation process.
- An Install window will open and state that it is "Copying Files, please stand by." After the files are copied, you will get an IMLS_Project Setup screen. Follow any on-screen instructions you may get until you are told "Begin the installation by clicking on the button below." See the figure below.



- Before continuing the installation, click on the Change Directory button on the right-hand side of the window. Change the installation directory to "c:\imls_pda" in the Change Directory window by typing the directory in the Path: line and clicking on OK. See the figure below. Accept the option to create the directory when asked.



- After you change the directory, continue with the installation by clicking on the "Click this button..." button in the window. Accept the default Program Group (which is IMLS_Project). Depending on the speed of your computer, the installation can take from one to ten minutes.
- After this first program installation is complete, click on the Windows Start button again and select Run from the fly-up menu. Browse if needed to your CD-ROM drive and to the do_me3 folder. You are now going to install the program that controls the communication between your Palm PDA and your

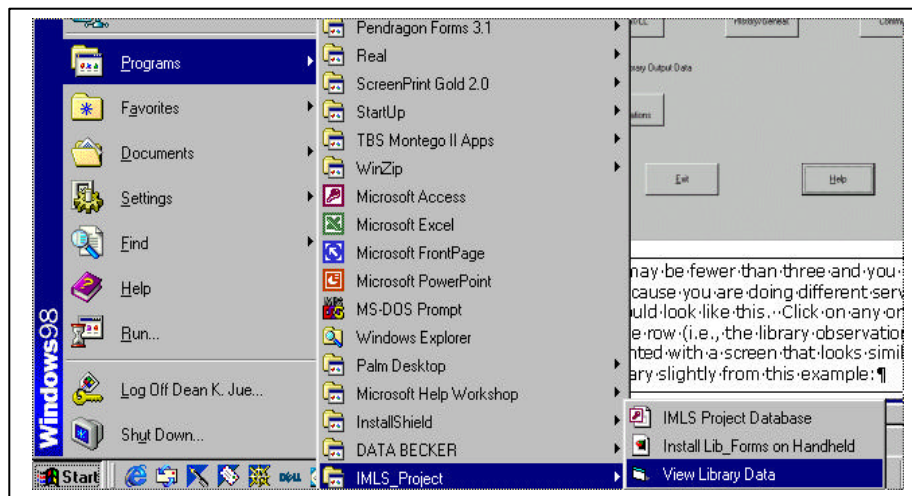
Counting On Results Instruction Manual

local PC. In the do_me3 folder, select the setup.exe file, click on Open in the Browse Window, and then on OK in the Run Window to begin the installation process for this program.

8. An InstallShield Wizard Self-extracting .exe window will open and ask you to click on Next to continue. Do so. Then read and accept the defaults for the next few screens, which includes the license agreement. At the end of the installation, after clicking on Finish to exit the wizard, you will be told you need to re-start your computer. Do so now.
9. The complete IMLS project program should now run. You are going to test the installation by accessing the database file that has already been installed on your computer during the setup process, view the records in that database file, and export the test records into a comma-delimited format file.

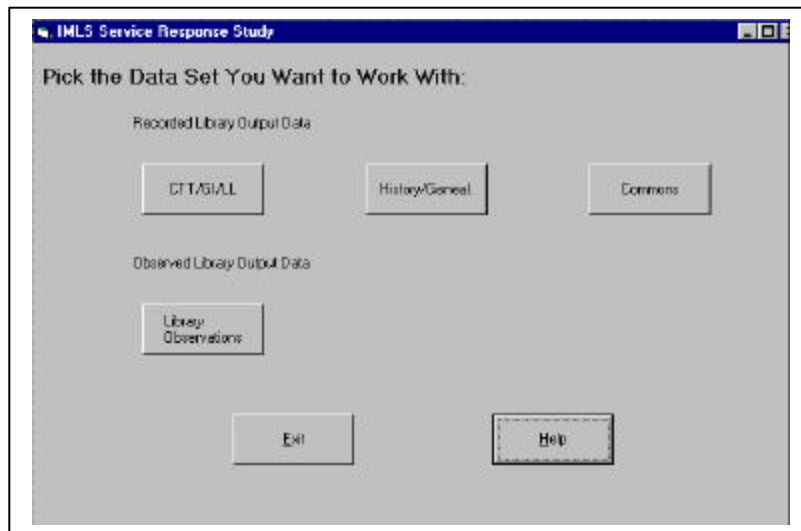
To do this, you can either:

- a) use Windows Explorer to navigate to the c:\imls_pda directory and click on the IMLS_Project.exe file icon there; or
- b) click on the Windows Start button (usually in the lower left corner of the Windows Desktop), select Program and then IMLS_Project from the fly-up and fly-out menus, and select the View Library Data option. See the figure below.

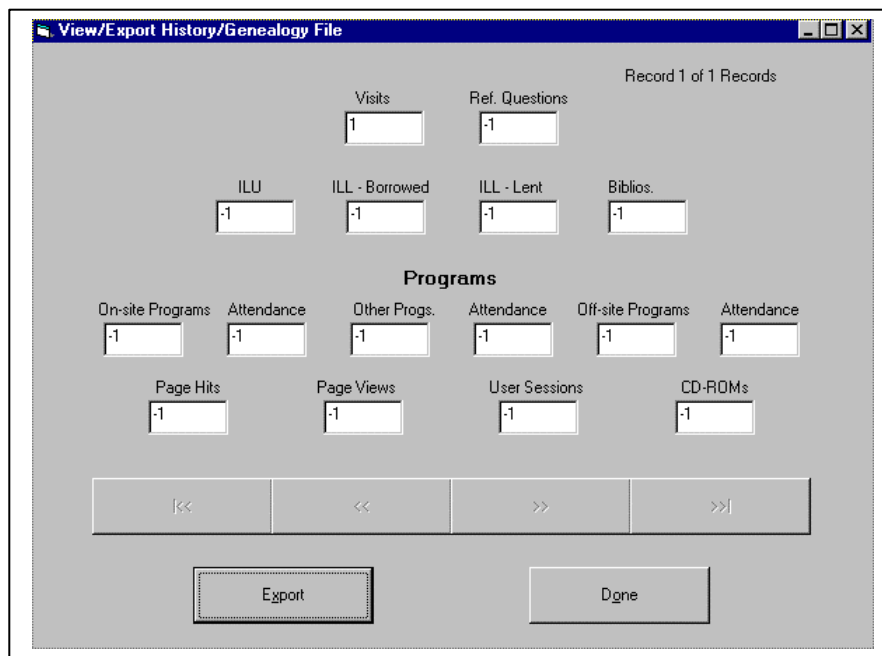


Counting On Results Instruction Manual

10. Regardless of the method you used to start the program, you should get a window that looks similar to the following:



The top row of buttons may be fewer than three and you may have different labels on the buttons because you are doing different service responses, but generally the screen should look like the above figure. Click on any one of the buttons in the top row (recorded library output data) or the middle row (observed library output data). If you do so, you should be presented with a screen that looks similar to the following screen. Again, it may vary slightly from this example:



11. You can use the four directional buttons immediately below the data fields to go from one record to the next. If the directional arrows are a very pale light gray, it means that that selection is not valid (e.g., there is only one record so there is no other record to move to in the database).
12. Export the records from one of the files you are viewing by clicking on the Export button. You will be prompted for a file name. Accept the default file name and click on SAVE. The program should tell you the export has been successful. If you click on the button for the same file from the original opening screen again, you will get a message that there are no records to list or export.
13. Finally, click on Exit on the main screen to exit out of the program. Use your Windows Explorer program to maneuver to the c:\imls_pda directory. You should see a new file with the file name extension .csv that you just exported. If you had no problems performing these functions, the Visual Basic program is working on your computer. If you had any problems, see the Troubleshooting guidelines on page 49.

Step 6 through Step 8 Testing Palm and PC Communication

The final steps before you start collecting real library data is to make sure that communication between your PDA and your IMLS program is functioning properly. To do so:

1. Collect some test data on your Palm PDA. See pages 8 through 31 for the detailed instructions on how to collect the library data and pages 52 through 59 for information on to enter the data into the Palm PDA. For now, you can enter some random data into each of the program (forms); just be aware that it's not real data yet.
2. Upload the data onto your local PC to make sure that the communication between the PDA and the IMLS-PDA program has been set up correctly. To do this, simply place the PDA into your cradle, make sure both the computer and the Palm PDA are turned on, and push the HotSync button at the base of the cradle. If everything is turned on and working correctly, the program you installed should automatically transfer the data from your Palm PDA onto your local PC and delete the data that you had just collected onto the Palm PDA at the same time. The progress of this data transfer will be displayed on both the Palm PDA and on your local computer. If this does not happen, see the Troubleshooting section on page 49.
3. Start the IMLS project program as you did before on the previous page, view the test data you just collected on your PC, and then export the test data from the IMLS-PDA program into a comma-delimited file as before. If this all works as described, you are now ready to begin collecting real-live library data! (Be sure to export all the test data out of each of the files in the database. Then delete all the .csv files from your c:\imls_pda directory on your computer prior to collecting real-live data so that you do not get confused between your test data and your actual library data.)

Uploading Library Data to Your Computer

The Palm has limited processing capabilities. In order to send your collected data to our site for data analysis, you will need to transfer the data (i.e., upload it) to your local personal computer (PC) as described in this section and then have it sent to our data processing site as described in the next section.

How often should I upload data to my computer?

You should upload at the end of every day that you collect data (or on the next day before collecting additional data). This will minimize the chance of lost data as well as ensure that the PDA is properly collecting data. If you collect data for several days before uploading data and there is a data collection problem, you will lose several days of effort rather than just one day.

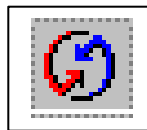
How do I upload the data to the computer?

To upload the library data collected on your PDA to your computer, simply make sure both the computer and the Palm PDA are turned on, place your Palm PDA into the cradle that is connected to the PC, and just press the HotSync button on the cradle. The data files you collected on the Palm PDA should automatically be uploaded to the PC and there will be messages on both the Palm PDA and the computer showing the progress of the upload and when the data transfer (the HotSync procedure) is completed. The next section describes viewing the uploaded PDA data on your PC.

Help. There is no communication between the computer and the Palm PDA?

One of the first steps in the software setup instructions was to ensure that there is communication between the computer and the Palm PDA. Please make sure that you have performed those steps before going any further (pages 35 – 36).

If you get a message “Connecting with the desktop” on the Palm PDA and nothing else happens until you get the message on the PDA that the connection between your handheld computer and the desktop could not be established, make sure that the HotSync Manager is installed correctly and running. When it is running, there should be a red and blue icon in the icon portion of your screen (usually the lower right corner for most PCs). Refer to the Troubleshooting page to read about starting up the HotSync Manager.



HOT-SYNC icon

Assuming that you have tested the computer to Palm PDA communication earlier and that it was fine, then the communications port may have been reassigned. The HotSync Manager allows you to change the serial port from Comm1 to a different port such as Comm2. Try varying the communication port using the HotSync Manager.

If you still have problems, contact Dean Jue by e-mail at djue@geomarket-intl.com or call him at (850) 386-7308.

Exporting and Sending Your Data Files to Us

How do I export data from the PC's database once I've uploaded the Palm PDA data to it?

To export your uploaded Palm PDA data from the PC's database table (entitled lib_data.mdb in your c:\imls_pda directory) into files that can be easily transferred to us, perform the following steps:

1. Start up the IMLS_Project program. You can either do it from the Start button or from the c:\imls_pda directory as described in the project set-up section.
2. Click on the button for the file (e.g., library observations) that you wish to view and export.
3. When the View screen appears, scroll through the records using the arrow buttons to make sure that the data appear correct.
4. Click on the Export button. You may specify the directory for the exported file if you want but **DO NOT CHANGE THE DEFAULT FILE NAMES** except for the digit "1" as needed. The file name will depend on the data being exported, of course. These names are:

bas_lit?.csv	Basic literacy export file name
bus_car?.csv	Business and Career export file name
commons?.csv	Commons export file name
cttgill?.csv	General Information export file name
info_lit?.csv	Information Literacy export file name
lib_obs?.csv	Library observations export file name
his_gen?.csv	Local history and genealogy export file name

The "?" represents the number that you provide, with the default "1" being the first exported file in that category, "2" being the second, etc. For example

First exported file for library observations:	lib_obs1.csv
Second exported file for library observations:	lib_obs2.csv
Third exported file for library observations:	lib_obs3.csv
etc.	

How do I get the exported data to you?

After you have exported the files, assuming you accepted the default data directory, you should be able to see a list of your exported files with the .csv extension in your c:\imls_pda directory.

The preferred and simplest way for you to get the files to us is to send them to us via e-mail. You can send the files either as attachments or, if you prefer, as in-line text. If you send it as in-line text, please limit it to one exported file per e-mail

Counting On Results Instruction Manual

message, with the exported file name being provided in the e-mail's subject heading. You can use Internet Explorer, Netscape Navigator, or any similar Internet browser. Send the file to djue@geomarket-intl.com.

If you do send the files to us by e-mail, please do NOT delete or remove the data files from your local computer until you have received a e-mail back from us confirming that we have received your files and that they are readable. If you need the space, please back-up your data files onto a diskette first before you delete those files from your system.

If you do not have Internet access (or if you prefer), you may copy the exported data files to a 3.5" disk using Windows Explorer. Send the disk in a padded envelope to:

Dean K. Jue
GeoMarketing International, Inc.
3455 Dorchester Ct.
Tallahassee, FL 32312-1300

Will I get a report on the data files that I send to you?

Yes, you will. Within a few days after you send us a data file by e-mail, you should get an e-mail back from us stating that we received that file in good working order.

When the mid-term outcome survey reports are prepared in mid-April (see Section D of this instruction manual), you will also get a report showing your cumulative count to date of all your service response(s) and your library observations.

Changing the Batteries

How do I know when I need to change the batteries?

On the main menu screen (the Application Launcher screen) of the Palm PDA, there is a battery gauge icon at the top center of the screen. The black color (left portion of the battery icon) represents charged and the lighter gray color (right portion of the battery icon) represents not charged. If the battery icon is less than 10 to 15 percent black, it is time to change the battery. The stored data may be lost if the battery power drops to zero. See page 190 of the Handbook for a detailed discussion about battery life.

How do I change the batteries?

Refer to page 10 of the Handbook. You will need 2 "AAA" batteries. Note that these are "triple-A" batteries, not the much more commonly-used double-A batteries. Please be sure to read page 190 of the Handbook before you attempt to change the batteries.

PalmConnect USB Kit

Many of the library systems participating in this project have requested a USB connection between their Palm PDAs and their computer. We have complied with that request whenever possible.

For those libraries with USB connectors, the instructions on pages 5 and 6 of the pamphlet entitled "PalmConnect USB Kit" that we provided to you supersede the instructions given on pages 35 through 36 of this instruction manual.

Remember that Step 7 on p. 36 of this manual gives the list of valid user names for your Palm PDAs that will be used during this project.

Libraries with Volunteered Palm PDAs

Some libraries in this study have their own Palm PDAs that they have volunteered to use during the course of this study. The discussion in this section pertains only to those libraries.

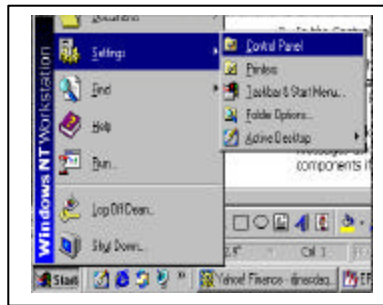
Even if you have volunteered one of your own PDAs for this study, you are still receiving a new one as part of this study. The steps you will be taking that are different from the other libraries without a volunteered Palm PDA are:

1. Most likely, you will already have the Palm Desktop installed on your PC. Therefore, you can probably skip Steps 1 through 3 on pages 36 through 37. Be sure to note the list of valid PDA user names for this project on pages 36 though.
2. Complete the remaining steps on pages 37 through 42. Use the Palm PDA we are providing you to test the Palm PDA – PC communication.
3. Prior to receiving this package and instruction manual, you should already have been contacted about the user names of your own Palm PDAs that you will be using in this project. These user names should already be listed on page 36 of this instruction manual and be in the IMLS_Project program database as a valid device for inputting library data. If this is NOT the case, please e-mail Dean Jue at djue@geomarket-intl.com and send him a list of the user names for the Palm PDAs you will be using in this project. He will send you a new CD-ROM that will fix this problem.
4. The only remaining thing you will need to do to use your volunteered PDAs is to put the IMLS_Project program (a .prc file) on your own Palm. To do so, turn to page 51 of this instruction manual, "Re-Initializing the Palm PDA." Simply follow steps 3 through 5 on this page for each of your own PDAs and your PDAs should be ready to use. The user name that will be selected correspond to those of your own PDAs. Those names should automatically be listed because the IMLS_Project program picks the list of user names to display from the HotSync Manager's list of PDA devices (assuming you were already HotSyncing data between your PC and your Palm PDAs before this IMLS Project began).
5. Remember that you need to HotSync your PDA two times before you will see the names of the forms on your PDA, as pointed out in Step 5 on page 51. The first HotSync puts only the IMLS_Project program on your PDA. This program has to be present before the library data collection forms can be downloaded on the second HotSync.
6. If you encounter any problems, please contact Dean Jue at djue@geomarket-intl.com or call him at (850) 386-7308.

Removing And Un-Installing The IMLS Application

At the end of your library's participation in this project, you may wish to remove the IMLS application from your computer. Alternatively, you may be asked to do this in order to re-install the application as part of the troubleshooting process. The steps for doing this are:

1. Because of Windows file security processes that may be in place, perform the following steps from a freshly-booted system (i.e., one in which you have NOT previously accessed any of the IMLS_Project components).
2. Click on the Windows Start button (usually in the lower left corner of the Windows Desktop), select Settings and then the Control Panel option. Click on the Control Panel option. See the figure below.



3. In the Control Panel, select Add/Remove Programs.
4. Scroll down the lower list of programs until you come to IMLS_Project. This program will be listed twice. Click on either one of the IMLS_Project names and it will become highlighted. The Add/Remove button which was formerly a light gray will become a black color, meaning that you can now select that option. Click on the Add/Remove button.
5. The removal/un-installation script is automated. If you are asked if you are sure about removal of the program, click on Yes. You may also get some messages asking about shared files. It is generally safest to keep all shared file components if you are asked.
6. Repeat the above procedure for the second IMLS_Project listed.
7. From the Windows Explorer window, delete the c:\imls_pda directory folder. This is also necessary if you plan on re-installing the IMLS set-up program as well.

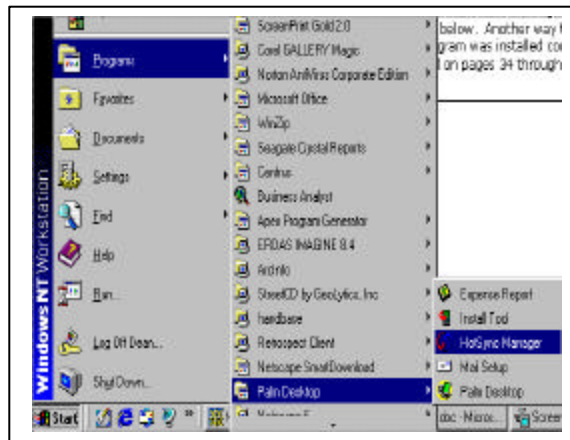
Troubleshooting

I am having some communication problems between my computer and my Palm PDA. What should I do?

Most computer and Palm PDA problems you are likely to encounter will show up during the initial set-up of the program. Therefore, it is important that you follow the procedures described on pages 34 through 42. If you can successfully go through all steps of the installation process, you will minimize the likelihood of computer and Palm PDA-related problems during this study.

If you do encounter such problems, try the following:

1. Is the HotSync Manager running? If it is, there should be a red and blue icon with arrows pointing towards each other in the icon portion of your Windows desktop (usually in the lower right corner of your screen). If it is not there, you need to start-up the HotSync Manager again. You can start-up the HotSync Manager from the Palm Program Group in the Programs fly-out menu. Simply double-click on the HotSync Manager name/icon in that program group. See the figure below. Another way to start up the HotSync Manager, assuming that the program was installed correctly at one time on your computer as described on pages 34 through 36, is to simply re-boot the computer.



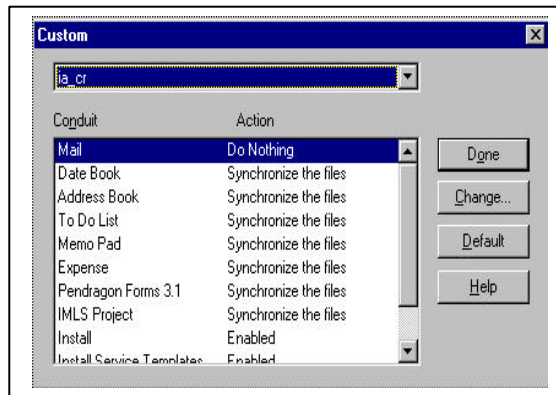
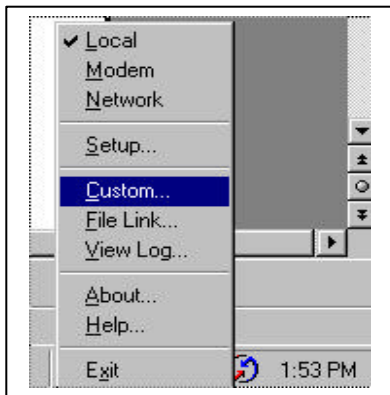
2. The user name for your Palm PDA must match that in the IMLS project's database in order for the data transfer (synchronization) to work. Use the stylus to tap on the HotSync icon on the Palm PDA's application screen. The upper right-hand corner of the HotSync screen displays the user name for the Palm PDA. See the following two figures.

Hot-Sync is the middle icon in the second row



For example, mt_bo is the user name for this PDA.

If you now click on the right button of the mouse on the HotSync Manger icon in the lower right hand corner of your screen, one of the options will be "Custom..." See the left figure below. Click on this option. In the window that appears, the top row is a pull-down menu. See the right figure below. Click on the right arrow to see the list of all the Palm PDAs user names that are valid for your computer.



The Palm PDA user name that appeared on the Palm Pilot's HotSync screen must be in this pull-down menu list on your computer for the data transfer program to work. The conduit list below each user name must also contain the words "IMLS Project" with an action of "Synchronize the Files."

If your Palm PDA's user name is not in the list, contact Dean Jue at (850) 386-7308 or by e-mail at djue@geomarket-intl.com.

If your Palm PDA contains actual library data that cannot be easily re-entered, the best solution is to remove the IMLS application (see page 47) and re-install the entire application (See pages 37 through 41). Then try HotSyncing the data again. If this still does not work, you should contact Dean Jue at the above number or e-mail address.

3. Try re-booting the computer again.

My Palm PDA is not responding to any input. What should I do?

If your Palm PDA is not responding to any input from either tapping the stylus on the screen or from pushing the buttons on the lower half of the Palm Pilot, please refer to pages 191 - 193 of the Handbook. This describes how to perform a soft or hard reset of the Palm PDA. After this you will need to do a re-initialization of the PDA. This is described on pp. 51.

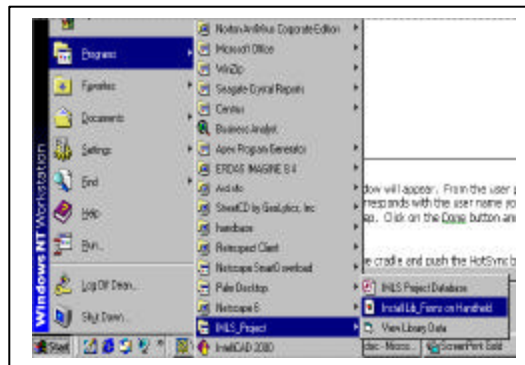
If a soft or hard reset of the Palm PDA does not fix the problem, you may want to try re-installing everything on a new (i.e., different) computer after a hard reset of the Palm PDA.

If none of the above works or is applicable, please call Dean Jue at (850) 386-7308 or e-mail him at djue@geomarket-intl.com.

Re-Initializing the Palm PDA

Your Palm PDA was sent with the IMLS software pre-installed on it. Should you do a re-set of your Palm PDA, you will need to re-install the Palm PDA with the appropriate forms collection software before you can collect library data again using your Palm PDA. To re-install the software:

1. First, you will need to re-set the date and time on the Palm PDA. Follow the instructions given on pages 23 - 24 of the Handbook.
2. Next, you will need to re-assign the user name to your Palm PDA. If your IMLS program is still installed on your local PC, all you need to do is place the Palm PDA in the cradle and push the HotSync button at the base of the cradle. The HotSync Manager on your local PC will realize that your Palm PDA has no user name and will ask you to specify one from a selection list. Select the appropriate name (i.e., one that is listed on page 36 of this manual).
3. Next, use the Start button and maneuver to the IMLS Project program group from the Programs fly-out menu. One of the options will be Install Lib_Forms on Handheld. Click on this option. See the figure below.



- A new Install Tool window will appear. From the user pull-down menu, select the user name that corresponds with the user name you just gave your Palm PDA in the previous step. Click on the OK button when you are finished.
4. Put the Palm PDA in the cradle and push the HotSync button at the base of the cradle. The program that resides on the Palm PDA for synchronizing the data transfer between the Palm PDA and your local PC will be downloaded to the PDA.
 5. After the above download is finished, immediately push the HotSync button a **second** time, still with the PDA in the cradle. The first download just downloaded the program. This second download puts the data collection forms onto the PDA.
 6. Your PDA should now be ready to use. Collect some test data and try sending those data up to your local PC as instructed on page 42. Remember to export any real data from the PC's library database before you send your test data up to your local PC. Also, remember to export the test data and delete those files from your PC before putting any real data into the database table.

COLLECTING LIBRARY OUTPUT MEASURES USING THE PALM PDA

Palm PDA Instructions for the IMLS Project

This section discusses the basic steps you need to know to use the Palm PDA to collect or enter output data. If you have not yet done so, please read Chapter 1 of the Handbook. Most of the chapter deals with Palm PDA set-up and basic terminology that you should know in order to utilize the Palm PDA effectively.

How do I start the Library Data Collection Program?

The program for collecting library data using the Palm PDA is called Lib_Forms. The program is on the main Application screen of the Palm PDA. Simply tap on the application Lib_Forms icon using your stylus and the program will start up. (Refer to pages 16 - 17 of the Handbook if you need more detailed information). See the sample Palm PDA screen below.



Which data collection forms do I use?

Once you start up the Lib_Forms program, your PDA screen will show a list of up to four different form names. Every library has a form named Lib_Activities_Form. This form is used to collect the library's observed activity output measures. There will be an additional one to three forms named as follows for each of the library service responses:

Basic_Literacy_Form	=	Basic Literacy
Business_Career_Form	=	Business and Career
Commons_Form	=	Commons
Gen_Info_Form	=	General Information
Info_Literacy_Form	=	Information Literacy
History_Genea_Form	=	Local History and Genealogy

Counting On Results Instruction Manual

These forms are used to enter the recorded output measures for your library. There should be one form for each service response your library has selected for this study.

How do I start collecting data?

First, select the form in which you wish to enter data. When the Lib_forms program is started at the beginning of a data collection cycle, the top form will be highlighted with a black background. See the example below. Simply tap on a different form name on the Palm PDA screen with the stylus to select a different form. The newly-selected form will then be highlighted with a black background.



Now just tap on the New button on the left-side of the Palm PDA screen just above the Application icon with your stylus.

The screens associated with each form will vary depending on whether you are collecting observed "live" library activities using the PDA or using the Palm PDA to enter your recorded output measures.

In the figure above, what does the checked "Auto" button do in the upper right-hand corner of the Palm PDA screen listing all the available forms?

The checked button helps speed up data entry and data collection on the Palm PDA. When the button is checked, the Palm PDA will automatically present you with the list of available options if it knows what those options are. And after you have selected your option, the PDA automatically goes to the next input screen.

For example, for all the recorded library output measures forms, the first screen will ask you for the time period covered by the output measures. The Palm PDA already knows the available choices are either "one day", "one week", or "one month." In the Auto mode, those choices are automatically listed on the Palm PDA screen. After you have selected one of those options by tapping on it with your stylus, the PDA will automatically go to the next display screen which asks you for the output measures on which you want to enter data.

If the Auto feature was NOT checked, you would be presented with the statement "Select one" with a down arrow key on the first screen. Only after you tapped on the "Select one" statement or the down arrow key with your stylus would you be presented with a list of the available choices. After you use your stylus to make a selection (e.g., by tapping on "One day"), you would then need to tap on the right-

pointing arrow key in the lower right portion of the Palm PDA screen before the form would advance to the next input screen.

The Auto feature affects the first screen of all the service response forms and first two screens of the Lib_Activities_Form.

How often should I use the forms for entering the recorded library output measures?

For the recorded library output measures forms, remember that the Palm PDA is just a convenient tool for you to enter data that have already been assembled elsewhere (e.g., from your automated library system report generator, manual checklists, etc.). Thus, there should be a MAXIMUM of one record per day, assuming that you wish to record and report to us all recorded library output measures for your library on a daily basis. More likely, you will want to provide us with weekly or monthly reports on many of the output measures.

Therefore, we anticipate that most data files that you send to us of recorded library output measures will contain just one or, at the most, three records. It will contain one record if you are reporting on just one time period (e.g., a monthly report). It may contain three records if, at the end of a month, you are combining a daily and a weekly report with your monthly report.

What are the forms in Appendix C used for in this study?

We realize that the data for the recorded output measures may come from many different sources. The forms in Appendix C will allow you to organize the data from those many different data sources into one convenient form prior to entering the data into the Palm PDA. These forms also allow you to have a paper copy of the data that you are sending us.

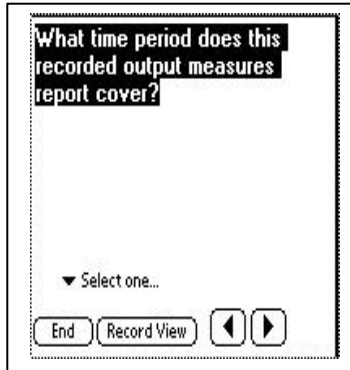
How are the recorded library output measures screens organized ?

For all of the recorded output measure forms for the six different service responses, there are basically three different types of screens. On the first screen, you enter the time period covered by the particular recorded library output measures you are entering. On the second screen, you identify the specific library measures for which you are entering data. The third and all subsequent screens are virtually identical except for the prompt requesting the specific value for the specific output measure.

The first two screens are designed to allow you maximum flexibility in reporting your recorded output measures. There are some recorded output measures for which you may wish to provide daily numbers (e.g., in-library use counts). In other cases, you may already have a procedure in place for providing monthly totals (e.g., attendance at library programs). By entering the appropriate information in these first two screens, you can provide us with custom reports on your recorded output measures for each of your service responses. You may provide us with daily tallies on some of the recorded output measures, weekly counts on some measures, and monthly counts on others. You should develop a consistent schedule for reporting each of the recorded library output measures.

Counting On Results Instruction Manual

The first screen for a recorded output form asks what time period the recorded output measure covers. If the Auto button is checked, a menu of your choices will automatically be displayed (i.e., one day, one week, or one month). If the Auto button is not checked or if the menu is missing, use the stylus to tap on the down arrow next to the phrase "Select one." Tap on your choice of time period using the stylus and then tap on the right arrow at the bottom right corner of the PDA screen to proceed to the second screen.

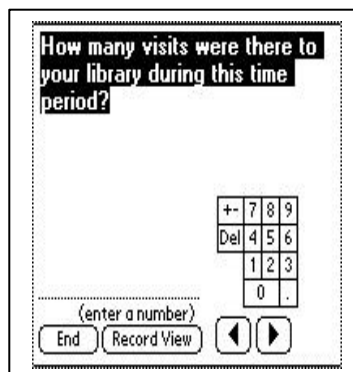


On the second screen, you identify the recorded output measures for which you are entering data for this particular session. Below the question on the PDA screen is a list of all of the recorded output measures for that particular service response. Note that the top option is "All of them." You can simply select this option if you are going to enter the data for all of the measures at the same time AND all those data cover the same time period. To select specific output measures, simply tap on the blank check box to the left of the output measure. If you accidentally check the wrong output measure, simply tap on the checked box again and the check will disappear.

If there are up- or down-pointing arrows in the right corners of the box of recorded output measures on this screen, that means that there are additional measures that are not being displayed on the screen. To access those output measures, tap on the appropriate arrow to scroll the list of output measures up (or down).

When you are through identifying the recorded output measures for which you will be entering data, tap on the right arrow in the bottom right corner of the screen to proceed to the third and any subsequent screens.

The third and subsequent screens asks you to enter the data for the specific recorded output measure(s) that you chose on the second screen along with a calculator-like keypad. See the example picture below.



How do I use the keypad to enter the data for each output measure?

Simply tap the stylus on the calculator key(s) that will “punch in” the appropriate numeric values you want. For example, tap the keypad number “1” twice to enter the value “11” if that is the appropriate data value for the output measure in question. Remember that the time period for which you are entering data should be the same for each output measure during each data entry session.

Points to keep in mind about the keypad are:

1. the “+ -” symbol cannot be used for addition or subtraction to calculate a net number. This particular key should not be used for this study except in very specific instances as described below.
2. use the “Del” button to backspace the cursor if you need to make changes to a number you have entered. Alternatively, you can move the cursor by tapping the stylus next a number you wish to change and then using the “Del” button.

When you are through entering the number, tap on the right-pointing arrow button at the lower right-hand corner of the PDA screen and you will be taken to the next recorded output measure for which you have data. When you are through entering data for all the recorded output measures you have selected, the program will return you to the main IMLS project screen, which is the list of all the available data collection forms on your Palm PDA.

How do I correct input errors on the recorded output measures form I am currently editing?

You can tap the stylus on the left-pointing arrow button in the lower right half of the Palm PDA screen to back up through the fields for which you are entering data until you come to the field that you wish to correct. Then use the calculator keypad as described above to correct the number and resume your data entry. You can use the right-pointing arrow button to go back to where you left off. Your previously entered data is still intact in the other fields unless explicitly changed.

If you discover that you left out a field for which you wish to enter data, you can use the same procedure just described to go back to the second screen that asks you to identify the fields for which you want to enter data. Just click on the check box for the appropriate field you now wish to include. As you tap on the right-pointing arrow button to go back to your previous data entry location, the newly included field will appear as you traverse the program.

If you discover that you have chosen too many fields and you do not need to enter data for one or two of those fields, your best option is to proceed through the list of output measures you have already selected and just enter the correct values where appropriate. When you come to the field in which you do not want to enter data, use the calculator keypad to enter the value “-1” (tap the “+ -” key with the stylus and then the number “1”). Then continue entering remaining values in appropriate fields. The value “-1” should be entered because - 1 means there is no data for this field and this is different from the value 0 (zero) which means there are no instances

of the particular activity occurring during the time period in question for this output measure.

If you decide you want to cancel the entire data entry process for this particular record for this form, enter the value "-9" as the value for any one of the fields in your recorded output measures and then use the stylus to tap the END button in the lower left corner of the Palm PDA screen. (The value -9 will signify to us, the IMLS researcher, that this is a record you want us to ignore.) You will be returned to the main IMLS screen with the list of available forms from which you may choose. Depending on your reason for canceling the data entry process, you can either re-choose the same form or a different form upon which to enter your data.

(NOTE: The END button procedure in the previous paragraph will work only if you are past the first two screens of the form. If you want to cancel the data entry process immediately after you start up a form, the best procedure is to enter any data you wish into the first two screens and then to just enter "-9" on the first data entry screen for an output measure.)

How can I view, change, or delete records I have already saved and entered into the Palm PDA?

Because of the small screen size of the Palm PDA, it is difficult to view, change, or delete an entire record on the Palm PDA itself. For viewing, we recommend that you upload the data onto your local PC and view each record in the IMLS_PDA program that we provided to you.

We have not programmed the ability for you to change or delete an uploaded PDA record in the IMLS_PDA program that we provided you. We would prefer that you let us, the IMLS researcher, take care of any needed changes or deletions during our processing of your data. You can explain any special circumstances about a data file to us at the same time as you send it to us in your e-mail.

(If you feel like you must change or delete a recorded library output measure record, one way to do it would be to upload the record to the PC (which would automatically delete it from the Palm PDA as well), export the file as you normally would into a .csv file, and then change or delete the record in the .csv file prior to sending the file to us. We recommend that you do this only in extenuating circumstances.)

How do I collect the observed library output measures using the PDA Lib_Activity_Form?

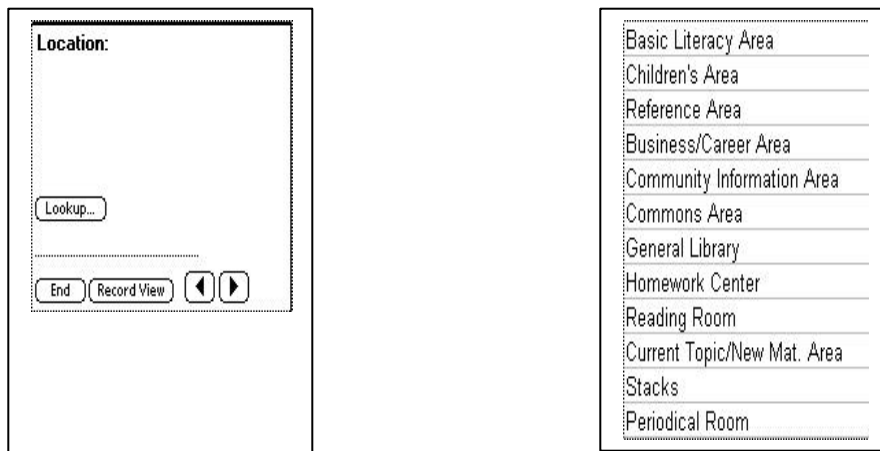
The procedure is essentially the same as for the recorded library output measures forms. Simply tap on the Lib_Activities_Form using the stylus. The form will then be highlighted with a black background. Tap on the New button with your stylus and the first data collection screen for this form will be displayed on the Palm PDA.

For the observed library output measures form, there are basically four different screens. On the first screen you enter information about the location in which an observed activity is taking place. On the second screen you enter information about the type of activity being observed. The third screen asks you to enter the age category of the user(s) participating in the observed activity while the fourth and any

Counting On Results Instruction Manual

subsequent screens are used to enter the number of participants in each of the age categories you checked in the third screen.

The first screen contains a look-up list. Look-up lists contain pre-defined answers from which you may select only one answer. After you start up the data collection program for this form, the Palm PDA screen will look like the one shown below on the left. After you tap on the Lookup button with the stylus, a list of possible library locations will be displayed on the PDA screen, such as that shown below on the right:



An up- or down-pointing arrow in the right corners of the location box means that there are more options from which you may choose. Tap on the appropriate arrow with the stylus to see more location options. Tap on the correct location name with the stylus. You will return to the same first screen as that shown above on the left but the dotted line just below the Lookup button will contain the code for the location you just selected. See Appendix D for a list of the location codes.

You are now ready to enter the data on the observed activity in the just-chosen library location. First, tap on the right-pointing arrow button in the lower right corner of the PDA screen. This will take you to the Activity screen, which will appear much like the previous Location screen except for the heading. Again, tap on the Lookup button with your stylus. A list of possible library activities will be displayed. With your stylus, tap on the activity field that best describes what you observed. You will be returned to the second screen and, again, the dotted line below the Lookup button will contain the code for the activity you just selected. See Appendix D for a list of the activity codes.

After the activity is selected, you are ready to enter the number and the ages of the people you observed in the observed activity at the given location. Tap on the right-pointing arrow button in the lower right corner of the PDA screen for library activities. The PDA will then display a screen asking what age groups were participating in the observed activity.

Use the stylus and tap the check boxes to the left of each age group that you observed in the given activity. Note that the top choice is "All Age Groups." You will probably pick this category just for large library gatherings (e.g., library programs). After you are through specifying the age group(s), tap on the right-pointing arrow button on the lower right of the PDA screen to proceed to the final screen(s).

Counting On Results Instruction Manual

The final screen(s) asks how many individuals of each particular age group were participating in the activity and displays a calculator-like keypad. This keypad will work just like it does for the recorded library output measures. Simply tap your stylus on the appropriate calculator key(s) to enter the number of individuals for the age group in question. There will be one screen for each age group that you checked during your answer to the previous question. After you are through entering the number, simply tap on the right-pointing arrow button in the lower right corner of the Palm PDA screen to proceed to the next data entry screen.

Because you will be collecting observed activities over a finite period of time (e.g., fifteen minutes each during a morning, an afternoon, and an evening hour), the Lib_Activities_Form is programmed so that after you enter the data for one complete location/activity/age group/number of individuals observation, the beginning of a new record is automatically displayed on the PDA screen again. This should facilitate quick collection of the observed library data. To exit out of this loop (i.e., to quit collecting observed library activities data), tap on the END button in the lower left corner of the Library Location PDA screen with your stylus (i.e., at the beginning of collecting a new library activity cycle). When you are asked if you want to "Delete this record?" tap on the YES button and you will be returned to the main IMLS Project screen.

SECTION D. COLLECTING OUTCOME MEASURES

The Questionnaires—Their Content and Development

What are the Planning For Results (PFR) service responses? Why are they being used in this project?

The PFR service responses, as outlined in the *Planning for Results Manual* (1998), are

- basic literacy
- business and career
- commons
- community referral
- consumer information
- cultural awareness
- current topics and titles
- formal learning support
- general information
- government information
- information literacy
- lifelong learning
- local history and genealogy

Public libraries provide so many services that it is impossible to come up with a one-size-fits-all survey patrons would take the time to answer. By organizing the study around the PFR service responses, we hope to be able to compare apples to apples. The service responses used in the study are the ones for which we received at least five library volunteers. Of the 13 original service responses, four were eliminated because too few libraries were interested in using them (consumer information, cultural awareness, and government information). Three were merged due to overlap: Current Topics and Titles, General Information, and Lifelong Learning. In addition, Commons and Community Referral were merged because of shared service elements.

What if my library is not doing PFR?

It does not matter. You may consider doing PFR in the future and you are probably already doing some sort of planning. The PFR service responses simply provide a structure.

Why does each questionnaire focus on a different service response?

We want to compare apples to apples. In other words, we want to compare the responses of patrons taking advantage of similar public library services.

Survey administration options

How can we set the stage for a successful outcome survey?

There are many ways this can be done, and what you do is entirely your choice. Some options to consider are

- A press release (see page 67)
- Handouts in the library (see page 68)
- Signage in appropriate areas of the library (see page 69)
- Staff training (see page 70)
- Links from your library's Web site:
 - To the online outcome survey at <http://lrs.earthnet.net>
 - To the Library Research Service's description of the project on <http://www.lrs.org>
- Announcements of your library's participation in the study at library-sponsored programs, seminars, and other presentations

Who do we ask to complete an outcome survey? (Do we choose them, or do they choose themselves?)

It is important to remember that this survey does not require a large, random sample. We need people who are using the service that you are studying to answer the survey. While it is fine for patrons to volunteer to answer a survey, we certainly recommend that you approach appropriate patrons and invite them to respond. Here are some examples for each service response:

Basic Literacy: You could approach a parent or child after a story session or talk with an adult learner after a tutoring session. This is one area where confidentiality must be weighed against the patron's ability to respond. It is acceptable for you to assist someone who would like to respond if literacy skills or a physical disability provide a barrier.

Business and career: You could solicit a response after working with someone on business and career-related items. If you are providing a class on how to use this collection it would be an opportune time to ask to respond.

Commons: If you notice patrons perusing your community bulletin board you could approach them. If there is a quiet reading and writing area you could have a tray with the paper surveys on one of the tables, accompanied by a sign on what to do with them.

General: This includes General Information, Current Topics and Titles, and Lifelong Learning. Just about anything goes here! If you are helping someone with readers advisory, helping a patron find travel books, providing computer assistance, or even moderating a book discussion group, follow it up by soliciting a survey response.

Information Literacy: Library staffs frequently help patrons use the computer, teach Internet classes, and understand reference books and databases. All of these would be excellent opportunities to solicit survey responses.

Local History and Genealogy: Do you have genealogy buffs who haunt your stacks? Are you teaching someone new to historical or genealogical research? Are you hosting a presentation on local history? All of these patrons would be good candidates to approach.

How often should we ask someone to participate in the outcome survey?

Obtaining 100 completed questionnaires (per service response) should not be too onerous a task for any library within the five month timeframe for this data collection. Given those parameters, obtaining one completed questionnaire per day would leave a library with time

to spare. More than likely, however, participating libraries may wish to involve at least some groups of users in this survey. For example, members of a personal financial planning seminar given as part of Business/Career Information services, members of the local genealogical society as part of Local History and Genealogy services. Inclusion of groups as well as individuals in the user outcome surveys is, indeed, encouraged.

For these reasons, participants can be very flexible about when they distribute user outcome survey questionnaires.

What can we say to encourage the patron to complete and return the outcome survey?

Just be polite, and discreet. Perhaps "Our library is participating in a nationwide study of library services, and I was wondering if you would be willing to take a minute to fill out a very brief survey. It is completely confidential, we do not need to know your name, and you can mail it in yourself (if using the postcard)."

May we include the outcome survey in a mass mailing?

Only if you are using the paper survey. The PDF version of the outcome survey is available at <http://www.lrs.org/COR/thepaperversion>. You are welcome to download it and make as many copies as you need.

May we give the outcome survey to a specific group?

Absolutely! This is a terrific way to target appropriate patrons for your service response. In fact, to maintain confidentiality, at the end of a presentation you may want to discuss the survey, then leave a stack with a pre-addressed and stamped envelope. One member of the group can be responsible for mailing the envelope.

Do you want the patron's name on the outcome survey?

Absolutely not! This is completely confidential. We are looking for patterns and trends, and have no need to connect a specific response to a specific patron.

Do you want the library's name on the outcome survey?

Yes! We definitely need the library's name. The postcards are coded, and the online version requires the respondent to select a state and a library. Respondents will need to write in the library, city, and state on the paper version (there are a lot of Carnegie Libraries!)

Which survey (i.e., service response) do we ask a respondent to complete? (How do we match patrons to service responses?)

If your library is doing two or three service responses, you need to target patrons who are involved in response-specific activities. See the samples above.

When do we use the postcard v. paper v. web version?

That is entirely up to you, although the pre-paid postcards should not be used for mass mailings. If you are talking with the customer on the phone or e-mailing patrons, you may wish to direct them to the URL of your link to the Web-based survey. If you are doing a large class you may wish to hand out the paper version. If you are working one-on-one with a patron it might be easier and faster to give the patron a pre-paid postcard.

It is a short questionnaire. Can we do it over the phone or by e-mail?

No, because that would eliminate the confidentiality factor. Really, the only times it is appropriate for you to assist the respondent is if literacy or physical disability presents a barrier. Otherwise, this is an excellent opportunity to point someone to the Web-based version. You might have an embedded link in your e-mail (see Appendix A for samples).

How can we publicize the outcome survey? Do we have to?

No, you do not have to publicize the survey. It should not be difficult to get a minimum of 100 completed surveys over a five-month period. However, the more data you collect, the better. Also, you might want to consider using your participation in this study as a public relations opportunity.

We are providing you with a model of a press release and a handout (see pages 67 and 68). Feel free to use them as is, in part, or to ignore them. You could also have signs around the library, and we have provided some ideas for these as well (see page 69).

You should definitely consider publicizing the survey on your Web page, and linking to the Web-based version of the surveys.

How does a respondent complete and return the outcome survey?

The patron can respond to the survey in several ways:

- Fill out the postcard and drop it in the mailbox
- Answer it online, which can be done from any Internet-accessible computer
- Fill out a paper survey, provide envelope and postage, and mail it. The paper survey also works well for group presentations. The library could provide one large stamped, pre-addressed envelope for all the attendees' responses.

Are we supposed to collect the outcome surveys and mail them back?

It depends. Remember, the respondent's confidentiality must be respected. If you have handed out the postcard the respondent should mail it back. If you are distributing the paper version to a large group you might want to consider asking one of the attendees to be responsible for mailing a stamped, addressed envelope that you provide.

How will we know how many outcome surveys have been completed?

We will provide monthly reports during the first four months and two reports during the last month. Otherwise, just ask us.

What can we do to increase the number of completed outcome surveys?

The first step is staff training. The staff involved with that service response should be familiar with the project, its scope and goals, as well as the survey. The more staff is familiar with the project, the better able they are to answer the public's questions and the more confident they will be in soliciting responses.

Send out the press release, put out the handouts around the library area served by the service response that you are studying, hand out paper surveys to groups, and just ask more patrons.

Who do we contact if we are having problems with the outcome surveys?

Just e-mail Keith Lance at keithlance@earthlink.net, 303-866-6900. If you are having difficulty with the Palm PDA technology and the output survey, you need to contact Dean Jue by e-mail at djue@geomarket-intl.com or by phone at 850-386-7308.

Is it all right for patrons to call you (LRS) with questions?

Yes, they can e-mail us or phone us if they want.

What if patrons want to say more than there is room for on the postcard?

Give them a paper survey, which will have more room, or direct them to the Web-based version, where they can enter lengthy text.

What do we do if we run out of postcards?

Use the paper surveys (PDF version available at <http://www.lrs.org>), direct patrons to the Web-based version, or call us. We will have some extras.

Survey results and reports

What reports will we receive and when?

Each participating library will receive an interim report of outcome survey results for each service response by April 30, 2001. These results will include a demographic breakdown and a comparison of your outcome survey results with those of other libraries dealing with the same service response.

A final report on outcome survey results will be delivered to each participating library by August 31, 2001. A copy of the complete project report will be sent to each library after the project concludes September 30, 2001.

How can we use the results from these surveys?

Remember, this study is really a pre-test of the collectability of this kind of data. This study involves a small sample of widely different public libraries. While the results will not tell you to increase spending by a specific amount, or alter hours on specific days, they will offer guidance on how to collect additional, more targeted data specific to your situation. These results will provide a model that you can then incorporate into your planning, budgeting, evaluation, and marketing.

How do the results from these user outcome surveys relate to the output statistics we collected with the Palm computer?

The Planning For Results process encompasses data on library resources (or inputs), services (or outputs), and impacts (or outcomes). To plan for or evaluate a library's services requires all three types of data. While each type of data is useful independently, the relationships between inputs, outputs, and outcomes also need to be explored. To begin with, however, this project seeks only to develop and to demonstrate the practicality of collecting outcome data from users. The relationship of this type of data to input and output data will be explored to the extent possible within the time and resource confines of this project, but that is not its primary purpose.

How and when can we contribute to the improvement of the surveys?

This project is concerned with the initial development of user outcome surveys. The data collection exercise undertaken by participating libraries is designed primarily to provide an opportunity to explore the issues involved in such data collection. What works? What does not work? Which survey items should be revised or dropped? What items are missing? The collective experience of these libraries will provide extensive input for the improvement of these surveys in their final form.

How can we use future versions of these surveys?

At the conclusion of this project, the user outcome surveys will become a regular feature of the LRS website, through which they will be available to any library wishing to use them as

Counting On Results Instruction Manual

long as interest and resources permit. From time to time, further refinements may be made based on the experience of participating libraries. Any library wishing to adapt the questionnaire items for a locally customized survey will be free to do so, though such customization cannot be supported extensively by the LRS.

Sample Press Release

FOR IMMEDIATE RELEASE
CONTACT: Your PR Person
Your phone number

(Anytown) You see them everywhere – in meetings, on elevators, walking down the street – people are flipping open their Palm PDAs to check their appointments, read their e-mail, find addresses, and count how many children are visiting storytime with their grandparents.

What's that? Palm PDAs in the library? You bet. The Anytown Carnegie Public Library, as part of its participation in a national, federally funded study, is keeping track of how many visitors are asking reference questions, using computers, checking out books, and much, much more.

What's more, the library wants to hear from you and find out what happens as a result of all that activity in the library. Did you get a job? Find an old roommate? Learn a new hobby? Write your state representative? There's a stack of easy-to-answer surveys that you can answer either online or the old-fashioned way—with a pencil! All information is confidential—no one will ask you your name, and you can mail the stamped, addressed survey in yourself.

Only 46 public libraries around the country have been selected to participate in the *Counting on Results* Study, sponsored by the Institute of Museum and Library Services. The Anytown Carnegie Public Library, as part of its ongoing effort to provide Anytown residents with the best service possible, hopes to use the results of the study to evaluate current planning and programming efforts.

Public library decision-makers are no longer satisfied with high numbers of service transactions—we want to know what difference our services make to you and the community. The *Counting on Results* project aims to create the tools needed to conduct this kind of measurement routinely and in a standardized way.

This research and demonstration project supplements the Public Library Association's new *Planning For Results* process, and supports other state and national efforts to promote library planning.

Sample Handout

The Anytown Carnegie Library is participating in a national, federally funded study of how and why people use public libraries, and with what results. (We're taking a close look at insert name of service response) We want to hear from you and find out what you're doing with what you learned at the library. Did you get a job? Find an old roommate? Learn a new hobby? Write your state representative? You can answer our quick-and-easy survey either online or the old-fashioned way—with a pencil!

For the online version click on (describe your library's link to the survey) on our Web site at (your Web site URL here). Or ask any library staff member for the postcard survey. All answers are confidential—you will not be asked for your name. In fact, you can mail the survey in yourself. It's a stamped, business reply postcard.

Public library decision-makers are no longer satisfied with high numbers of service transactions—we want to know what difference our services make to you and the community. The *Counting on Results* project aims to create the tools needed to conduct this kind of measurement routinely and in a standardized way.

Only forty-six public libraries around the country have been selected to participate in the *Counting on Results* Study, sponsored by the Institute of Museum and Library Services. This research and demonstration project supplements the Public Library Association's new *Planning For Results* process, and supports other state and national efforts to promote library planning.

Sample Signage

LOOKING FOR BUSINESS OR CAREER INFORMATION?

WE WANT YOUR FEEDBACK!

Please answer this quick survey.

All answers confidential

What's the library done for you lately?

Tell us!

Please answer this quick survey.

Staff Training: Sample Agenda

We encourage you to familiarize your staff with the goals and purpose of the Counting on Results study. Everyone should be able to answer the public's questions, and direct them to an appropriate survey – particularly if you are highlighting your participation on your Web site or through local publicity.

Suggested topics for staff training include

- ◆ Announcement of selection and participation
- ◆ History of project
 - *Planning for Results*
 - Interest in examining service responses in light of patron impact
- ◆ Scope of project
 - Diversity of libraries participating
 - Diversity of service responses being examined
 - Definition of an output
 - Definition of an outcome
- ◆ Introduction of tools
 - Palm
 - How to use it
 - How to collect the data
 - Outcome survey (postcard, paper, and online)
- ◆ Potential Goals

Glossary

Browsing – To explore, without design, the contents of a collection of books or documents

Circulation – Count of all materials in all formats that are charged out for use outside the library. Interlibrary loan transactions included are only items borrowed for users.

Document delivery - Physical or electronic delivery of documents from a library collection to the residence or place of business of a library user.

Hit - An action on a website, such as when a user views a page or downloads a file.

In-library use – Items removed from the shelf by customers and staff. An in-library use count includes the number of every type of physical item (periodicals, bound volumes, microfilm reel) reshelved.

Interlibrary loan (ILL) – Library materials, or copies of the materials, provided by one library to another upon request.

Library Visits - Total number of persons entering the library for whatever purpose during the year.

Outcome measure – A statistic that reflects the extent to which library services have had a measurable impact on the community. Such statistics answer questions such as “How has the library made a difference in the community?” and “How are the lives of customers better as a result of visiting the library?” In this project, outcome measures will be expressed as the percentage of responding customers identifying that the library met a particular type of need.

Output measure – A statistic that reflects the extent to which the library facility and the staff, collection, services, and programs it houses are used by the community. Many of these measures are expressed on a per capita basis (e.g., visits per capita, circulation per capita, reference questions per capita, program attendance per capita) or as percentages of successful searches (e.g., subject and author, title file rates).

Page view – Also called Page Impressions. Hit to HTML pages only access to non-HTML documents are not counted).

Programs (number of programs and attendance) - presentations your library held or sponsored. Programs may be bibliographic instruction, cultural, recreational, or educational. Attendance counts number of people of all ages who attended each kind of program.

Reference question – An information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The request may come in person, by phone, fax, mail, or email.

Visitor/user session - A session of activity (all hits) for one user of a web site. A unique user is determined by the IP address or cookie. By default, a user session is terminated when a user is inactive for more than 30 minutes. Synonym: Visit.

Bibliography

Himmel, Ethel and Wilson, William James. (1998). *Planning for Results: A Public Library Transformation Process, the Guidebook*. Chicago, IL.: American Library Association.

McClure, Charles et al. (1987). *Planning and Role Setting for Public Libraries*. Chicago, IL.: American Library Association.

Nelson, Sandra S. (2001). *The New Planning for Results: A Streamlined Approach*. Chicago, IL.: American Library Association.

U.S. Department of Education. (1998). National Center for Education Statistics. *Public Libraries in the United States: FY 1995*, NCES 98-301, by Adrienne chute and Elaine Kroe, National Center for Education Statistics and Patricia Garner and Regina Padgett.

Van House, Nancy et al. (1987). *Output Measures for Public Libraries: A Manual of Standardized Procedures, 2nd ed.* Chicago, IL: American Library Association.

Appendix A
Outcome Surveys

(Also available on the Web at <http://lrs.earthnet.net>)

BASIC LITERACY (learning to read and write)

How have the library's basic literacy services helped you?
Mark (X) all of the following that apply.

As a result of my recent use of the library, I ...

Improved my reading, writing, or math skills.

- Prepared for the GED test.
- Passed the GED test.
- Prepared for the naturalization (citizenship) exam.
- Became a citizen.
- Read to a child or helped a child choose a book to read.
- Helped a child do homework or improve grades.
- Applied for a job.
- Got a job, a better job, or a raise in pay.
- Started managing my personal finances better.
- Learned something I needed to know about using bus, buying car, education, health care, jobs, handling money, insurance, or child care.
- Participated in a community activity.
- Wrote a letter, postcard or e-mail message to someone.
- Other—please specify:

Demographic Characteristics

This information will help us to understand how people like you use the library and how to serve everyone better.

Gender

- Female Male

Age

- Under 18 18-24
 25-39 40-59
 60 or over

Education

- Less than high school
 High school graduate
 Some college
 College degree (bachelor's or higher)

If you have a success story about your use of the library or other comment, please share it briefly here (please print):

BUSINESS & CAREER INFORMATION

How have the library's business and career information services helped you? *Mark (X) all of the following that apply.*

As a result of my recent use of the library, I ...

- Explored new business options, started or developed a business (market research, financing, franchising, home business, self-employment, regulatory information, zoning).
- Dealt with a personnel issue (hiring, training, firing).
- Closed a business (sale, merger, bankruptcy).
- Explored jobs or careers, or determined necessary education or training.
- Developed job-related skills (resume -writing, interviewing, computer, or sales skills).
- Learned how to advance in job or career.
- Made career changes or relocated.
- Made better investment or retirement decisions.
- Other—please specify:

If you have a success story about your use of the library or other comment, please share it briefly here (please print):

Demographic Characteristics	
This information will help us to understand how people like you use the library and how to serve everyone better.	
Gender	
<input type="checkbox"/> Female	<input type="checkbox"/> Male
Age	
<input type="checkbox"/> Under 18	<input type="checkbox"/> 18-24
<input type="checkbox"/> 25-39	<input type="checkbox"/> 40-59
<input type="checkbox"/> 60 or over	
Education	
<input type="checkbox"/> Less than high school	
<input type="checkbox"/> High school graduate	
<input type="checkbox"/> Some college	
<input type="checkbox"/> College degree (bachelor's or higher)	

THE LIBRARY AS A PLACE (Commons)

How has having the library as a place helped you?
Mark (X) all of the following that apply.

As a result of my recent use of the library, I ...

- Met a friend or co-worker.
- Made a new friend.
- Learned about new books, videos, music, etc.
- Completed or made progress on school work.
- Learned about or was referred to another community organization.
- Had a quiet comfortable place to think, read, write, or study.
- Took a break at the library coffee shop or café.
- Enjoyed a lecture, concert, film or other public event.
- Attended or participated in a public meeting.
- Visited a library-sponsored chat room on the web.
- Other—please specify:

**Demographic
Characteristics**

This information will help us to understand how people like you use the library and how to serve everyone better.

Gender

- Female Male

Age

- Under 18 18-24
 25-39 40-59
 60 or over

Education

- Less than high school
 High school graduate
 Some college
 College degree (bachelor's or higher)

If you have a success story about your use of the library or other comment, please share it briefly here (please print):

GENERAL PUBLIC LIBRARY SURVEY

How have the library's services helped you?

Mark (X) all of the following that apply.

As a result of my recent use of the library, I ...

- Read for pleasure (bestsellers, biographies, current events, etc.).
- Obtained a specific fact or document I was interested in (a name, address, date, statistic, law or regulation, etc.).
- Learned more about a skill, hobby, or other personal interest (how-to/consumer information, cooking, car repair, genealogy, personal finance, etc.).
- Identified or contacted any organization (a school, social club, museum, historical society, political party, special interest group, etc.).
- Found information needed for school, work or a community group.
- Shared a cultural experience and/or exchanged information with others (book group, author lecture, film, other performance, etc.)
- Learned more about a legal, social or political issue (environment, civil rights, Social Security, education, military preparedness, etc.), or elections (local, state, or national).
- Met new people with whom I share common interests.
- Other—please specify:

If you have a success story about your use of the library or other comment, please share it briefly here (please print):

Demographic Characteristics

This information will help us to understand how people like you use the library and how to serve everyone better.

Gender

- Female Male

Age

- Under 18 18-24
 25-39 40-59
 60 or over

Education

- Less than high school
 High school graduate
 Some college
 College degree (bachelor's or higher)

INFORMATION LITERACY (knowing how to find what you want)

How have the library's information literacy services helped you? *Mark (X) all of the following that apply.*

As a result of my recent use of the library, I ...

Found what I was looking for ...

- using the library catalog.
- searching the World Wide Web.
- using databases.
- using reference books.
- because librarian helped me.

Learned how to ...

- use the library catalog.
- ask a library staff member for help.
- use a computer (keyboard, mouse).
- use standard software products (word processing, spreadsheets).
- use e-mail, electronic mailing lists, or chat rooms.
- evaluate the quality of information on the web.
- create a web site.

- Other—please specify:

If you have a success story about your use of the library or other comment, please share it briefly here (please print):

Demographic Characteristics

This information will help us to understand how people like you use the library and how to serve everyone better.

Gender

- Female Male

Age

- Under 18 18-24
 25-39 40-59
 60 or over

Education

- Less than high school
 High school graduate
 Some college
 College degree (bachelor's or higher)

LOCAL HISTORY & GENEALOGY

How have the library's local history and genealogy services helped you?
Mark (X) all of the following that apply.

As a result of my recent use of the library, I ...

- Learned how to use genealogical databases.
- Made progress researching family history.
- Met or was reunited with a family member or friend.
- Learned about family medical history.
- Learned about cultural heritage.
- Shared data with others in person, in print, or online.
- Published family history.
- Identified new source of information to search.
- Met others interested in local history or genealogy.
- Did research for a school project.
- Worked on historic preservation, renovation, or real estate.
- Learned about my community/local history.
- Obtained a document or record (photo, will, land record, map).
- Other—please specify:

If you have a success story about your use of the library or other comment, please share it briefly here (please print):

Demographic Characteristics

This information will help us to understand how people like you use the library and how to serve everyone better.

Gender

- Female Male

Age

- Under 18 18-24
 25-39 40-59
 60 or over

Education

- Less than high school
 High school graduate
 Some college
 College degree (bachelor's or higher)

**Appendix B.
Examples Of Output Measures For
Each Service Response**

Basic Literacy Sample Output Measures

(ESL; family literacy; tutoring; functional math skills; instructional media/tutoring software; meeting space for tutoring.)

RECORDED OUTPUT MEASURE EXAMPLES

1. **Reference Questions** - Literacy related reference questions

Examples:

"What materials can you recommend for my son. He is having trouble reading at his class level."

"I am tutoring a student in math, do you have fourth grade level materials?"

"I am a volunteer with Literacy America, which tables may I use on Tuesday afternoon, for tutoring sessions?"

"My family is recently here from Honduras, and we are trying to learn English. Can you help us?"

Do you have anything online that I can use on my own, to enhance my vocabulary?"

2. **Circulation**

Examples:

All formats of materials that circulate that address: learning and performing functional skills; learning English as a Second Language; high-interest/low vocabulary materials; or any other library service or product that supports developing reading, writing and arithmetic skills.

3. **In-library Use**

Examples:

Use of materials, or services (circulating and non-circulating) that support basic literacy as described under circulation.)

For example, those services or products ranging from online English language programs in the children's room to use of books in the children's room by immigrant parents, to workbooks and controlled vocabulary texts specifically designed for literacy programs, or simply reading magazines or newspapers to learn English. Any use of materials and online resources in the library that promote basic literacy skills, either computer-based or computer assisted,.

4. **Document Delivery** - This number would be recorded in ILL figures, probably could be best captured through title and classification information that represents basic literacy subject matter.

5. **Tutoring** - This use figure may be captured through possible sign up sheets for meeting space; experiential knowledge of staff of when tutoring takes place and by and with whom. This count would include only those people who attend tutoring sessions, not teachers.

OBSERVED LIBRARY ACTIVITIES EXAMPLES

a) **at the service desk** (the service desk can be described as circulation, reference, or information desk, self-service checkout)

1) ILL request and materials that support learning reading, writing and math

2) reference question requiring staff knowledge of literacy services and materials

3) directional question regarding location of literacy materials and services

4) reader's advisory on certain literacy related materials and service, such as high-low vocabulary books, ESL, or math or writing skills materials.

- b) **attending an event** (an episode, a *one time* happening)
 - 1) programs, i.e., special topics (improving functional skills); one time instruction, (how to become a library literacy volunteer)etc.
 - 2) use of meeting rooms, i.e., tutoring of any basic skill, teaching ESL, or for other literacy related group activity.
 - 3) library promotion or campaign, i.e., family literacy, summer reading club, etc.
 - 4) reception or gathering for a special purpose such as those graduating or receiving certificates for attaining certain levels of literacy

- c) **in stacks** (users perusing collection in the rows of shelved books and materials, including children's area of shelves)
 - 1) browsing, perusing collections and materials that support basic literacy
 - 2) any activity such as comparing documents, investigating several titles, chatting with a friend about the materials, that support basic literacy.

- d) **interacting with others** (any shared activity in the library between two or more users)
 - 1) reading to someone
 - 2) someone being read to
 - 3) tutoring someone
 - 4) someone being tutored
 - 5) one on one bibliographic instruction
 - 6) studying in a group
 - 7) doing homework in a group

- e) **reading/writing**
 - 1) person reading within any setting in the library (for purposes that can be discerned) to learn to read
 - 2) person writing within any setting in the library (for purposes that can be discerned) to learn to write
 - 3) person practicing functional math skills

- f) **using computer**
 - 1) searching databases for literacy-related programs
 - 2) word processing - learning to write a business letter
 - 3) mathematical calculations - practicing functional math skills
 - 4) self-instruction for increased basic literacy skills

- g) **viewing display**
 - 1) exhibits of literacy related materials, such as ESL, or literacy volunteer accomplishments
 - 2) bulletin boards - announcements of literacy events or class schedules
 - 3) kiosks - materials for promoting basic literacy materials or services

- h) **viewing/listening to A/V** (specific to media activities)
 - 1) videos on 'how-to' improve writing, reading or increase math skills
 - 2) books on tape on basic literacy, or ESL, or improving functional skills
 - 3) ESL tapes or CD-ROMS for self-instruction

- g) **other** (anything that you want to count that does not fit in the above)
 - 1) photocopying of basic literacy materials
 - 2) self-instruction on Internet on a specific database
 - 3) partnership literacy program with community agency

Business and Career Information Sample Output Measures

addresses a need for information related to business, careers, work, entrepreneurship, personal finances and obtaining employment. (*Possible service components: career guidance counseling; job placement service; public use computer equipment for preparing resumes; copy center; job development programs; WWW links.*)

RECORDED OUTPUT MEASURES EXAMPLES:

1. Visits to Business/Career (B/C) Area - all people entering the area which houses the primary sources for business and career information.

2. Reference Questions - Business and Career Information Related Reference Questions

Examples:

1. I am studying for the exam I have to take to get into the Army, do you have anything that I can look at that will help me?
2. My daughter is having trouble deciding on college or vocational training, do you offer any kind of workshops that could guide her?
3. I am opening a computer repair shop and want to learn more about the community so I can make a better decision about where to locate, and what to keep in stock, do you have any information like that?
4. I am supposed to bring a resume to my job interview tomorrow, and I have never written one, do you have an example?
5. Do you have any local job information on the Internet?
6. We just received a lump sum of money and want to invest it--do you have any information that would be useful?

3. B/C Circulation

Examples:

All formats of materials that address: career guidance counseling, job placement, resume writing, investing and types of employment, starting a small business.

4. B/C In-Library Use

Examples:

Use of materials, or services in the library (circulating and non-circulating) that support basic literacy as described under circulation.)

For example, all placement exam manuals for careers, military and other vocations.

Online computer programs offering business and career information of the same nature, including resume writing.

5. B/C Materials Lent (ILL) - Same as Circulation descriptors. This category may be useful to count by classification numbers and or titles.

OBSERVED LIBRARY ACTIVITIES EXAMPLES

a) **at the service desk** (the service desk can be described as circulation, reference, or information desk, self-service checkout)

- 1) checking out Business and Career/Information (BC/I) materials

2) ILL of (BC/I) materials

Example:

Request for information regarding a career in database development

3) reference question regarding BC/I

Example:

Can you find me a good example of a resume for a person that does not have much work experience?

4) directional question

Example:

Where are your books on

5) reader's advisory

b) **attending an event** (an episode, a *one time* happening)

- 1) programs, i.e., storytelling, special topics, one time instruction, etc.
- 2) use of meeting rooms, i.e., club and organization based *events*, tutoring, performances
- 3) library promotion or campaign, i.e., local history fair, kickoff of fund raising campaign
- 4) reception or gathering for a special purpose

c) **in stacks** (users perusing collection in the rows of shelved books and materials, including children's area of shelves)

- 1) browsing, perusing collections and materials
- 2) any activity such as comparing documents, investigating several titles, chatting with a friend about the materials, etc.

d) **interacting with others** (any shared activity in the library between two or more users)

- 1) reading to someone
- 2) someone being read to
- 3) tutoring someone
- 4) someone being tutored
- 5) one on one bibliographic instruction
- 6) studying in a group
- 7) doing homework in a group

e) **reading/writing**

- 1) person reading within any setting in the library
- 2) person writing within any setting in the library, including taking notes

f) **using computer**

- 1) searching databases
- 2) searching online catalog
- 3) word processing
- 4) mathematical calculations
- 5) retrieving email
- 6) self-instruction

g) **viewing display**

- 1) exhibits
- 2) bulletin boards
- 3) kiosks
- 4) collections

h) viewing/listening to A/V (specific to media activities)

- 1) videos
- 2) books on tape
- 3) taped music
- 4) microfiche (not storytime)

g) other (anything that you want to count that does not fit in the above)

- 1) photocopying
- 2) phone calls
- 3) sleeping
- 4) children playing
- 5) searching card catalog

Commons And Community Referral Sample Output Measures

These service responses were combined for this project because of the commonality of data that will be collected. Each of these responses conceptually relies on the library serving as a community agency that facilitates building community through allowing public discourse, provides space for community meetings, distributes community information, or simply offers public space for individual needs.

COMMONS environment helps address the need of people to meet and interact with others in their community and to participate in public discourse about community issues.

COMMUNITY REFERRAL addresses the need for information related to services provided by community agencies and organizations.

Possible service components include: community information databases; 24 hour I&R; dial-in access to community resource files; electronic access to community resources via malls, schools, etc. meeting room space (including auditorium); community events bulletin board or kiosk; email access; display spaces including (artwork, bulletin boards in hall or lobby); coffee shop; video conferencing facilities, photocopier areas or lockers.

RECORDED OUTPUT MEASURE EXAMPLES:

1. Total Library Visits - all people entering meeting room spaces, coffee shops, videoconferencing facilities, or community information/referral (CI/R) desk.

2. Community Information/Referral (CI/R) Reference Questions

Examples:

1. I need to find out what day the recycling truck comes to my neighborhood...
2. We are new in town, what daycare centers are closest to our address, and do you have the state ratings?
3. I need to get some information on types of free medical help available in the community for a personal problem do you have anything online that I can search?
4. We have a new client moving to town, what information do you have on local middle schools?
5. One of my employees is looking for a new apartment, he is a quadriplegic and therefore has certain architectural considerations, do you have a listing of ADA compliant apartments?

3. CI/R Materials Count

Examples:

All formats of materials that address any of the broad areas usually identified as CI/R subjects including but not exhaustive: health, consumer and educational resources; all local community information including events, public agencies and resources; clubs, organizations and services, information regarding local government and its services, legal aid etc.

4. CI/R In-Library Use Count

Examples:

Use of materials and services (all formats), in the library (circulating and non-circulating) that support CI/R as described above.)

For example, all **local** community information whether in print form, directory or database, and any online local community information.

- 5. CI/R Items Delivered Off-Site** - These would represent all CI/R materials as described above that are faxed, delivered by courier, in kiosks in malls, post offices, etc., or via bookmobile or other mechanism that provides access off-site.
- 6. On Site Library Programs Count** - All programs that address *community issues*, such as zoning regulations, political debates, neighborhood association meetings, support groups.
- 7. On Site Library Programs Attendance Count** - All people attending the above programs.
- 8. On Site Community Events Count** - These events would be best described, as events that *other* community agencies conduct at the library., e.g. the kickoff of the United Way campaign, AAA Safe Car Week at the Library, etc.
- 9. On Site Community Events Attendance Count** - All people attending the above events.
- 10. Off-Site Library Programs** - These programs may be as described in #6, providing community-based programming while partnering with another agency *off-site*. For example, in conjunction with the local community college, a one-day workshop for creating WWW. Homepages, or a 'new baby' class with the hospital, selecting first books for baby.
- 11. Off-Site Library Programs Attendance** - All people attending above events.
- 12. Brochures or Fliers Distributed about Community Agencies** - All brochures and fliers which communicate community information. A suggested way to count these is the count the number in each bin on the day(s) of the count, and count those left at the end of the count day.
- 13. Notices Posted on Community Bulletin Boards Count** - Actual singular number of notices posted on paper and electronic bulletin boards on the day(s) of the count.
- 14. Bibliographies, Pathfinders, User Guides on Local Topics Count** - These would include but are not exhaustive to: civic club directories; local emergency dental and medical care directories, locally published user guides to community services and events; or any other summary of community information.
- 15. CI/R Web Hits Count** -
Defined as the number of actions on the Web Site, such as when a user views a page or down loads a file regarding CI/R web hits.
- 16 . CI/R Web Page Views Counts** -
Defined as the number of page views or page impressions, that are hits to HTML pages only, regarding CI/R information.
- 17. CI/R Web Visitors/User Sessions Count** -
Defined as a session of activity (all hits) for one user of a CI/R web site. A unique user is determined by the IP address or cookie. By default, a user session ends when a user is inactive for more than 30 minutes. This duration can be changed from General panel in the Options, Web Log analysis dialog. Synonym: Visit

OBSERVED LIBRARY ACTIVITIES EXAMPLES:

a) **at the service desk** (the service desk can be described as circulation, reference, or information desk, self-service checkout)

- 1) checking out materials
- 2) ILL
- 3) getting a new library card
- 4) reference question
- 5) directional question
- 6) reader's advisory
- 7) paying a fine

b) **attending an event** (an episode, a *one time* happening)

- 1) programs, i.e., storytelling, special topics, one time instruction, etc.
- 2) use of meeting rooms, i.e., club and organization based *events*, tutoring, performances
- 3) library promotion or campaign, i.e., local history fair, kickoff of fund raising campaign
- 4) reception or gathering for a special purpose

c) **in stacks** (users perusing collection in the rows of shelved books and materials, including children's area of shelves)

- 1) browsing, perusing collections and materials
 - 2) any activity such as comparing documents, investigating several titles, chatting with a friend about the materials, etc.

d) **interacting with others** (any shared activity in the library between two or more users)

- 1) reading to someone
- 2) someone being read to
- 3) tutoring someone
- 4) someone being tutored
- 5) one on one bibliographic instruction
- 6) studying in a group
- 7) doing homework in a group

e) **reading/writing**

- 1) person reading within any setting in the library
- 2) person writing within any setting in the library, including taking notes

f) **using computer**

- 1) searching databases
- 2) word processing
- 3) mathematical calculations
- 4) retrieving email
- 5) self-instruction

g) **viewing display**

- 1) exhibits
- 2) bulletin boards
- 3) kiosks
- 4) collections

h) viewing/listening to A/V (specific to media activities)

- 1) videos
- 2) books on tape
- 3) taped music
- 4) microfiche (not storytime)

g) other (anything that you want to count that does not fit in the above)

- 1) photocopying
- 2) phone calls
- 3) sleeping
- 4) children playing

Current Topics And Titles, General Information, And Lifelong Learning Sample Output Measures

These three responses were combined due to the commonality of the data that would be collected under each service response. These service responses collectively provide a receptacle for all those services and materials that enhance a person's life through: knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

CURRENT TOPICS AND TITLES (CTT) helps to fulfill community residents' appetite for information about popular cultural and social trends and their desire for satisfying recreational experiences. "Current" is largely based upon staff knowledge of what is 'in' and what is 'out.' This is an experiential judgement call.

GENERAL INFORMATION (GI) helps meet the need for information and answers to questions on a broad array of topics related to work, school, and personal life.

LIFELONG LEARNING (LL) helps address the desire for self-directed personal growth and development opportunities.

Possible Service components: all formats of materials including non-fiction and fiction, paperback and hardbound, popular magazines, video and audio, CD-Roms , puppets, computer games of high-demand items; booktalks; author signings; readers' advisory; display shelvings; basic reference resource available through the library web page; 24 hour electronic reference service; dedicated telephone reference service; ready reference; BI programs; electronic and printed pathfinders; how-to programs on topics of general public interest; special topical displays; demos and exhibits; history and biography resources.

RECORDED LIBRARY OUTPUT MEASURE EXAMPLES:

1. Total Library Visits - All people entering the library.

2. Directional Question Counts -

Examples:

1. Which way is the children's area?
2. Are the magazines on the 1st or 2nd floor?
3. Which public computer is for after school homework?
4. Which room is the debate in?
5. Where are your bestsellers?

3. Reference Question Counts

Examples:

1. Which books would you suggest on web page development?
2. Do you have this year's National Book Award nominees and winners? We do not know who they are.
3. I want to learn more about winter gardening, which information sources do you have on hand?
4. We are planning a trip to Europe to learn more about the different styles of architecture, what print and online sources should we access?

4. Reference Questions Submitted or Answered via Internet Counts - Those questions received and responded to via email that are primarily requests that augment knowledge and appreciation of popular culture; access to a broad array of topics, and personal growth and development.

5. Total Circulation Counts - All formats of materials that address: knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

6. Total Fiction Circulation Counts - This will primarily represent new books, bestsellers, and other materials and sources representing popular culture. This is an experiential collective judgement determination by staff.

7. Hold Requests for Bestsellers/New Titles - The actual number of hold requests that are still 'on hold' on the day of the count. This is *not* simply the number of hold requests taken that particular day, but rather the collective count outstanding.

8. Total In-Library Use Counts -

Examples:

Use of materials or services in the library (circulating and non circulating) that

support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

Examples:

Popular magazines

Newspapers

Materials/services/databases on timely issues

Materials/services/databases on specific topics of general information

Materials/services/databases enhancing personal growth and development

9. In-Library Use Counts for Reference Materials - specifically those *reference* and *ready reference* materials that support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

10. In-Library Use Counts for Periodicals - specifically those periodicals that support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

11. In-Library Use Counts for Circulating Materials -specifically those ILL materials that support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

12. Interlibrary Loan (ILL) from Other Libraries Counts (same as 11.)

13. ILL Sent out to other Libraries

14. Library items delivered offsite (courier, fax email, bookmobile) - specifically those materials that support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

15. Nonfiction Delivered Offsite Counts

16. On-site Library Program (number of programs) counts - specifically those programs that support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

Examples:

Booktalks

Author signings

IRS changes in income tax revisions

Winter gardening programs

Rock N' Roll Review of last decade in audio section

17. On-site Library Program (total number in attendance) counts - All people attending the above events.

18. Off-site Library Program (number of programs) counts

These programs may be as described in #16, providing these programs may be as described in #6, providing knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

Examples:

Author dinner as fundraiser for the Library

Programs at daycare centers and senior centers

Joint programs with other entities such as radio stations and television stations

19. Off-Site Library Program (total number in attendance) counts

20. Web Hits Count -

Defined as the number of actions on the Web Site, such as when a user views a page or down loads a file regarding web hits that support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

21 . CI/R Web Page Views Counts -

Defined as the number of page views or page impressions, that are hits to HTML pages only, regarding information that supports that described in #20.

22. CI/R Web Visitors/User Sessions Count -

Defined as a session of activity (all hits) for one user of a web site that supports knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development. A unique user is determined by the IP address or cookie. By default, a user session is terminated when a user is inactive for more than 30 minutes. This duration can be changed from General panel in the Options, Web Log analysis dialog. Synonym: Visit

23. Number of Times CD Roms Used that support knowledge and appreciation of popular culture; access to a broad array of topics, and augmenting personal growth and development.

OBSERVED LIBRARY ACTIVITIES EXAMPLES:

a) **at the service desk** (the service desk can be described as circulation, reference, or information desk, self-service checkout)

- 1) checking out materials
 - 2) ILL
 - 3) getting a new library card
 - 4) reference question
 - 5) directional question
 - 6) reader's advisory
 - 7) paying a fine
- b) **attending an event** (an episode, a *one time* happening)
- 1) programs, i.e., storytelling, special topics, one time instruction, etc.
 - 2) use of meeting rooms, i.e., club and organization based *events*, tutoring, performances
 - 3) library promotion or campaign, i.e., local history fair, kickoff of fund raising campaign
 - 4) reception or gathering for a special purpose
- c) **in stacks** (users perusing collection in the rows of shelved books and materials, including children's area of shelves)
- 1) browsing, perusing collections and materials
 - 2) any activity such as comparing documents, investigating several titles, chatting with a friend about the materials, etc.
- d) **interacting with others** (any shared activity in the library between two or more users)
- 1) reading to someone
 - 2) someone being read to
 - 3) tutoring someone
 - 4) someone being tutored
 - 5) one on one bibliographic instruction
 - 6) studying in a group
 - 7) doing homework in a group
- e) **reading/writing**
- 1) person reading within any setting in the library
 - 2) person writing within any setting in the library, including taking notes
- f) **using computer**
- 1) searching databases
 - 2) word processing
 - 3) mathematical calculations
 - 4) retrieving email
 - 5) self-instruction
- g) **viewing display**
- 1) exhibits
 - 2) bulletin boards
 - 3) kiosks
 - 4) collections
- h) **viewing/listening to A/V** (specific to media activities)
- 1) videos
 - 2) books on tape
 - 3) taped music
 - 4) microfiche (not story time)

- g) **other** (anything that you want to count that does not fit in the above)
 - 1) photocopying
 - 2) phone calls
 - 3) sleeping
 - 4) children playing

Local History And Genealogy Sample Output Measures

service addresses the desire of community residents to know and better understand personal or community heritage.

Possible service components: instruction in genealogical research methods; programs on local history; archives; indexed newspapers; www links. Because this is a well-known discreet area/collection of materials and services, the definitions will be fewer.

Recorded Library Output Measures Examples:

1. Visits to Local History /Genealogy Area - All people entering the area which house the primary sources for local history and genealogy.

2. LHG Reference Questions

3. In-Library Use

4. Interlibrary Loans

5. Bibliographies Distributed

6. On-site Library Programs

7. Other Library Programs

8. Off-Site Library Programs

9. LHG Web Hit Statistics

10. LHG Page View Statistics

11. Other Library Programs

12. Off-site Library Programs

13. Web Hits Count -

Defined as the number of actions on the Web Site, such as when a user views a page or down loads a file regarding web hits that supports instruction in genealogical research methods; programs on local history; archives; indexed newspapers; www links

14 . CI/R Web Page Views Counts -

Defined as the number of page views or page impressions, that are hits to HTML pages only, regarding information that supports LHG.

15. CI/R Web Visitors/User Sessions Count -

Defined as a session of activity (all hits) for one user of a web site that supports LHG. A unique user is determined by the IP address or cookie. By default, a user session is terminated when a user is inactive for more than 30 minutes. This duration can be changed from General panel in the Options, Web Log analysis dialog. Synonym: Visit

16. Number of Times CD Roms Used that support LHG.

OBSERVED LIBRARY MEASURES EXAMPLES:

a) **at the service desk** (the service desk can be described as circulation, reference, or information desk, self-service checkout)

- 1) checking out materials
- 2) ILL
- 3) getting a new library card
- 4) reference question
- 5) directional question
- 6) reader's advisory
- 7) paying a fine

b) **attending an event** (an episode, a *one time* happening)

- 1) programs, i.e., storytelling, special topics, one time instruction, etc.
- 2) use of meeting rooms, i.e., club and organization based *events*, tutoring, performances

Counting On Results Instruction Manual

- 3) library promotion or campaign, i.e., local history fair, kickoff of fund raising campaign
- 4) reception or gathering for a special purpose
- c) **in stacks** (users perusing collection in the rows of shelved books and materials, including children's area of shelves)
 - 1) browsing, perusing collections and materials
 - 2) any activity such as comparing documents, investigating several titles, chatting with a friend about the materials, etc.
- d) **interacting with others** (any shared activity in the library between two or more users)
 - 1) reading to someone
 - 2) someone being read to
 - 3) tutoring someone
 - 4) someone being tutored
 - 5) one on one bibliographic instruction
 - 6) studying in a group
 - 7) doing homework in a group
- e) **reading/writing**
 - 1) person reading within any setting in the library
 - 2) person writing within any setting in the library, including taking notes
- f) **using computer**
 - 1) searching databases
 - 2) word processing
 - 3) mathematical calculations
 - 4) retrieving email
 - 5) self-instruction
- g) **viewing display**
 - 1) exhibits
 - 2) bulletin boards
 - 3) kiosks
 - 4) collections
- h) **viewing/listening to A/V** (specific to media activities)
 - 1) videos
 - 2) books on tape
 - 3) taped music
 - 4) microfiche (not storytime)
- g) **other** (anything that you want to count that does not fit in the above)
 - 1) photocopying
 - 2) phone calls
 - 3) sleeping
 - 4) children playing

Information Literacy Sample Output Measures

service helps address the need for skills related to finding, evaluating and using information effectively. Possible service components: classroom space; media literacy; computer laboratory; BI; instructional technology.

RECORDED LIBRARY OUTPUT MEASURE EXAMPLES:

- 1. Total Library Visits** - All people who enter the library
- 2. Reference Questions**

Example:

"We are buying a home next year, can you show us how to search the Internet for home buying information?"

" I am confused about certain aspects of setting up the hardware and software on my home PC, do you have a book that explains this process?"

3. Circulation of Computer or Information Literacy Related Materials address the need for skills related to finding, evaluating and using information effectively.

4. In-Library Use Counts of Indexes, Abstracts, Directories address the need for skills related to finding, evaluating and using information effectively.

5. Off-site deliveries of computer or literacy items counts (by courier, fax, email) address the need for skills related to finding, evaluating and using information effectively.

6. Bibliographies/Pathfinders Produced or Distributed Count.

7. Information Literacy/or Bibliographic Instruction Programs Count address the need for skills related to finding, evaluating and using information effectively.

8. Information Literacy/or Bibliographic Instruction Programs Attendance Count

9. Computer Literacy Programs Count

10. Computer Literacy Programs Attendance Count

11. Database Searching Programs Count

12. Database Searching Programs Attendance Count

13. Web Development Programs Count

14. Web Development Programs Attendance Count

15. Library Tours Count

16. Library Tours Attendance Count

17. Off-site Information Literacy Programs Count

18. Off-site Information Literacy Programs Attendance Count

19. Library Website Hits to How-To Pages Count

20. Library Website Page View Defined as the number of page views or page impressions, that are hits to HTML pages only, regarding information that supports LHG.

21. Web Visitors/User Sessions Count -

Defined as a session of activity (all hits) for one user of a web site that supports LHG. A unique user is determined by the IP address or cookie. By default, a user session ends when a user is inactive for more than 30 minutes. This duration can be changed from General panel in the Options, Web Log analysis dialog. Synonym: Visit

22. CD-Rom Use Count

OBSERVED LIBRARY ACTIVITIES EXAMPLES:

a) **at the service desk** (the service desk can be described as circulation, reference, or information desk, self-service checkout)

1) checking out materials

2) ILL

- 3) getting a new library card
 - 4) reference question
 - 5) directional question
 - 6) reader's advisory
 - 7) paying a fine
- b) **attending an event** (an episode, a *one time* happening)
- 1) programs, i.e., storytelling, special topics, one time instruction, etc.
 - 2) use of meeting rooms, i.e., club and organization based *events*, tutoring, performances
 - 3) library promotion or campaign, i.e., local history fair, kickoff of fund raising campaign
 - 4) reception or gathering for a special purpose
- c) **in stacks** (users perusing collection in the rows of shelved books and materials, including children's area of shelves)
- 1) browsing, perusing collections and materials
 - 2) any activity such as comparing documents, investigating several titles, chatting with a friend about the materials, etc.
- d) **interacting with others** (any shared activity in the library between two or more users)
- 1) reading to someone
 - 2) someone being read to
 - 3) tutoring someone
 - 4) someone being tutored
 - 5) one on one bibliographic instruction
 - 6) studying in a group
 - 7) doing homework in a group
- e) **reading/writing**
- 1) person reading within any setting in the library
 - 2) person writing within any setting in the library, including taking notes
- f) **using computer**
- 1) searching databases
 - 2) word processing
 - 3) mathematical calculations
 - 4) retrieving email
 - 5) self-instruction
- g) **viewing display**
- 1) exhibits
 - 2) bulletin boards
 - 3) kiosks
 - 4) collections
- h) **viewing/listening to A/V** (specific to media activities)
- 1) videos
 - 2) books on tape
 - 3) taped music
 - 4) microfiche (not storytime)

- g) **other** (anything that you want to count that does not fit in the above)
 - 1) photocopying
 - 2) phone calls
 - 3) sleeping
 - 4) children playing

APPENDIX C
Data Collection Forms

Instruction for Using the Data Collection Forms

The data collection forms are meant to make your participation in this project easier. If you are already collecting the information requested by us for other reasons and you would find it easier to just ignore the forms we have developed, please do so. Otherwise please make as many copies of the following forms as necessary for your participation in this project.

There are two forms for the recorded output measures for each of the six service responses. The first of the two forms contains a sequential list of output measures that duplicates the order in which those output measures are requested by the Palm PDA. Your use of the form will provide you with a paper copy of the recorded output data for your time period in one convenient location.

For many of the recorded output measures you will probably have those data recorded elsewhere (e.g., circulation totals by your automated library system) or it would be simplest if you just have the appropriate personnel within your library make a check on a notepad in which you kept track of some of the output measures (e.g., one check mark per qualifying reference question).

The recorded output measures that we thought you would find a pre-formatted data form useful was in the area of programs and events. There is one program data collection form for each service response.

Each program form provides columns for you to note the date and time and name of the program or event. The remaining columns allow you to mark the type of event (e.g., whether it is on-site, off-site, an adult-type program) as well as to note the number of individuals attending that particular event. There should be just one program type and one attendance number per row. At the bottom of the form, there is a row for you to total the number of programs of a particular type (e.g., on-site children's programs for the Basic Literacy service response) as well as to sum the total attendance at that type of program. These totals can then be transferred to the first form of the service response for entry into the Palm PDA.

There is just one observed activities form and it can be used by all libraries for each of their service responses. On this form, you can record the date and time of your observations. Each line corresponds to one record on the Palm PDA. You may want to utilize this form to supplement your PDA if you have a larger library with several individuals collecting observed activities at the same time.

On each line of the form, you pick ONE location where you observed the activity, ONE activity, and then enter the number of users of each age category that participated in that activity at that library location. Afterwards, you can then enter these data into the PDA line by line.

Basic Literacy: Recorded Output Measures

Period of Time Covered: _____ DATE: _____

	NUMBER
Reference Questions	_____
Circulation, Children's Pre-reading Materials	_____
Circulation, Adult Basic Literacy/ESL Materials	_____
In-Library Use, Children's Pre-reading Materials	_____
In-Library Use, Adult Basic Literacy/ESL Materials	_____
Document Delivery, Children's Pre-reading Materials	_____
Document Delivery, Adult Basic Literacy/ESL Materials	_____
Tutoring, Children	_____
Tutoring, Adult	_____
No. of Tutors Trained	_____
In-Library Children's Programs	_____
In-Library Children's Programs, Attendance	_____
Off-site Children's Programs	_____
Off-site Children's Programs, Attendance	_____
Adult Basic Literacy/ESL Programs	_____
Adult Basic Literacy/ESL Programs, Attendance	_____
New Library Cards Issued	_____
Basic Literacy Web Page Hits	_____
Basic Literacy Web Page Views	_____
Basic Literacy Visitor/User Sessions Count	_____
Number of Times Basic Literacy/ESL CD-ROMs Used	_____

Current Topics and Titles, General Information, and Lifelong Learning: Recorded Output Measures

Period of Time Covered: _____ DATE: _____

	NUMBER
Total Library Visits	_____
Directional Question Counts	_____
Reference Question Counts	_____
Reference Questions via Internet Counts	_____
Total Circulation Counts	_____
Total Fiction Circulation Counts	_____
Hold Requests for Bestsellers/New Titles	_____
In-Library Use Counts, Reference Materials	_____
In-Library Use Counts, Periodicals	_____
In-Library Use Counts, Circulating Materials	_____
Interlibrary Loan (ILL), Items Received Count	_____
ILL, Items Sent Out to Other Libraries Count	_____
Library Items Delivered Offsite (Courier, Fax, Bookmobile)	_____
Nonfiction Delivered Offsite Counts	_____
On-Site Library Program Count	_____
On-site Library Program, Attendance Count	_____
Off-site Library Program Count	_____
Off-site Library Program, Attendance Count	_____
Web Hit Count	_____

**Current Topics and Titles, General Information, and Lifelong Learning: Recorded Output Measures
(continued)**

Period of Time Covered: _____ DATE: _____

NUMBER

Web Page Views Count _____

Visitor / User Sessions Count _____

Number of Times CD-ROMs Used _____

Business and Career Information: Recorded Output Measures

Period of Time Covered: _____ DATE: _____

	NUMBER
Visits to Business/ Career (B/C) Area	_____
B/C Reference Questions	_____
B/C Volume Circulation	_____
B/C In-Library Use Count	_____
B/C Interlibrary Loan (ILL), Materials Sent Count	_____
B/C ILL, Materials Received Count	_____
B/C Materials Delivered Offsite Count (e.g., faxes)	_____
On-site Library-Sponsored B/C Programs	_____
On-site Library-Sponsored B/C Programs, Attendance	_____
Off-site B/C Programs	_____
Off-site B/C Programs, Attendance	_____
B/C Web Hit Statistics	_____
B/C Page View Statistics	_____
B/C Visitors/User Sessions Count	_____
Number of Times B/C CD-ROMs Used	_____

Local History and Genealogy: Recorded Output Measures

Period of Time Covered: _____ DATE: _____

	NUMBER
Visits to Local History/ Genealogy Area	_____
LHG Reference Questions	_____
In-Library Use	_____
Interlibrary Loans, Items Received	_____
Interlibrary Loans, Items Lent Out	_____
Bibliographies Distributed	_____
On-site Library-Sponsored LHG Programs	_____
On-site Library-Sponsored LHG Programs, Attendance	_____
Other Non-Library Sponsored LHG Programs	_____
Other Non-Library Sponsored LHG Programs, Attendance	_____
Off-site Library Programs	_____
Off-site Library Programs, Attendance	_____
LHG Web Hit Statistics	_____
LHG Page View Statistics	_____
LHG Visitor/User Sessions Count	_____
Number of Times CD-ROMs Used	_____

Appendix D
Palm PDA Codes for Locations and Activities

Location Codes

<u>Library Location</u>	<u>Palm PDA Code</u>
Audio/Video Area	AV
Basic Literacy Area	BL
Business/Career Area	BC
Children's Area	CH
Commons Area	CO
Community Information Area	CI
Current Topic/New Mat. Area	CT
General Library	LB
Homework Center	HO
Local History/Genealogy Area	LH
Periodical Room	PD
Reading Room	RE
Reference Area	RF
Stacks	ST

Activity Codes

<u>Activity</u>	<u>Palm PDA Code</u>
At Service Desk	SD
Attending Event	EV
In Stacks	BR
Interacting with Others	IO
Other	OT
Reading/Writing	RW
Using Computer	CU
Viewing Display	DI
View/Listening to A/V	AV