



STATE LIBRARY OF OREGON

LIBRARY SERVICES AND TECHNOLOGY ACT

2018-2022 FIVE-YEAR PLAN EVALUATION REPORT

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EVALUATION SUMMARY

The State Library of Oregon is viewed by the Oregon library community as an essential resource and support for ensuring access to library services across the state. The State Library is highlighted for its strength in cultivating and maintaining relationships across the state, the expertise of its staff, and the impact of several programs.

The State Library should strive to keep a statewide perspective, capitalizing on its big-picture view to ensure equitable service while ensuring funding prioritizes the opportunities uncovered by this statewide perspective to support libraries with the most need or that are the most under-resourced. Members of the Oregon library community expect the State Library to act as a connector, bringing together good ideas across libraries. They also support the State Library providing targeted investment, as an equalizing measure that helps to level the playing field among libraries across Oregon.

Libraries see activity with a statewide perspective as both beneficial and successful, as it provides resources to those who would otherwise not have access, freeing up other libraries to refocus their resources. The impact of these services — the Statewide Database Licensing Program (SDLP), services for school library staff, consulting services, and continuing education in particular — is difficult to measure; current data points do not fully capture the positive impact and benefits of the work done by State Library staff that contributes to their success. What is viewed as the most successful investment of LSTA funding by the library community tends to focus on broader impact; while that broader impact and satisfaction are part of the State Library's customer satisfaction survey, it does not necessarily touch on individual project evaluation.

Members of the Oregon library community recognize that some libraries and library types need additional focus and support — most notably, school libraries and libraries serving small, rural communities — and want to see the State Library invest more heavily in these areas.

The language in the previous Five-Year Plan did not articulate fully how activities supported by LSTA funds address equity efforts. In addition, IMLS data collection requirements do not provide a structure for capturing equity outcomes. There are multiple opportunities for the State Library to improve upon the distribution of LSTA funds, whether internally, by diverting resources to areas of the greatest need, or externally, through a revision to the competitive grant process and the development of areas of granting support and focus. Members of the Oregon library community understand and appreciate the importance of LSTA funding while seeking ways to ensure the critical funds flow throughout the state and across library types.

This evaluation was approached with a future-focused, asset-based perspective. It asked members of the Oregon library community to share the strengths and opportunities in their own institutions as well as for the State Library, including ways in which the State Library could have the most impact across the library community, and the multiple paths toward equity in service.

Programs that received the most funding, such as the Statewide Database Licensing Program and OSLIS, were consistently highly rated for impact and importance, even if the usage data does not align. Programs that had significant and broad impact - consulting services and continuing education - were likewise consistently highly rated.

Opportunities for improved impact should focus on:

- developing guidelines for investment that prioritize equity for systemically and historically marginalized groups;
- focusing spending where it is most needed, such as school libraries and in small libraries and community colleges that support rural Oregon;
- supporting systematic outcomes across library types; and
- developing a focus for digital equity that is suited for Oregon.

The State Library of Oregon made major progress on all of its Goals and Activities. The evaluators determined that many projects were achieved because of their significant statewide impact, across populations and the broader library community. Some projects were discrete and determined to be achieved because of full completion, while other projects are achieved because they are part of multi-year or evergreen efforts that continually meet their goals. Just a few projects were identified as partially achieved, with the State Library of Oregon looking ahead to the balance of this LSTA cycle to achieve completion.

EVALUATION REPORT

A. Retrospective Questions

A-1. To what extent did your Five-Year Plan activities make progress towards each goal? Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?

The evaluators determined projects to be **achieved** when they demonstrated significant statewide impact, crossed multiple service populations, or served as a successful platform or pilot for other projects, whether within the State Library or in the broader library community. Projects were also viewed as **achieved*** if they are successful on-going efforts that do not need fundamental changes because they are meeting their goals. The asterix simply denotes the evergreen nature of these endeavors.

Projects were marked **partially achieved** that saw large swings in funding not explained in the Grants to States Program Report, or where the library community shared specific, achievable suggestions for improvement, scale, reach, or impact. Items marked partially achieved have additional information shared in part A-2.

While data collected for the Grants to States program informed some aspects of the evaluation towards progress, the outcomes-based evaluative language of the 2018-2022 Five-Year Plan did not, in most cases, translate into consistently collected and analyzed data. Determination of the success of a program relied heavily on the self-reporting and engagement of members of the library community in the town halls, focus groups, and interviews held for the process.

<i>Goals and Outcomes</i>	<i>Achieved Partially achieved Not achieved</i>
Provide Access to Library Services, Materials, and Information Resources	
Statewide Database Licensing Program (SDLP)	Achieved
Sage Courier Subsidy	Achieved
Libros for Oregon	Partially achieved
Oregon Digital Library Consortium (ODLC)	Achieved*

Newspaper digitization grants	Achieved*
Federal documents cataloging	Achieved
Use technology to increase capacity to provide access to library services, materials, and information resources	
Email Lists	Achieved*
Answerland	Achieved*
Northwest Digital Heritage	Achieved*
Promote Evidence-Based Practice in Libraries	
Minimum Conditions for Public Libraries	Partially achieved
Consulting Services	Achieved*
Public Library Statistics	Achieved*
Oregon Intellectual Freedom Clearinghouse	Achieved*
Edge Initiative	Achieved
Covid-19 LibGuide	Achieved
Develop Information Literacy Skills	
School Library Services	Achieved*
Oregon School Library Information System (OSLIS)	Achieved

Foster Lifelong Learning	
Continuing Education	Achieved*
Oregon Battle of the Books	Achieved*
Summer Reading Program	Achieved*
Workforce Development	Partially achieved
LIS Collection	Achieved*
Youth Services	Achieved*

Each of the five goals overall are marked as achieved, however, achievement does not mean the activities related to the goal have an end date. This is because some goals are evergreen in nature, such as the development of information literacy, staff-focused activities to foster lifelong learning, and consulting.

<i>Goals</i>	<i>Achieved</i> <i>Partially achieved</i> <i>Not achieved</i>
#1 Provide Access to Library Services, Materials, and Information Resources	Achieved*
#2 Use technology to increase capacity to provide access to library services, materials, and information resources	Achieved*
#3 Promote Evidence-Based Practice in Libraries	Achieved*
#4 Develop Information Literacy Skills	Achieved*
#5 Foster Lifelong Learning	Achieved*

A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?

The State Library of Oregon Five-Year Plan (2018-2022) has five broad Goals. In each section below there is a crosswalk chart in which:

- the Goal is related to a IMLS Measuring for Success Focal Areas;
- the Goal and Focal Areas are linked to IMLS Intents; and
- the Goals, Focal Area, and Intents and linked to statewide projects.

Following each crosswalk chart are subsections that summarize how each Associated Statewide Project achieved results. Included in each subsection is the expenditure amount for the project. For multi-year projects, the expenditure amount has been totaled for each year.

Goal #1: Provide access to library services, materials, and information resources

<i>State Goal</i>	<i>IMLS Focal Area</i>	<i>IMLS Intent</i>	<i>Associated Statewide Project(s)</i>
Provide access to library services, materials, and information resources	Information Access	Improve users' ability to discover information resources	Statewide Database Licensing Program
		Improve users' ability to obtain and/or use information resources	Sage Courier Subsidy, Libros for Oregon, Oregon Digital Library Consortium, Newspaper digitization grants, Federal documents cataloging
	Institutional Capacity	Improve the library workforce	Continuing Education (Library and Information Science Collection, Lyrisis statewide membership)

Goal #1, Activity 1. Statewide Database Licensing Program (SDLP): Achieved

Expenditures \$770,514.17 (2018)
\$700,394.89 (2019)
\$762,622.60 (2020)

The Statewide Database Licensing Program (SDLP) subsidizes statewide subscriptions to a suite of Gale databases and to LearningExpress Library, to enable all Oregonians to access quality research material and learning resources regardless of location.

The State Library subsidizes 100% of the statewide database subscription costs for all legally established public and tribal libraries and all not-for-profit academic and K-12 libraries. An additional subsidy is provided to academic libraries to support more specialized database subscriptions for those audiences. Participating libraries provide access to SDLP databases via their websites, and K-12 students and educators gain access via OSLIS, an information literacy website, oslis.org. Citizens without library service may access SDLP databases from librariesoforegon.org.

The State Library's investment in statewide access to these resources is an existing model of a program that provides for equalization of library services across the State. The SDLP effectively supports some of the least resourced libraries in the State, many of which serve people below the poverty line. The SDLP is a systemic solution to ensuring access to information for every Oregonian. This program sends the message to citizens and library stakeholders of all types that the State Library endeavors to provide equal access to information.

It is important to note the data usage shared below does not entirely reflect the impact of this program. The SDLP and OSLIS are viewed across library type, size, and geography as an essential resource provided by the State Library, and its perceived impact far outpaces its usage. The provision of these foundational resources allows smaller libraries of all types to offer access to electronic resources; ensures a continuity of experience for students, including as they may transition from high school into community college in particular; and allows larger or better funded libraries to invest their organizational funding for electronic resources elsewhere, which is particularly critical for academic libraries. While this project is marked as achieved, as this program continues, the State Library should explore how to collect data around impact (for example, how many libraries are able to use the funding they would have otherwise spent on this type of resource, and what impact do those additional resources have on their local service population). This is also an example of a project where the IMLS should explore how to ask for reports of different data, providing a glimpse of impact across the country.

Gale Databases

	2018 Retrievals	2019 Retrievals	2020 Retrievals
Library Type			
Academic	803,883	664,383	695,084
Public/Tribal	80,451	63,288	133,360
OSLIS/K-12	1,295,823	1,874,586	825,141
TOTAL	2,180,157	2,602,257	1,653,585

Learning Express Library

	2018 Sessions	2019 Sessions	2020 Sessions
Library Type			
Academic	11,471	15,432	10,322
Public/Tribal	6,461	9,170	8,608
OSLIS/K-12	12,650	14,050	10,084
TOTAL	30,582	38,652	30,660

Goal #1, Activity 2. Sage Courier Subsidy: *Achieved*

Expenditures \$58,300.00 (2018)
 \$58,300.00 (2019)
 \$61,101.00 (2020)

The Sage Library System, with funds from LSTA and from member libraries, provides courier service to all member libraries, which include public, school, special, and community college libraries. Seventy-five Sage libraries are spread out over a 15-county expanse of Oregon larger than 30 US states. Many of the libraries are in very rural areas and have correspondingly small budgets. This project provided access to library services, materials, and information resources; aligned with the federal LSTA priority to increase information access; and improved library users' ability to obtain and use information resources. The subsidy itself provides support to some of the least resourced libraries in the State, many of which serve people below the poverty line.

The State Library could advance this program by expanding it beyond the current service area. Additional courier subsidies to targeted areas in the State of Oregon would provide greater equity of access to resource-sharing among libraries, regardless of where they are located. In the focus group sessions, there was admiration of the courier service and the way it forged a link across types of libraries.

Goal #1, Activity 3. Libros for Oregon: Partially achieved

Expenditure \$3,410.00 (2020)

Libros for Oregon (LfO), a committee of the Oregon Library Association's REFORMA Oregon division, supports Spanish-language collection development in Oregon libraries. LSTA funds were used to hire and to create a new brand and digital presence for LfO, along with promotional materials.

The LSTA evaluation survey and comments in the focus groups indicate there to be a strong need for the creation of robust Spanish-language collections. A future funding of this activity could be to provide for the development and purchase of Spanish-language core collections as well as more active local support for expanding and maintaining a user-focused collection.

Goal #1, Activity 4. Oregon Digital Library Consortium (ODLC): Achieved as part of an ongoing, successful project

Expenditures \$50,000.00 (2018)

\$74,500.00 (2019)

\$85,000.00 (2020)

Library2Go is a collection of audio and e-books managed by the Oregon Digital Library Consortium (ODLC). LSTA funds only support part of this project. The majority of funding for the ODLC comes from member library fees. ODLC's statistics reflect its total collection, which provides access to over 45,000 unique titles of e-books and digital audiobooks. This project provides access to library services, materials, and information resources; aligned with the federal LSTA priority to increase information access; and improved library users' ability to obtain and use information resources.

Over the course of three years, in all formats the number of checkouts are as follows:

- 2018 1,585,289
- 2019 1,894,905
- 2020 2,267,218

This activity was viewed as achieved because of the great impact the investment has not only on the viability of the ODLC but in its ability to positively impact access for patrons across the state. State funding is crucial to preserving the viability of this program as well as for supporting a diverse collection; for example, FY20 LSTA funds helped support an expansion of Spanish language materials in the collection. The challenge to funding ODLC is finding ways to fund content in this format across the state as well as to ensure the collection can move beyond its focus on meeting holds demand with greater consistency while prioritizing serving readers with the greatest need.

Goal #1, Activity 5. Newspaper digitization grants: Achieved as an ongoing, successful project

The State Library has provided six newspaper digitization grants so far in this Plan cycle.

- *Coquille Valley Sentinel*, Expenditure \$4,358.90 (2019)
- *Gate City Journal*, Expenditure \$9,759.10 (2019)
- *Harney County Library*, Expenditure \$3,112.20 (2020)
- *Yamhill County Historical Society*, Expenditure \$4,465.50 (2020)
- *Tillamook County Library*, Expenditure \$7,147.40 (2020)
- *North Santiam Historical Society*, Expenditure \$8,236.80 (2020)

Progress on newspaper digitization across the state is achieved because it is a multi-year activity. The State Library has made funding decisions using an equity-based approach, with efforts made to fund rural paper and also papers in communities threatened by wildfires. A continued systematic, multi-year approach based in equity will incrementally increase the representation of all Oregonians in the Oregon Digital Newspaper Project at the University of Oregon Libraries.

Goal #1, Activity 6. Federal documents cataloging: Achieved

Expenditures 2019 \$31,724.76
2020 \$58,407.75

The State Library of Oregon worked with the Portland State University Library to provide access to un-cataloged portions of the Regional Federal Depository Collection. 24,469 items were cataloged, and approximately 30% were unique in the Orbis Cascade Alliance catalog, which includes academic libraries in Idaho, Oregon, and Washington. Increased access to these materials through the libraries' catalog systems has been even more essential since building closures during the pandemic have limited the ability of users to discover materials through browsing print collections.

Goal #1, Activity 7. Competitive Grants

The State Library provided grant-support for a cross-section of activities that support Goal #1.

Competitive grants provide an opportunity for the incubation of ideas and strategies. In addition to local positive outcomes, the State library can use the grant projects as opportunities to harvest learning and develop models that can be used, applied, or adapted by libraries across Oregon. Additional suggestions for the competitive grants program, particularly in ensuring equitable use of the funds, have been shared in the future report appended to this evaluation report.

Children's Literature & Equity Resource Center - Central Oregon Community College.
Expenditure \$32,064.00 (2018)

The Children's Literature and Equity Resource Center at Central Oregon Community College's Barber Library provides a dedicated space and collection of materials that reflect the diversity of the human experience. This project provided access to library services, materials, and information resources; aligned with the federal LSTA priority to increase information access; and improved library users' ability to obtain and use information resources.

For Every Student, A Library, Year 3 — Springfield Public Schools, Expenditure \$8,000.00 (2018)

This project extends public library service to every student enrolled in Springfield Public Schools and their families regardless of whether they live within the current service boundary of Springfield Public Library.

Josephy Center Library Strategic & Succession Planning — Josephy Center for Arts and Culture, Expenditure \$9,986.75 (2018)

The Josephy Center for Arts and Culture used funds to create a collections assessment, a new strategic plan, and a succession plan document. This project aligned with the federal LSTA priority to build institutional capacity; and improved library operations.

Prioritizing and Evaluating Equitable Library Outreach — Multnomah County Library, Expenditure \$119,224.13 (2018)

The goal of this project was to develop a plan to make Multnomah County Library's outreach more equitable, by better prioritizing outreach opportunities, evaluating activities, and tackling the internal challenges that staff face in implementing this work. This project provided access to library services, materials, and information resources; aligned with the federal LSTA priority for civic engagement; and improved library users' ability to participate in their community.

COVID-19 Collection Development mini-grants, Expenditure \$140,425.11 (2019)

As the COVID-19 pandemic came to Oregon in early March 2020, the State Library realized that some previously planned activities for spring and summer would need to be canceled. LSTA funds were reallocated to help libraries pivot to a variety of new alternative service models. The State Library redirected some LSTA funding to offer mini-grants up to \$3,000. These Collection Development mini-grants (49 subgrants made to 23 community college and academic libraries, public libraries, and school districts), went to support the first LSTA goal of providing access to library services, materials and information resources. Libraries used these funds to add e-book content and online resources to their collections for virtual access.

The Mark O. Hatfield Congressional Legislative Series: A Window into 20th Century American Politics — Willamette University,

Expenditure \$88,656.75 (2020)

Willamette University Archives and Special Collections used funds to process and begin digitization of the Mark O. Hatfield Congressional Legislative Series—a regionally and nationally significant collection of materials from U.S. Senator and Oregon Governor Mark O. Hatfield (R-OR, 1967-1997).

Goal #2: Use technology to increase capacity to provide access to library services, materials and information resources

State Goal	IMLS Focal Area	IMLS Intent	Associated Statewide Project(s)
Provide access to library services, materials, and information resources	Information Access	Improve users' ability to discover information resources	Answerland
		Improve users' ability to obtain and/or use information resources	Northwest Digital Heritage
	Institutional Capacity	Improve the library workforce	Email lists

Goal #2, Activity 1. Email lists: Achieved, as an ongoing successful project

The State Library hosts and manages multiple lists for the Oregon library community. Anyone eligible may choose to subscribe to a variety of open discussion lists. Libs-Or - a list for sharing information about the Oregon library community - is viewed as an especially crucial communication tool by those aware of it. A recent expansion of the scope of OSLLIST - a list used to send information to school library personnel about the Oregon School Library Information System (OSLLIS) and the K-12 statewide databases - to include more information to school library staff has likewise made it a more critical tool.

Goal #2, Activity 2. Answerland: Achieved, as an ongoing successful project

Expenditures \$126,230.05 (2018)
 \$110,851.78 (2019)
 \$112,850.61 (2020)

[Answerland](#) is a 24/7 statewide information service that provides Oregonians with the opportunity to connect to a librarian online (via chat or email). The service also saves costs by providing a collaborative statewide service and encourages knowledge and resource sharing among Oregon's libraries. Additionally, the project provides the opportunity for Oregon library staff to learn digital reference skills.

The number of questions answered each through the service is as follows. *Note: During 2019-2020 Multnomah County Library used the Answerland services to handle curbside pick-up of materials*

during the Covid-19 pandemic. This accounts for 22,791 "questions answered" in that year.

2017-2018	14,568
2018-2019	9,291
2019-2020	39,865 (17,074 without Multnomah holds)

Cooperativa en Español, now in its second year, expands access of Answerland to Spanish speakers. While this program is still in evaluation mode, it is clear the volunteer-based model of Answerland presents challenges to more equitably expanding resources, as there are fewer Spanish-speaking staff in Oregon libraries than are needed, and some volunteers in Cooperativa en Español question the low use and "taking the time" away from helping people in person in Spanish.

Goal #2, Activity 2. Northwest Digital Heritage: Achieved as an ongoing, successful project

Expenditure \$60,499.25 (2020)

[Northwest Digital Heritage](#), a newly-started cross-state partnership with the Washington State Library, Oregon Heritage Commission, and the State Library of Oregon, helps Oregon-based libraries, museums, and cultural heritage organizations build and share their local digital collections. Northwest Digital Heritage also operates as a service hub of the [Digital Public Library of America](#) (DPLA), which helps bring these unique and local Northwest collections to a wider audience. In engagement sessions, special library staff expressed the view that archival efforts in the Pacific Northwest are traditionally underfunded, which makes this use of LSTA funds especially valuable to them. They see the State Library as an important partner in raising the profile of digitization efforts, and this is seen as indirectly strengthening efforts to pursue other grant-based funding for digitization. The kind of partnership that underpins the Northwest Digital Heritage project is an example of the kind of cross-state, cross-sector work that should be prioritized.

Goal #2, Activity 3. Competitive Grants

The State Library provided several grants in support of efforts to automate and/or otherwise improve the integrated library systems in Oregon Libraries. For some grant recipients, these advancements also provided for resource-sharing among libraries. These projects increase capacity to provide access to library services, materials, and information resources; aligned with the federal LSTA priority to build institutional capacity; and helped improve libraries' physical and technological infrastructure.

Warrenton Community Library and Seaside Public Library Automation and RFID Project.

Expenditure \$36,560.67 (2018)

Scappoose Public Library District and St. Helens Public Library ILS Migration/Merger.

Expenditure \$18,216.00 (2018)

Making Academic Resources Accessible: Evergreen integrated library system module — Treasure Valley Community College

Expenditure \$35,000.00 (2019)

Conversion of Rare Book Card Catalog and Collection Cataloging – University of Oregon,
Expenditure \$71,929.78 (2019)

Honor Our Past, Embrace Our Future – Harney County Library & Harney County Historical Society – joint online collections, Expenditure \$38,812.01 (2020)

The State Library provided two grants to help upgrade the technological infrastructure in two small, rural libraries. The projects below are an example of upgrades and enhancements that should be documented in a way to determine if the impact at the local level merits a statewide initiative in this area of operations.

Helix Old School Library Technology Upgrades, Expenditure \$8,084.77 (2019)
A technology upgrade at the Old Helix Grade School building to help the library provide better programming and better overall access to modern library services.

A Room for Our Tomorrows – Toledo Public Library, Expenditure \$11,084.91 (2020)
The Toledo Public Library updated their community meeting room by adding technology and hardware to encourage new uses such as small business conferencing and community education opportunities.

Additional grants related to technology and access include those below. There is an opportunity to require and expect large-scale digital collection projects to ensure the awareness and integration of the completed collections have greater impact on the statewide library community.

Bookshare For Those In Care – C. Giles Hunt Memorial Library
Expenditure \$3,105.00 (2019)
This project provided age-appropriate books and book readers for both ends of the community's age spectrum: pre-school children and seniors in their respective care facilities.

Census 2020
Expenditure \$8,578.68 (2019)
The State Library of Oregon partnered with regional U.S. Census Bureau staff to create promotional content, and to create a program to have interested Oregon libraries serve as "Census Resource Centers" for their community.

COVID-19 Technology and Capacity mini-grants
Expenditure \$24,329.16 (2019)
As the COVID-19 pandemic came to Oregon in early March 2020, the State Library realized that some previously planned activities for spring and summer would need to be canceled. LSTA funds were re-allocated to help libraries pivot to a variety of new alternative service models. These Technology and Capacity mini-grants (12 subgrants made to academic and public libraries) went to support the second LSTA goal of using technology to increase capacity to provide access to library services, materials and information resources. Libraries primarily used these funds to purchase laptops, Internet hotspots, and various supplies in order to help patrons lacking home computers and connectivity.

Vietnamese Portland: Memory, History, Community — Lewis & Clark College

Expenditures \$30,087.17 (2018)
\$42,246.00 (2019)
\$55,183.96 (2020)

Lewis & Clark College's [Vietnamese Portland: Memory, History, Community](#) provides researchers interested in Portland's Vietnamese American history with material for inquiry. This project provided access to library services, materials, and information resources; aligned with the federal LSTA priority for civic engagement; and improved users' ability to converse in community conversations around topics of concern.

Digitizing the Oregon Story: Creating Access to Significant Legal and Political Oral Histories at the Oregon Historical Society

Expenditure \$77,286.94 (2019)

The Oregon Historical Society preserved and digitized 210 interviews. Digitization and online access of these materials significantly expands access to unique primary source documentation of Oregon politics, law, and government on local, county, state, federal and international levels.

Kam Wah Chung: A Historical Archive of Chinese Medicine in Rural Oregon — Oregon College of Oriental Medicine

Expenditure \$39,214.11 (2019)

The Oregon College of Oriental Medicine and Oregon State Parks created an online digital archive that includes images and translations of various Chinese medical artifacts stored in the Kam Wah Chung & Company Museum, a National Historic Landmark, in John Day, Oregon.

Preserving the Legacy of an Oregon Artist: Making Accessible the Chuck Williams Collections — Willamette University

Expenditure \$81,156.00 (2019)

This project allowed Willamette University's archives staff to preserve, promote, and make publicly accessible the archival collections of Charles Otis "Chuck" Williams II (1943-2016, who was of Cascade Chinook descent and a member of the Grand Ronde Tribe.

Creating Pathways to Oregon Historic Landscape Architectural Collections — University of Oregon

Expenditure \$51,405.37 (2020)

The University of Oregon Libraries Special Collections and University Archives preserved, arranged, and described drawings, files, and photographs contained in the professional papers of Oregonian landscape designers Elizabeth Lord, Edith Schryver, Barbara Fealy, and Chester E. Corry.

Goal #3: Promote evidence-based practice in libraries

State Goal	IMLS Focal Area	IMLS Intent	Associated Statewide Project(s)
Promote evidence-based practice in libraries	Institutional Capacity	<p>Improve the library's physical and technological infrastructure</p> <p>Improve library operations</p>	<p>Minimum conditions for public libraries, Consulting services</p> <p>Public library statistics, Oregon Intellectual Freedom Clearinghouse, Edge, Covid-19 LibGuide</p>

Goal #3, Activity 1. Minimum Conditions for public libraries: Partially achieved

The State Librarian convened a Rulemaking Advisory Committee to guide creation of the minimum conditions that were broadly based on the "minimum requirements" listed in the Public Library Standards (September 2018) developed by the Public Library Division of Oregon Library Association. The minimum conditions became effective on January 1, 2020, as [Oregon Administrative Rules 543-010-0036](#). Data has been collected, and rules and evaluation criteria were published. Due to the pandemic, implementation has been delayed, therefore making the project partially achieved.

Goal #3, Activity 2. Consulting services: Achieved as an ongoing, successful project

Expenditures \$79,118.79 (2018)
 \$68,769.74 (2019)
 \$72,233.81 (2020)

Principally, funds devoted to consulting services provide for staff at the State Library to engage in and facilitate a cross-section of consulting activities, such as: strategic planning for public libraries; maintenance of the minimum conditions for public libraries; legal establishment of a public library; general best practices; promotion of evidence-based practice in libraries. These activities aligned with the federal LSTA priority to build institutional capacity; and improved the library workforce.

The consulting services provided by the State Library represent some of the most successful uses of LSTA funding, as each funded consultant is viewed by a significant portion of the library community as an essential resource. Opportunities for increased investment and focus are represented in the future focus report appended to this evaluation.

Goal #3, Activity 3. Public Library Statistics: Achieved as an ongoing, successful project

Expenditures \$64,199.16 (2018)
\$62,552.87 (2019)
\$75,908.91 (2020)

This project encompasses the collection of public library statistics used by local, state, and national groups for planning, advocacy, and education. Statistics are shared through the State Library website at <https://www.oregon.gov/Library/libraries/Pages/Statistics.aspx>. The project collected public library statistics and shared them throughout the State of Oregon and nationally through the Institute of Museum and Library Services' Public Library Survey.

There is great opportunity for additional statewide impact in the collection of statistics; in the focus groups, some participants would like to see the collection of public library statistics mirrored for other types of libraries across the state. Public library staff also note the challenge in easily collecting and then accessing the increasing amount of data asked for by the State library; with access to collected data through a complex Excel spreadsheet, a move towards a new method of presentation will improve access and use of the data, as demonstrated by the Oregon Public Library Snapshot (<https://public.tableau.com/app/profile/statelibraryoforegon/viz/2020OregonPublicLibrarySnapshot/2020Snapshot>).

Goal #3, Activity 6. Oregon Intellectual Freedom Clearinghouse: Achieved as an ongoing, successful project

The Oregon Intellectual Freedom Clearinghouse (OIFC) collects and compiles information about intellectual freedom issues at libraries and schools in Oregon. Under the Center for the Book program, the State Library participated in the National Book Festival in Washington D.C., and provides consultation around Intellectual Freedom issues.

Oregon Center for the Book / National Book Festival
Expenditure \$11,026.26 (2018)

Oregon Intellectual Freedom Clearinghouse
Expenditure \$4,953.38 (2019)

Goal #3, Activity 7. Edge Initiative: Achieved

Expenditures \$61,455.49 (2018)
\$59,773.31 (2019)
\$15,000 (2020)

The Urban Library Council (ULC) coordinated technology planning program Edge enables libraries to harness the power of data to make informed decisions, better serve their communities and clearly demonstrate their community leadership role. This includes the ability to assess efforts related to digital inclusion and a greater focus on outcomes. The evaluators viewed this activity as achieved due to its transition from a statewide model to a cohort-based model.

Goal #3, Activity 8. Covid-19 LibGuide: Achieved

As the COVID-19 pandemic came to Oregon in early March 2020, the State Library realized that some previously planned activities for spring and summer would need to be canceled. As part of

this revision to the use of LSTA funds, the Library deployed LSTA-funded staff time and resources to the development of a [COVID-19 set of resources](#) to help support libraries as they change their approach to serving the public during the COVID-19 pandemic.

The communication approach employed for this LibGuide and subsequent communications from the State to the library community has been viewed as one of the most successful examples of the overarching role library staff want the State Library to play.

Goal #3, Activity 9. Competitive grants

The State Library provided a cross-section of grants in support of evidence-based practices in libraries.

Moving ahead, the State Library could treat every competitive grant as an opportunity to develop a model or set of best practices which could then be applied across the library community, as appropriate.

Fostering Grade Level Reading, Year 2 — Washington County Cooperative Library Services Expenditure \$72,434.28 (2018)

The [Fostering Grade project](#) strives to increase the number of students reading at grade level by the end of 3rd grade. This grant funded a pilot project to test, evaluate, and improve the digital resources and training curriculum. This project helped promote evidence-based practice in libraries; aligned with the federal LSTA priority to build institutional capacity; and improved the library workforce.

Friends of Umatilla County Libraries - Best Practices for Friends Groups

Expenditure \$29,287.77 (2018)

This project created a set of contemporary best practices for member libraries of the Umatilla County Special Library District when working with library Friends groups. This included: recruitment strategies, development of volunteer support for library activities, and future planning practices.

Lower Umpqua Library District Strategic Planning

Expenditure \$24,999.98 (2018)

The newly formed Lower Umpqua Library District hired a consultant who completed a general needs assessment, along with an information technology assessment for the new library. This project helped promote evidence-based practice in libraries; aligned with the federal LSTA priority to build institutional capacity; and improved library operations.

Oregon Historical Documents

Expenditure \$33,798.31 (2018)

This project allowed the State Library to rehouse Oregon state government publications in protective and archivally appropriate storage as well as digitizing most of the items. This project provided access to library services, materials, and information resources; aligned with the federal LSTA priority to increase information access; and improved library users' ability to obtain and use information resources.

Goal #4: Develop information literacy skills

State Goal	IMLS Focal Area	IMLS Intent	Associated Statewide Project(s)
Develop Information Literacy Skills	Institutional Capacity	Improve the library workforce	School Library Consulting
	Lifelong Learning	Improve users' general knowledge and skills	Oregon School Library Information System (OSLIS)

Goal #4, Activity 1. School Library Consulting: Achieved as an ongoing, successful project

School Library Consulting

Expenditures \$52,933.46 (2018)
 \$49,296.51 (2019)
 \$59,312.69 (2020)

The School Library Consultant (SLC) serves as [a resource](#) to Oregon K-12 school library staff, answering questions, gathering resources, providing guidance, and tracking statewide trends. This project helped meet state goals to provide access to library services, materials, and information resources; aligned with the federal LSTA priority to build institutional capacity; and improved the library workforce. Additional language around the importance of consulting services can be found earlier in this report.

School Library Services

Expenditure \$83,693.49 (2020)

The State Library of Oregon works to support library staff in Oregon K-12 schools to improve library service to students and teachers. This year the SLC was integral in supporting school libraries during the pandemic. The State Library also gave small grants (totaling \$83,400.00) to schools and districts for school library collection development with a focus on equity, diversity, and/or inclusion.

Goal #4, Activity 2. Oregon School Library Information System (OSLIS): Achieved

Expenditures \$111,233.49 (2018)
 \$107,603.84 (2019)
 \$116,198.11 (2020)

The [Oregon School Library Information System \(OSLIS\)](#) is a website with three major components: information literacy resources to guide students and educators through the research process; Citation Maker, a template-based tool for creating a bibliography in APA and MLA formats; and a central access point for the Oregon K-12 community to statewide licensed databases. OSLIS is a project of the Oregon Association of School Libraries in partnership with the State Library of

Oregon. Content is developed, maintained, and/or contracted for by the OSLIS committee — a volunteer group of Oregon school librarians — and the School Library Consultant at the State Library.

The Oregon School Library Information System is similar to the Statewide Database Library Program and the Answerland 24/7 reference service in that all three initiatives serve as an equalizer to all Oregonians by providing a crucial shared baseline for access to information and services. Like the other two programs, the impact of OSLIS is not fully reflected in usage statistics, even as the usage of OSLIS is considerable. It should also be noted that 2020 statistics were affected by the COVID-19 pandemic, as the switch to remote learning in spring 2020 prioritized strengthening foundational learning over research projects in Oregon schools, as it did across the country.

	2018	2019	2020
Sessions	798,210	858,523	634,664
Users	516,915	542,361	404,466
Pageviews	1,624,193	1,729,986	1,293,864

Goal #4. Activity 3. Competitive grants

Connecting Library Standards to the Classroom

Expenditure \$17,977.00 (2018)

This project documented the intersection of the Oregon School Library Standards and Common Core State Standards, creating combined standards for information literacy. This effort increases awareness of the School Library Standards. The project helped meet state goals to develop information literacy skills; aligned with the federal LSTA priority to support lifelong learning opportunities; and improved library users' formal education.

It's Never Too Late to Learn: Computer Basics — Emma Humphrey Memorial Library, Vale

Expenditure \$21,070.73 (2018)

This project provided classes for adults and senior citizens to improve their overall digital literacy. It helped meet state goals to develop information literacy skills; aligned with the federal LSTA priority to support lifelong learning opportunities; and improved library users' general knowledge and skills.

Revealing the Library's Hidden Curriculum: Transparent Design in Information Literacy — Pacific University

Expenditure \$17,885.54 (2020)

This project built capacity within the Oregon academic library community to develop and deliver information literacy instruction that is informed by [transparent design principles](#). Directors from Pacific University and the University of Portland worked with a transparent design expert to convene a train-the-trainer workshop for 20 Oregon librarians.

Goal #5: Foster lifelong learning

State Goal	IMLS Focal Area	IMLS Intent	Associated Statewide Project(s)
Foster lifelong learning	Lifelong Learning	Improve users' ability to obtain and/or use information resources	Continuing Education Oregon Battle of the Books Summer Reading Program Workforce development LIS collection Youth services

Goal #5, Activity 1. Continuing education: Achieved as an ongoing, successful project

Continuing Education

Expenditures \$87,059.29 (2018)
\$77,771.26 (2019)
\$179,826.15 (2020)

The State Library provides [access to online continuing education opportunities and training resources](#), develops and makes available self-paced tutorials, promotes live and recorded webinars and conferences, curates a collection of professional books and periodicals available to all library workers in the state, and provides scholarships to library staff to offset travel and registration costs for professional development opportunities.

Further suggestions for areas of focus for continuing education can be found in the Continuing Education Needs Assessment developed by independent consultants Gerding and Hough for the State Library in March 2021 as well as in the "Building the Foundation" section which addresses future directions for the next Five-Year Plan. Information from the needs assessment, evaluation survey, and evaluation engagement are in strong alignment, echoing a desire for equity, diversity, and inclusion training and a desire for related training.

Goal #5, Activity 2. Oregon Battle of the Books: Achieved as an ongoing, successful project

Expenditures \$70,600.00 (2018)

\$10,600.00 (2019)

The [Oregon Battle of the Books](#) is a statewide, voluntary reading promotion program for students in 3rd-12th grades. The specific objectives of this project are to continue to improve Oregon Battle of the Books statewide, with particular emphasis on management meetings, supplies, and location/contractual fees. This project helps meet state goals to foster lifelong learning and is aligned with the federal LSTA priority to support lifelong learning opportunities and improve library users' general knowledge and skills. The LSTA funding contributed to the Oregon Battle of the Books represents only part of the overall program funding.

COVID-19 disrupted the implementation of this program as it relies on considerable face to face contact. Funds intended for Oregon Battle of the Books were re-deployed for mini-grants that helped provide much-needed support to libraries as they adjusted service delivery during the pandemic. Battle of the Books is still a necessary and important program to the Oregon library community. Future funding could support both the program and the development of a model for its virtual implementation.

Goal #5, Activity 3. Summer reading program: Achieved as an ongoing, successful project

The summer reading program activity is addressed in Goal #3 Activity 6; Goal #3 Youth Services Consulting and the Youth Services Best Practices projects both intersect with this goal.

Goal #5, Activity 4. Workforce development: Partially achieved

During the onset of the COVID-19 pandemic, the State Library used CARES Act funds to provide considerable programming to support workforce development. These programs constitute a modification of the LSTA five-year plan, and detailed further in the answer to question B-2, in the next section of this evaluation report.

It has been challenging to engage libraries in this area, though the State Library has been successful in fostering relationships between Oregon Worksource offices and libraries. The State Library provided \$15,000 (2019) and \$13,771 (2020) to fund library collaborations with local WorkSource offices or community organizations to support job seekers and those seeking workforce development training. Funds were spent on online learning tools for job seekers.

Goal #5, Activity 5. LIS Collection: Achieved as an ongoing, successful project

The State Library provides access to online professional development and training resources, promotes webinars and conferences, curates a collection of professional books and periodicals available to all library workers in the state, and provides scholarships to library staff to offset travel and registration costs for professional development opportunities. The [LIS Collection](#) financials are summarized under Goal #4 Activity 1, which intersects with this goal.

Goal #5, Activity 6. Youth Services Continuing education and Consulting: Achieved as an ongoing, successful project

Youth Services Consulting

Expenditures \$127,895.73 (2018)
\$105,823.67 (2019)
\$179,570.40 (2020)

The Youth Services Consultant provides public libraries resources, training, and consulting to implement summer reading, outreach to under-served youth, and early literacy training for caregivers. During the pandemic the Consultant hosted office hours, purchased summer reading manuals, led a "Transforming Teen Services" course; and administered a Teen Services grant for libraries.

Goal #5, Activity 7. Competitive grants

The State Library provided grant support to three libraries that created projects to develop programs around science, technology, engineering, art, and math (STEAM). These projects helped meet state goals to foster lifelong learning; aligned with the federal LSTA priority to support lifelong learning opportunities; and improved library users' formal education.

Community Math Outreach — Waldport Public Library Expenditure \$8,332.40 (2018)

The Waldport Public Library launched a series of STEM programs and services to bring up mathematical proficiency scores of current and future south Lincoln County youth, and foster a community of math-mindedness, making success in STEM programs and work attainable through confident skills.

Library Night at the Maker Space — Independence Public Library

Expenditure \$16,400.00 (2018)

This project opened the STREAM Lab (Science, Technology, Reading, Engineering, Art, Math) makerspace at the Henry Hill Educational Support Center two nights a week for use by the general public.

Roseburg Public Library STEAM Programming Expenditure \$24,757.14 (2020)

Roseburg Public Library organized STEAM (Science, Technology, Engineering, Art, and Math) programs for K-12 students in the local area.

Dolly Parton Imagination Library support— Wilsonville Public Library

Expenditure \$18,869.46 (2018)

The Wilsonville Public Library Foundation received a grant to purchase 40 sets of promotional materials from the Dollywood Foundation for use as they work to sign up kids in their areas.

COVID-19 Youth Programming Expenditure \$63,110.04 (2019)

As the Covid-19 pandemic came to Oregon in March 2020, the State Library re-allocated funds to support library summer reading programming efforts during times when social distancing measures have been in place, through the creation of mini-grants (up to \$3,000) for materials such as grab-and-go kits, literacy support items, and craft supplies.

Linn County Community Literacy Partnership

Expenditure 2019 \$78,964.48
2020 \$85,628.08

This [Literacy Partnership](#) project creates an ongoing partnership between Linn Benton Community College, the Linn Libraries Consortium, the GED Network, and local non-profit organizations to provide tutoring for Linn County residents with low literacy. An online presence and a viable bilingual website (<https://www.literacy.linnlibraries.org/>) were also developed.

Laptop Lab To Go — Mt. Angel Public Library

Expenditure \$13,988.74 (2020)

The Mt. Angel Public Library designed this project to provide free computer/technology classes in the library and around the community to seniors.

A-3. What groups represented a substantial focus for your Five-Year Plan activities?

Children (aged 0-5) and School-aged Youth (aged 6-17)

Children (aged 0-5) and School-aged youth (aged 6-17) were a substantial focus. For the Federal Fiscal Years 2018-2020, the State Library of Oregon used more than ten percent of the total amount of resources committed by the overall plan across multiple years for programs and services that have a focus on this population.

These programs include:

Statewide Database Licensing Program (SDLP)*	\$2,233,531.66
Sage Courier Subsidy*	\$177,701.09
Oregon Digital Library Consortium (ODLC)*	\$209,500
Answerland*	\$34,9932.44
Youth Services Consulting	\$413,289.37
School Library Consulting	\$192,302.69
Oregon Battle of the Books	\$81,200
Oregon School Library Information System (OSLIS)	\$335.035.44

**While not broken out, the SDLP, Sage Courier Subsidy, ODLC, and Answerland serve all populations, Children (aged 0-5) and School-aged youth (aged 6-17) are part of the target audience.*

Library Workforce

The Library Workforce was a substantial focus. For the Federal Fiscal Years 2018-2020, the State Library of Oregon used more than ten percent of the total amount of resources committed by the overall plan across multiple years for continuing education and consulting for the Library workforce.

Continuing education	\$344,656.70
Consulting services	\$794,954.80

B. Process Questions

B-1. How have you used any data from the State Program Report (SPR) and elsewhere (e.g., Public Libraries Survey) to guide activities included in the Five-Year Plan?

Data from the State Program Report is used as one might anticipate. For example, State Library staff, the LSTA Advisory Council, the Statewide Database Licensing Advisory Committee, and periodic task forces recommended changes to the State Librarian and the State Library Board when changing circumstances indicated they were necessary.

However, as noted throughout this evaluation, the data that is collected through the State Program Report often does not accurately reflect the impact of the work conducted. As one State Library staff member commented, the State Library "need[s] to use [the plan and data] as a tool to communicate and demonstrate our value." The IMLS also has the opportunity to develop meaningful outcomes measurements that more accurately reflect the work happening in libraries across the nation.

Taking the SDLP as an example, the next plan should make clear what the true goals of the program are. Does the State Library focus on a core set of materials that are useful to all, or run an active procurement program that meets the varied needs of the library community? There is currently a lack of clarity on the program goals in the library community. Engagement with the library community indicates that it clearly expects the project to move away from standard numeric output measures as a way to evaluate the program. They would like the State Library to provide added support to increase individual library staff understanding of the current resources, which will help to maximize their impact. When surveyed K-12 school and college/university library staff express the strongest interest in expanding resources, much more than public libraries. Responding to these expressed needs suggests new directions for the project's advisory committee.

B-2. Specify any modifications you made to the Five-Year Plan. What was the reason for this change?

Changes in leadership at the State Library has meant the 2018-2022 Five-Year Plan was modified informally. The plan is perceived to have "stayed in alignment at a macro level, but with changes at the program and initiative level," as one State Library staff person shared.

While the plan is viewed as having some helpful framing language, it was not connected to the agency's new [strategic plan \(2020-2023\)](#), and staff were challenged to ensure LSTA-funded areas of focus fit into a bigger strategic need and to envision LSTA-funded work as forward thinking or meeting future needs. There is now opportunity to ensure the new Five-Year Plan is truly updated to better reflect the environment, not only within the agency, but within the Oregon library community, and support the priorities of the strategic plan. In practice, the elements of the Five-Year Plan, where possible, were modified to serve as more than a document reflecting a certain point in time in Oregon libraries.

As the COVID-19 pandemic came to Oregon in early March 2020, the State Library realized that

some previously planned activities for spring and summer of that year would need to be canceled, and those LSTA funds would need to be reallocated quickly. As libraries struggled to pivot to a variety of new alternative service models, the State Library redirected some LSTA funding to offer mini-grants of up to \$3,000 for a number of purposes.

- **Youth Programming mini-grants** (34 subgrants made to 29 school and public libraries) went to support the fifth LSTA goal to foster lifelong learning. By and large, libraries used these funds to purchase supplies and materials to support grab-and-go and/or socially-distanced summer reading programs for youth. A total of \$63,110.04 was granted.
- **Technology and Capacity mini-grants** (12 subgrants made to academic and public libraries) went to support the second LSTA goal of using technology to increase capacity to provide access to library services, materials and information resources. Libraries used these funds mostly to purchase laptops, internet hotspots, and various supplies to help patrons lacking home computers and connectivity. A total of \$24,329.16 was granted.
- **Collection Development mini-grants** (49 subgrants made to 23 community college and academic libraries, public libraries, and school districts) went to support the first LSTA goal of providing access to library services, materials and information resources. Libraries used these funds to add e-book content and other resources to their collections. A total of \$140,425.11 was granted.

In addition to the LSTA funds, the State Library used CARES Act funds to:

- Assist libraries in providing workforce development services needed by communities during the pandemic. Projects included: forming partnerships with local workforce development agencies and organizations, piloting job-related online tools at public and academic libraries, and mini grants to libraries for workforce development partnerships and activities. Together these projects improved local libraries' ability to assist and provide services for local users in need of workforce development support. Approximately 25% (\$27,435.77) of the \$104,284.84 expenditure was funded by LSTA monies.
- Offer non-competitive subgrants to 55 public, tribal, and community college libraries in Oregon. These libraries were selected based on IMLS' three suggested criteria to identify areas of highest need. Each library was allocated a \$2,000 minimum grant, and the remainder was distributed based on service population.
 - 24 public libraries used their allocation to support library services during the pandemic. This included purchasing Personal Protective Equipment (PPE) and extra computers to reopen library spaces while keeping patrons and staff safe; increasing staff capacity through training on COVID-19 guidance; providing youth and adult programming online; and extending Wi-Fi coverage and establishing videoconferencing stations to increase digital access for patrons. Expenditure: \$84,348.16
 - One multi-branch county library used their allocation to purchase a Direct Access to Resources and Technology (DART) van that serves as a mobile hotspot and is equipped with ten laptops and fifteen tablets that patrons can check out to use on site. The van travels around the county providing internet access, and offering digital literacy programs for seniors, work readiness workshops for job seekers, and general library instruction for all patrons. The van also served as a free lunch site at area schools during the summer. Expenditure: \$88,497.00

- 21 public libraries, 4 community college libraries, and 1 tribal library used their allocation to increase information access and connectivity in their communities. This involved growing their online collections and lending Wi-Fi hotspots, laptops, and tablets. Expenditure: \$131,413.43

B-3. How and with whom have you shared data from the SPR and from other evaluation resources? How have you used the last Five-Year Evaluation to inform data collected for the new Five-Year Evaluation? How have you used this information throughout this five-year cycle?

The data collected through the SPR is typically made available publicly, though not in an as easily accessible compilation as the SPR. This data, as well as other evaluation resources developed by and for the State Library, tends to be shared broadly with the library community through listserv announcements and through publication on websites, including the State Library's website. It should be noted that members of the library community commented on the need to improve the State Library's website overall, including access to State Library projects and initiatives.

As mentioned in B-1, while the data collected is shared in traditional methods — including reports to the State Library Board, the LSTA Advisory Council, the Statewide Database Licensing Committee, and other volunteer groups supporting LSTA-funded initiatives — the data collected from the last Five-Year Evaluation was insufficient for meaningful impact on this five-year cycle as well as in its evaluation.

C. Methodology Questions

C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of an Independent Evaluator.

The State Library developed a Request for Proposal with details of the project and requirements for the evaluator. After the solicitation ended, State Library staff reviewed the submissions to judge the evaluators' ability to implement the project in a manner consistent with IMLS requirements. The State Library then selected the Constructive Disruption team of Stephanie Chase and Judah Hamer based on their professional knowledge and expertise, particularly around qualitative and quantitative data collection and analysis expertise, significant strategic planning expertise, their focus on research justice, and Stephanie's local connection as a fellow member of the Oregon library community.

C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.

The Constructive Disruption team applied multiple data collection methods. These methods include document review, interviews, a survey, open attendance virtual town halls, and focus groups. These multiple methods and their respective analytic components provided for a triangulation of data, in support of the development of robust and reliable answers to the IMLS evaluation goals and objectives.

C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation. How did you engage them?

The State Library of Oregon deliberately focused on the expectations and perceptions of members of the Oregon library community, most clearly defining the major stakeholders as library staff across the state, and across library types and staff roles.

The core values of the International Association of Public Participation were used as a guide for engagement priorities. This means that active participation from library staff was sought during the process. Staff engagement places a direct value on the voices and perspectives of the people who do the work as part of the activity of evaluating. As a result of this approach, the evaluation itself reflects back to staff how their input impacted its shape and form.

Multiple modes of participation were developed, including an anonymous survey, 20 hours of invitation-only small focus groups and interviews, five open virtual town halls, and an opportunity for independent contributions. Participants in each focus group or town hall were also able to contribute to the collaborative note taking documents following the session.

To ensure equitable representation, Constructive Disruption applied the concept of community-based participatory action research and data and research justice to the process. Oregon-based Coalition of Communities of Color describes research justice as "a strategic framework that seeks to achieve self-determination for marginalized communities. It centralizes community voices and leadership in an effort to facilitate genuine, lasting social change... Community members are experts and [BIPOC community members in particular] already have the capacity to conduct critical and systemic inquiry into their own lived experiences."

Constructive Disruption worked with the Library Support and Development division of the State Library to build research justice into the engagement process. As part of this, staff members helped to identify people in the community whose experiences and perspectives historically may be under-represented. This inclusion effort was part of a strategy to involve typically overlooked people in the evaluation process, through surveying, town hall engagement, and focus groups. By actively seeking wider representation, this evaluation process created room for new priorities and perspectives to emerge.

C-4. Discuss how you will share the key findings and recommendations with others.

The findings of the evaluation process will shape the development of the new Five-Year Plan, which will be developed by State Library staff. The Oregon library community expects open, collaborative communication about the planning process. This expectation is in alignment with the State Library's commitment to communicating to the community.

APPENDIX A: ACRONYMS

ALA: American Library Association

ARPA: American Rescue Plan Act

BIPOC: Black, Indigenous, people of color

CARES: Coronavirus Aid, Relief, and Economic Security [Act]

CTE: career technical education

DART: Direct Access to Resources and Technology

DPLA: Digital Public Library of America

EDIA: equity, diversity, inclusion, and antiracism

IFLA: International Federation of Library Associations and Institutions

LEO: Libraries of Eastern Oregon

Lfo: Libros for Oregon

LSSC: Library Support Staff Certification

LSTA: Library Services and Technology Act

OA: Open Access

OCCLA: Oregon Community College Library Association

OCCLL: Oregon Council of County Law Libraries

ODE: Oregon Department of Education

ODLC: Oregon Digital Library Consortium

OER: Open Educational Resources

OLA: Oregon Library Association

OLA EDIAC: Oregon Library Association Equity, Diversity, Inclusion and Anti-Racism Committee

ONDP: Oregon Digital Newspaper Project

OSLIS: Oregon School Library Information System

PPE: Personal Protective Equipment

SDLP: Statewide Database Licensing Program

SLC: School Library Consultant

SOLF: Southern Oregon Library Federation

SPR: State Program Report

STEAM: Science, Technology, Engineering, Art, and Math

STEM: Science, Technology, Engineering, and Math

STREAM: Science, Technology, Reading, Engineering, Art, and Math

ULC: Urban Library Council

APPENDIX B: LIST OF PEOPLE INTERVIEWED

State Library Staff, Library Support and Development Division

Greta Bergquist
Jennifer Cox
Ross Fuqua
Darci Hanning
Jen Maurer
Buzzy Nielsen
Tamara Ottum
Arlene Weible
Ferol Weyand

Members of the State Library Board

Leslie Howerton
Sean Nickerson
Tina Roberts
Jonathan Scrimenti
Ben Tate
Jennie Tucker
Lori Wamsley
Greg Williams
Kristin Williams

Town Halls & Focus Groups

40 unique members of the Oregon Library Community participated in the open virtual town halls, including several with statewide or association responsibilities, such as former State Librarian (and current Director at Lincoln County Library District) MaryKay Dahlgreen, Oregon Library Association Past President and Josephine Community Library District Director Kate Lasky, and Richard Sapon-White, member, North American IFLA Council and Head, Cataloging Unit, Oregon State University Libraries.

A full list of focus groups can be found in Appendix C. Participants included:

- Paul Addis, Reference Librarian, Coos Bay Public Library
- Kristine Alpi, University Librarian, Oregon Health and Sciences University
- Michelle Bagley, Library Dean, Portland Community College
- Amber Boedigheimer, Librarian, Linn County Law Library
- Ericka Brunson-Rochette, Community Librarian, Deschutes Public Library

- Kimberley Carroll, Interim City Librarian, Salem Public Library
- SD DeWaay, Library Department Chair, Clackamas Community College
- LaRee Dominguez, Library Resource Coordinator, Albany Public Library
- Todd Dunkelberg, Director, Deschutes Public Library
- Brynn Fullmer, LSTA Council member representing library users
- Shawna Gandy, Library Director, Oregon Historical Society
- Michael Grutchfield, Area Manager, Jackson County Library Services
- Karen Hill, Director, Cornelius Public Library
- Tina Hovekamp, Library Director, Barber Library, Central Oregon Community College
- Jane Ellen Innes, Director, Jefferson County Library District
- David Isaak, Director of Collection Services, Reed College
- Darlyne Johnson, Director, Ontario District Library
- Nathalie Johnston, Director, Klamath County Library Service District
- Laura Kimberly, Director, Newport Public Library
- Kelly Knudsen, Library Director, Warrenton Community Library
- Beth Longwell, Systems Manager, Sage Library System
- Kari May, Library Director, Jackson County Library Services
- Dan McClure, Director, Dora Badollet Library, Clatsop Community College
- Erin McCusker, Director, Umatilla County Special Library District
- Jennifer McKenzie, District Teacher-Librarian, Siuslaw School District
- Jackie Mills, Director, Mt. Angel Public Library
- Janna Moser, Director, Stayton Public Library
- Louise Meyers, LSTA Council member representing library users
- Will O'Hearn, Director of Library Services, Eugene Public Library
- Mark Peterson, Faculty Librarian, Collection Development, Mt Hood Community College
- Sami Pierson, Director, Coos Bay Public Library
- Jordan Popoff, Catalog Librarian, Curry Public Library
- Marci Ramiro-Jenkins, Reference Librarian/Latinx Outreach Coordinator, McMinnville Public Library
- Gesse Stark-Smith, Community Outreach Librarian, Multnomah County Library
- Perry Stokes, Library Director, Baker County Library District
- Lee Van Duzer, Law Librarian, Washington County
- Kelda Vath, Assistant Director of Support Services, Jackson County Library Services
- Kris Wiley, Library Director, Roseburg Public Library
- Brittany Young, Law Librarian, Lane County Government

One-on-One Interviews, Private Funders

Erin Borla, Executive Director and Trustee, Roundhouse Foundation

Nathan Schult, Program Officer for Youth Development and Education, Ford Family Foundation

APPENDIX C: LSTA FOCUS GROUPS AND NOTETAKING JAMBOARDS

- Community Colleges:
https://jamboard.google.com/d/1INToiYSRiokWwMahVidm8NRYFmiWsxPo8LnI3_ga9SE/viewer
- Eastern Oregon library leaders:
https://jamboard.google.com/d/1jKPTGvQxFCfPkkiXVNA-A3DsaoDlk3u-4q6_i4_A_Jo/viewer
- Large Public Libraries:
https://jamboard.google.com/d/1ATg_HTwmmecBE9NbeDJGmrNYm-a9CqcSQ3oDAKOLs8c/viewer?f=3
- LSTA Council:
<https://jamboard.google.com/d/1uCl5omAgyA88z2XBxfB6Wmb9ZtgB-41iAoQjLnGofRs/viewer>
- Most Diverse Cities:
https://jamboard.google.com/d/1bg-UeOuzsoQ_lilzO-ghqhNW86SWOZEuqcd74-lAAY/viewer
- OLA Equity, Diversity, Inclusion, and Antiracism Committee,
https://jamboard.google.com/d/1AO4oY67NM5_5Viq1FKijPi1d71C5Y6CoCh7a8pxo_ZM/edit?usp=sharing
- School Libraries/Teacher Librarians:
<https://jamboard.google.com/d/19KA9kHVLb2m-ujgidJvFcdkaz27cKay1EDUJiBT0Xnc/viewer?f=0>
- Smallest Libraries:
https://jamboard.google.com/d/1acAGrpjZ_l9Xxp-XygHASxA-qWjKhENnL-eE6UwUrgA/viewer
- Southern Oregon Library Federation Leadership:
<https://jamboard.google.com/d/1qjze6E-EKKmUkWvARU4E-SMgzhtyShR-ufdQpX6qjio/viewer>
- Special Libraries:
https://jamboard.google.com/d/1cBH2brSfnPqBl5wOxRyE8erWYIO9gZt8iSa6WXE8_Po/viewer

APPENDIX D: BIBLIOGRAPHY OF ALL DOCUMENTS REVIEWED

LSTA Documents

- Oregon State Library LSTA Five-Year Plan, 2018-2022
- IMLS Grants to States Program Report – State Library Dashboard for Oregon – Project Lists – Each project entry was reviewed and evaluated. When a project had external links to demonstrate project products/outcomes, those links were checked and reviewed.
- Evaluation of the Oregon State Library's 2013-2017 LSTA Five-Year Plan
- IMLS Travelogue: Preparing for the 2018-2022 Five-Year Evaluation
- IMLS Guidelines for IMLS Grants to States Five-Year Evaluation

State Library of Oregon Documents

- State Library Projects – LSTA Goals Crosswalk
- State Library of Oregon website pages
 - Consultative services and continuing education webpages on the State Library site
 - Library & Information Science Collection webpage
 - Oregon Intellectual Freedom Clearinghouse webpage
- Statewide Database Licensing Program (SDLP) documentation
 - Usage reports 2017-2020
 - Procurement reports
 - Annual reports
- Answerland.org website detailing all aspects of the service, including annual reports
- Oregon School Library Information System (OSLIS) website and subpages
- Oregon Battle of the Books website and subpages
- Questions/Answers emails from State Library consultants for specific information requests, such as usage statistics.
- Current State Library Strategic Plan
- Continuing Education Needs Assessment (report, data, and executive summary) developed by Gerding and Hough

APPENDIX E: RESEARCH INSTRUMENTS FOR SURVEYING, INTERVIEWING, AND/OR USE OF FOCUS GROUPS

Appended to this report includes:

- PDFs of the slide decks containing discussion prompts and interview questions for both the virtual town halls and focus groups;
- Breakout/participant guides for the virtual town halls and focus groups;
- PDF of the compiled contributions across focus groups related to equity, diversity, and inclusion efforts;
- Guide for independent contributions;
- Survey questions;
- Report of survey findings.

APPENDIX F: BUILDING A FOUNDATION FOR THE NEXT FIVE YEAR PLAN

Overview

Building a Foundation for the 2023-27 LSTA Five-Year Plan: Starting with Strengths

Value of State Library Staff

Connecting Libraries

Statewide Programs: SDLP and OSLIS

Awareness Building and Demonstrating Value

To Keep in Mind for the Next Five-Year Plan

Opportunities for the State Library of Oregon in the Next Five-Year Plan

Supporting Equity, Diversity, Inclusion, and Anti-Racism Work in Libraries

Anti-Racism and EDIA

Equity in Geographic Service Access

Communication: Reaching Out Beyond Library Directors

Direct Connection with Library Support and Development Services Staff

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Reviewing the Granting Process with Equity in the Lead

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Broader Plan Opportunities in the IMLS Grants to States Focal Areas and Intents

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Digital Equity

Institutional Capacity: Improve Library Operations

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Economic and Employment Development

Youth Workforce Development

Human Services

Including Families in Youth Programming and Outreach

Notes on Reporting for the Future

In Conclusion

Overview

As part of the 2018-2022 Library Services and Technology Act (LSTA) Five-Year Plan evaluation process, significant attention was paid to collecting the aspirations and opportunities for the State Library of Oregon from the Oregon library community. Tools used as part of the evaluation process — including a survey distributed statewide, focus groups, interviews, open virtual town halls, and independent contributions from members of the library community — allowed participants to share their thoughts on the future work of the State Library of Oregon. The opportunities for the State Library to explore in the next five-year plan were remarkably consistent across the engagement methods, pointing to a consistency of mission and the strength of the investments made by State Library staff and programs in the Oregon library community.

Members of the Oregon library community expect the State Library to maintain the high level of service it currently exhibits; the expectations for the members of the Oregon library community might best be summarized as “keep doing what you do, but even better.” For example, while members of the library community highlighted the high level of support and communication for different library types, library staff would like to see the State Library work outside of the silos of library type, and “broaden out to the library community as a whole, [to] support the *ecosystem* of libraries,” as one community college librarian shared, working across library types and geography, bringing libraries of different types together. Library staff across library types and sizes see the State Library as a critical partner in collaborative work and uniquely positioned to push the library community to be more collaborative as well as to help libraries be more present, visible, and valued in their communities.

Oregon library staff feel the opportunities for innovation and exploration in pilot projects and LSTA grant funding are valuable (“grants and pilot programs spark creativity”) and want to see those opportunities more broadly shared and open to more participants through a reduction in barriers.

Strengths of the State Library highlighted by members of the library community mostly focused on:

1. The value of the State Library staff;
2. The important and influential role the State Library plays in connecting libraries across geography, service population, library size, and library type;
3. The consistently high level of involvement and reliability.

The library community expects the State Library to continue to strengthen their offerings in the areas listed above, continuing to prioritize direct library expertise, personal connection to

the library community, and a high level of engagement in the library community in the State Library staff, working to bring libraries together across the state.

Opportunities for the State Library of Oregon in the next Five-Year LSTA Plan most clearly highlighted by members of the Oregon library community are:

- **Continue and deepen** the State Library's **high level of engagement and connection** with the library community;
- Continuing to connect libraries across geography, service population, library size, and library type, **investing in projects with impact across groups**;
- Actionable investment in **equity, diversity, inclusion, and antiracism** initiatives;
- Supporting libraries with the tools they need at the local/organizational level to **increase general awareness and visibility of libraries and library services**
- **Overcoming perceptions** around processes, particularly the competitive grant process, to increase participation.

In addition, there are opportunities that specifically address several IMLS Focal Areas and Intents:

- **Information Access**, particularly **digital equity** and supporting physical collections in schools;
- **Institutional Capacity: Improving Library Operations**, particularly in closely pairing training with standards or best practices and potentially expanding the reach of statistics;
- **Economic and Employment Development**, with a focus on youth workforce development;
- and **Human Services**, by supporting projects that include families in youth programming and outreach.

Each of these areas are explored in more detail in this report.

Building a Foundation for the 2023-27 LSTA Five-Year Plan: Starting with Strengths

As part of the evaluation process for the 2018-22 LSTA Five-Year Plan, members of the Oregon library community were asked to share their thoughts on areas of focus for the next plan. Participants were asked what successes the State Library of Oregon should carry forward, building a foundation for future work on the successes of the State Library. Comment was relatively consistent across groups, highlighting:

- The value of the State Library staff;
- The important and influential role the State Library plays in connecting libraries across geography, service population, library size, and library type.

Throughout, the State Library's consistent high level of involvement and reliability across initiatives was acknowledged and celebrated.

Value of State Library Staff

Again and again, State Library staff were mentioned as one of the greatest strengths of the organization's offerings. As phrased by an Eastern Oregon library leader, "the [State Library] staff connections with library staff" are viewed as an incredible strength, as is the State Library staff's "expertise and specialization," as the director of one large public library shared. Academic and public libraries particularly viewed it as incredibly valuable to have State Library staff with prior experience working in libraries.

"Staff support from the consultants is invaluable," shared one library director. Staff are "easy to reach out to," "amazing," "responsible," "knowledgeable," and "recogn[ize] the situations and resource needs of ... libraries." Each consultant was mentioned by name at some point throughout the focus groups. The State Library "staff is willing to try new things and support libraries that are doing the same." Members of the library community would like to see more consultants on staff, with more specific expertise, with the most requests focusing on a consultant to support equity, diversity, inclusion, and antiracism work throughout libraries in the state.

Connecting Libraries

Members of the Oregon library community appreciate the place the State Library occupies as a connector between library types, "providing opportunities for different library types to collaborate and connect on projects," as one academic library staff member shared, and for the ability of the organization to push out communication widely, even as participants highlight the challenge at the local level of ensuring that communication reaches beyond

the directors or library staff with high levels of awareness of the State Library. Directors at some of our largest public libraries expressed this as the “role [the State Library of Oregon plays] in convening conversations... bringing voices [together] across the state.” A special library staff member commented on the role the State Library has in “highlighting our connections and similarities.”

A community college librarian shared that the State Library should “continu[e] to think about how connected our libraries are, leverage strengths, and cooperate across the state,” with a colleague asking the State Library to “root the ethos of partnership” in libraries.

Statewide Programs: SDLP and OSLIS

The Statewide Database Licensing Program (SDLP) may be the strongest example of this cross-silo service for libraries in Oregon, particularly when combined with the services of the Oregon School Library Information System (OSLIS). When referring to the SDLP and OSLIS, community members appear to be speaking of the Gale suite of databases in particular, rather than Learning Express, which was not specifically mentioned. Statewide database access and the SDLP are the services members of the library community are most able to connect to LSTA funding, receiving more than double the mentions of the competitive grants program. This increases to 50% more mentions when OSLIS is included. One licensed school librarian summed it up best: the SDLP is the “great equalizer.”

Praise for the SDLP fell into three areas:

- It “provides access to much needed resources ... that many small/rural libraries (amongst others) may not otherwise be able to offer access to”; “essential — otherwise unable to afford”
- Continuity between school and community colleges
- Allows libraries, particularly academic libraries, to focus their spending elsewhere.

The SDLP/OSLIS is also a great example of an appreciated and well-used program that library staff would like to “get even better.” Licensed school librarians in particular requested “continued expansion of the databases and ebooks... updat[ing] the Gale databases... add[ing] new materials across all ages, not just encyclopedias [and] funding for digital audiobooks.”

Two areas for growth with the databases are in service to schools whose library is staffed with classified school library staff, with the need to get training to those schools (classified school library staff, teachers, students) on the databases, and for access to a baseline of more rigorous or academic database resources to assist students with research.

Awareness Building and Demonstrating Value

The leadership role the State Library played during the ongoing COVID-19 pandemic has been highlighted as an example of the kind of communication members of the library community would like to see more of from the State Library. An Eastern Oregon library

leader shared the strength of the State Library's "broad forward thinking — bigger picture ... small libraries have so much in the day-to-day."

Across library types, the strength of the State Library as an advocate was referenced. The State Library is "an advocate AND a resource," as one member of the Southern Oregon Library Federation (SOLF) highlighted, with another mentioning "the State Library is in our corner [with] their advocacy." In these instances, as throughout the focus groups in particular, members used "advocacy" as shorthand for activities that were about awareness building and demonstrating value: "continuing to build the good face of libraries [and the] importance of libraries," as one Eastern Oregon library leader shared. Directors at some of our largest public libraries noted the importance of the State Library "representing libraries at the state level."

One specific request of academic and community college library participants in awareness building is for the State Library to be more involved in "support for OER (Open Educational Resources)... OA (Open Access) and textbook affordability."

As one town hall participant shared, discussing the collaborative power of the State Library to build awareness, "some communities of librarian types (e.g. licensed school librarians; tech services staff) are seeing their number dwindling, their workloads increasing, and hence their ability to engage with the larger librarian community in Oregon and beyond significantly curtailed, through no fault of their own. As their numbers and ability to engage decrease, their voice(s) can be lost or minimized, again through no one's fault. The State Library of Oregon could help ensure these communities, who need our support more than ever, continue to have a voice and representation in discussions about needs, priorities, and funding opportunities." This is echoed by a State Library staff person: "more than ever, we need to support a library's capacity to partner."

State Library staff also value the relationships they are able to build with the library community and view the investment it takes to build and maintain these relationships as valuable. The personal connections and individual outreach play a large, yet undocumented, role in the success of programs. As one staff person said, the State Library should and can serve as the "warm hug" to welcome new members to the library community.

To Keep in Mind for the Next Five-Year Plan

The State Library should strive to keep a statewide perspective, capitalizing on its big-picture view and promoting equitable service among libraries. Members of the Oregon library community expect the state to be acting as a connector, bringing together good ideas across libraries and keeping a keen eye open for opportunities that would either benefit the widest possible range of libraries or which very specifically invest in areas of the greatest need.

Library staff see this type of activity as both beneficial and successful, as it provides resources to those who would otherwise not have access and frees up other libraries to refocus their resources. Participants in the engagement sessions recognize that some libraries and library types need additional focus and support — most notably, school libraries and libraries serving small, rural communities — and want to see the State Library invest more heavily in these areas.

Opportunities for the State Library of Oregon in the Next Five-Year Plan

As with the strengths of the State Library, members of the Oregon library community were strikingly in alignment regarding the opportunities for the State Library to explore in the next Five-Year LSTA Plan. These opportunities for focus and growth reflect areas where the State Library could make further investment, refine their current work, or continue to build on work already underway:

- Supporting Equity, Diversity, Inclusion, and Anti-Racism work in libraries;
- Rethinking and re-approaching communication with the library community to expand beyond library directors;
- Reviewing the LSTA granting process with equity at the forefront.

Supporting Equity, Diversity, Inclusion, and Anti-Racism Work in Libraries

By far, the greatest opportunity for the State Library of Oregon is in supporting, advancing, and advocating for equity, diversity, inclusion and antiracism (EDIA) work in libraries.



EDIA-related suggestions from across focus groups; PDF included in the evaluation report appendices

Anti-Racism and EDIA

Library staff across library types, regions, and job classifications want to see strong and sustained action in this area from the State Library, including supporting the work of Black, Indigenous, and people of color (BIPOC) library staff already underway, such as the work of the Oregon Library Association's (OLA) Equity, Diversity, Inclusion, and Anti-Racism Committee (EDIAC) and the EDIA Toolkit. The work of the State Library with the development of the toolkit is seen as a real strength to build on; "[former State Librarian] Jennifer [Patterson]'s leadership and humility," the "equal sense of urgency", and the true feeling of collaboration in this process were highlighted by OLA EDIAC members as part of why the project was such a success.

The need for support in EDIA was clear in the survey results as well, rising to the top across all library type groups. All groups are interested in better serving underserved populations, which were broadly self-reported as populations of color. School library staff (both licensed school librarians and classified school library staff) mentioned the need for support for low-income students, Latine students, and, broadly, their students of color, particularly in having up to date collections and in centering the library as a welcoming space. Public libraries also similarly reported in the survey the need for help in centering the library as a welcoming space, serving underserved populations, and reaching patrons outside the library. Public libraries report the need for assistance in supporting incarcerated populations, immigrant populations, migrant workers, low-income families, patrons experiencing homelessness, people with disabilities, and neurodiverse library users, particularly those in crisis. As with school library staff, public libraries placed the need for additional support in reaching out to Latine populations as a top priority.

Traditional library leadership, which presented as white in focus groups and town halls, also expressed the need for assistance in how to meaningfully address EDIA within the profession, recruiting and retaining BIPOC staff in positions throughout an organization.

Actions in EDIA need to be paired with clear outcomes; for example, as one academic library staff person shared, "have accountability [for libraries and grants] directly tied to EDIA/antiracist policies, practices and procedures," as well as increased professional development opportunities. Increased access to professional development should come with support to reduce barriers to attendance, such as funding substitute coverage or paying or reimbursing for the time to attend, and travel.

The library community expects (and needs) the State Library, in partnership with OLA and other groups, to lead with equity at a statewide level, and to model equity in their practices. As one State Library staff person mentioned, there needs to be "more social justice elements added into the State Library's work] — showing, encouraging, empowering... libraries to examine how they can be better. [We need to] model the power of connection and partnership."

Equity work must start with the State Library itself; for example, there is a strong sentiment that the next Five-Year Plan should center equity in all decision-making related to this funding. The development of a mission statement for grantmaking, for example, could be a powerful tool for ensuring equity is at the forefront of allocating funds.

Equity in Geographic Service Access

While the State Library has significantly invested in increasing access to library services for Oregonians, closing the gap remains of interest to the library community. Town hall participants shared the following sentiments:

- "It is quite unequal to have large areas in the state without library service;"
- "...Mobile services and access points beyond digital service are important, too;"
- "Looking at [Data and Digital Collections Consultant] Ross [Fuqua]'s map of library service in Oregon, it appears that there is about 20% or so of the state (mostly rural) that has no library service. How can the state support extending access to those areas?"

It should be noted the 20% referenced in the quote above refers to *geographic coverage*. The unserved population in Oregon, according to State Library references, is approximately 6%.

This represents an area where the State Library could build awareness amongst the library community, including making visible the significant barriers to reaching this last 6%.

Communication: Reaching Out Beyond Library Directors

Even as the State Library of Oregon maintains a large communication network, its reach is less than State Library staff and library directors may assume. This was particularly noted by participants in engagement sessions that were not in library management and by library staff of color, and was shared in particular by library staff of color engaged in state-level work, such as the following two points made by members of Oregon REFORMA or OLA EDIAC:

- Very little information about the State Library of Oregon and its programs makes its way to library staff
- Library staff do not know what the LSTA is about, or why it is important, or even why the State Library of Oregon is important.

This disconnection was echoed by staff at large libraries, notably from directors at large libraries sharing the challenge of highlighting the state resources outside of their youth services focused staff, as well as from academic library staff sharing the disconnection they feel from the State Library when at a very large institution (such as the University of Oregon). Community college library directors also see the need for communication to easily be able

to be shared with or make its way to adjunct faculty. As one OLA EDIAC committee member shared, "if we have these questions as leaders... imagine the questions others have!" This is the other side of the coin from the strength of the State Library staff: "you have to know someone to get anything done or who to go to... how can that change?"

It is important to note that the experience of knowing State Library staff and connecting with State Library staff, as reported in these focus groups, varies widely depending on position (director vs non-management staff) and those who do or do not see their race and ethnicity reflected in State Library staff.

Participants in the evaluation process had some examples of how communication could be increased, many of which are elaborated further below:

- A return to more in-person visits as it becomes safer to do so in a post-pandemic environment;
- More participation in regional and library consortium or cooperative meetings that do not feature only directors (such as Washington County Cooperative Library Services youth service or adult service meetings) or outside of public libraries (such as the Oregon Community College Library Association (OCCLA) and the Oregon Council of County Law Libraries (OCCLL)), while maintaining current attendance, such as with Southern Oregon Library Federation (SOLF) and the Libraries of Eastern Oregon (LEO);
- A more easily navigable State Library website.

Direct Connection with Library Support and Development Services Staff

Public (both small and large) and academic library staff mentioned the desire for the State Library to hold (or bring back, if they had been aware) "proactive outreach to directors/new leaders in libraries." Even a "welcome email from the state" was viewed as valuable. A special library director highlighted the "need to reach out to new directors at ALL kinds of libraries."

Library staff would like to see State Library staff both be located outside of Salem and make more visits outside of the Portland Metro and Willamette Valley areas. As members of the SOLF leadership shared, "regional hubs... [with] regional liaisons, [and] staff located in southern, central, and eastern Oregon" are not only visible markers of support, but also a demonstration of true investment in the rural and underserved areas of the state as highlighted in the LSTA Five-Year Plan. A town hall participant stated, "[it] adds legitimacy to have that level of backing from the state."

Leadership in some of the largest public libraries requested similar presence, emphasizing the need for the State Library to have "a vision for the WHOLE state... visiting and understanding the different regions... [the] State Library is an expert who can come," as did

leaders from some of our smallest libraries: “ensure at least one State Library rep at every [regional, library type, or collaborative group] meeting,” or “visit every library over the course of the [five-year] plan.” Increased “personal interactions with librarians in the field, especially in person” was highlighted as a potential measurement of success.

SOLF and large public library leadership want to see the State Library staff “have the expectation that they will participate regionally” in meetings of groups like SOLF and LEO. State Library staff could extend this to other collective groups including OCCLA and OCCLL. Library staff in locations outside of the Portland Metro and Willamette Valley areas mentioned they would like to see the State Library keep a strong commitment to virtual trainings and meetings after the COVID-19 pandemic, as it “is easier to participate statewide.” The investment in 2020 in increased virtual professional development options, including within Niche Academy and InfoPeople, is appreciated and welcomed.

Helping to Communicate Value

While the word “advocacy” was used frequently by focus group participants, as mentioned earlier in this report, the comments themselves point to the need for help in communicating the value of libraries, providing libraries (small and rural public libraries in particular) with the tools they need to better share the library story and raise awareness of library services (“more marketing on ALL libraries’ behalf,” as one community college librarian shared) in their own organizations and communities. Raising awareness and communicating value were strong and consistent currents through all engagement.

Communication about LSTA-funded work

Finally, when focused on LSTA-funded work, members of the library community expressed surprise at how difficult it was to find information on what grants were funded through the competitive grants program, for a variety of reasons:

- The State Library website is difficult to navigate;
- Lack of clarity about what funding supported projects;
- Lack of promotion by the State Library about what has been funded (“unless you are involved in the LSTA council, we don’t get to see what has been awarded”);
- Lack of communication by the State Library on what funded projects achieved, so other libraries could benefit (“how do we build on and not just duplicate projects?”).

For example, the State Library could “feature... [the grants they are] sponsoring” and more “snapshots, direct language, dashboards” that all library staff can access. LSTA Council members remarked on how this information is in the competitive grant applications, and perhaps the State Library should take a leadership role in promoting the “tangible benefits” of grant funded projects.

Reviewing the Granting Process with Equity in the Lead

Library staff have many questions about the granting process, and *perceptions* of the process, what gets funded, and who gets funded, create significant barriers. Across library types, library staff would like to see “separation] between the small grants and the big grants.”

In focus groups representing library staff of color, small and rural libraries, and with participants who were not library directors, the perceived challenges of the competitive grant process were remarkably similar:

- “there are some folks who are really good at writing a grant, and others are not”
- “a lot of the language in the application is not direct”
- “difficult if you only write a few grants” (or if you do not have experience writing grants)
- “hard to know what [LSTA plan] goal to fit into”
- the desire for a “more collaborative funding review process”
- “being able to ask questions/partially fund grants”
- “overwhelming as a small library to think about competing against Salem or Portland — what if there was an amount set aside just for small libraries!”
- “more quick and easy grant applications — and let us know about it!” (the American Rescue Plan Act (ARPA) grant process and the teen-focused mini grants were mentioned several times as examples)
- offer “training on specific grants,” like ALA did for the Libraries Transforming Communities grants for small and rural libraries
- we are “challenged by time/staffing/capacity to write grants.”

Library staff would also like to see greater flexibility in grant funds as related to staffing where possible. “We need to be able to hire staff to do the projects (and write the grants),” shared one community college library director. Directors representing libraries in Oregon’s most diverse cities would like to see “more of the underserved communities applying for and receiving LSTA grants,” specifically with “grants to BIPOC communities” and “small grants for [equity, diversity, and inclusion] activities (like Spanish books).”

Comments from library staff were echoed by the funders interviewed as part of the evaluation process. For example, comments by Nathan Schult, program officer for youth development and education with the Ford Family Foundation, were almost identical to concerns shared by library staff. For example, when asked about trends in granting the Ford Family Foundation is seeing, Schult mentioned their “worry about the eligibility criteria that leaves out small and rural libraries... and [that] larger libraries can hire a grant writer.” There is also concern about the “financial readiness and capacity” for libraries to apply for and administer grants, particularly those that need some level of matching funding or community partners.

Overall, members of the library community want to see more non-competitive funding distributed directly to libraries. Ideas included: increasing Ready to Read funding; funding for positions that are difficult to get locally, such as social workers; supporting different forms of outreach (bookmobiles, kiosks); funds for “taking a chance on a new service model”; and youth-focused workforce development, especially in career technical education (CTE) programs.

The LSTA Council has a significant number of ideas for making the LSTA competitive grants process more equitable, many of which are already in development or are on the path to implementation:

- “More support to encourage first time applicants: explicit framework for moving from idea to application.”
- “continue to move away from evaluating for ‘grant writing skills’ rather than the grant project itself”
- “focus on the journey, what was learned and not necessarily that it was a success”
- “Assess if the reporting can be made simpler.”
- “Assess whether the application can be shorter.”
- “Continuing to revise application to make sure that questions are clear and limit barriers”
- “state library create grant application template for specific projects that increase equity”
- “support for the reporting portion”
- “More communication to historically marginalized communities about grant opportunities.”
- “Provide applying libraries with a grant-writing mentor.”
- “Continuing to revise criteria for assessing grants. Increase weight on serving underserved communities and project based in community need”
- “less competitive grants, more collaborative?”
- “Considering a model where some funds are directly allocated to specific libraries for specific kinds of projects (maybe similar to a ready to read model?)”

Even as significant changes have been made and the grant process simplified, more closely resembling the Ready to Read and ARPA grant processes praised by members of the library community, the perception of the process as time consuming and difficult remains. This can be seen in the comments from both members of the library community and LSTA Council members: “the red tape and bureaucracy for applying for grants is a barrier... but so is the red tape and bureaucracy that comes with reporting out about it. It often makes it not worthwhile to apply for the funds.” An LSTA Council member shared this message to the State Library staff: “continue to work on making processes more accessible, working through red tape/bureaucracy whenever possible.” “Red tape” comments tended to focus on the following items:

- The competitive grant application itself, including the language structure of the application questions and the LSTA plan goals;

- Lack of understanding about the role (or requirement) of matching funds;
- What (and how much) needs to be tracked and reported;
- Lack of understanding about how to fund staff through the grant process to assist with reporting activities.

State Library staff have been working to implement these kinds of changes for some time; from the sentiment of the library community and the congruence with the LSTA Advisory Council, the time is now to prioritize equity in grantmaking as well as in the plan as a whole.

To Keep in Mind for the Next Five-Year Plan

Equity must take a strong and clear lead in the next Five-Year Plan, and the State Library needs to take a broad approach, addressing multiple dimensions of diversity in their work. For example:

- The State Library should look inward, reviewing their own programs and processes through an equity lens. Not only must the State Library be more equitable and anti-racist, it must also ensure its major investments, professional development, and grant opportunities are specifically positioned to prioritize the needs of underserved and systemically marginalized groups.
- As one private funder shared, "Make sure that equity looks at geography, gender, and socioeconomics [as well] — these areas are really getting missed, especially when it comes to rural and tribal areas."
- A strong step in this direction is to work with the LSTA Council to rethink the Competitive Grants process. These grants are seen as invaluable opportunities for investment and innovation but are perceived with significant barriers to application, awarding, and implementation. However possible within Institute of Museum and Library Services (IMLS) guidelines, the State Library should portion out or divide this funding into areas of focus, such as geographic area, size of library, and intended audience.
- When granting is not specifically supporting equity areas of focus, they should have broad and meaningful impact outside the granting organization, and preferably, across a large geographic area, if not the state.
- As expectations for collaborative projects increase, so too should the support in helping libraries put together successful projects and applications for these more complex undertakings.
- The State Library should apply processes and learning from other successful granting programs, such as the Ready to Read funds and the ARPA grant process, to LSTA funding.
- The State Library should consistently and clearly communicate about their equity priorities and how they are being met by grant projects, and take the leadership role in communicating about the impact of grant-funded projects.
- The State Library should develop a plan to fund special and tribal libraries more equitably, soliciting grants from these under-represented and underfunded groups.

- A practical area where immediate help could be offered is how to handle increasing collection related challenges: library staff mentioned needing help re-interpreting or re-envisioning what intellectual freedom looks like through an equity and diversity lens.
- Overall, the State Library should be directing this LSTA funding towards projects that bring about systemic change.

The State Library should be clear and focused with their Five-Year Plan, investing specifically in areas or services with the most need but in a way that benefits the state as a whole. For example, rather than the State Library having an overall focus on workforce development, it could instead focus on workforce development for teens and young adults, an area where private funders are seeing significant interest and expenditure. While focusing on this specific area — youth workforce development— the State Library would fund opportunities and projects that are implemented across the state.

Another example would be to further investigate the results from the Oregon LSTA 2018-22 Evaluation survey and the Oregon Department of Education (ODE)-supported School Media Program Study survey of school staff and leadership, focusing very specifically on the neediest group of school libraries, providing direct funding to audit and update their collections to more authentically and accurately reflect Oregon's diversity. This could be done through a Ready to Read style grant process, with distributions sent directly to qualifying libraries, or direct purchase of core collections, prioritizing the physical collection, for schools across the state.

Another example would be to allocate funding on an annual basis to a specific area of investment. More research would need to be done on what areas of need stand out most strongly to the library community; the State Library could also pick an area of focus. A place to start might be in raising awareness of and assigning more funding to projects or pilot projects that already exist, or which echo trends in the competitive grant process. For example:

- Because several public libraries in small communities asked for help to improve their meeting room technology and offerings as part of the 2018-2022 LSTA competitive grant process, grant applications could be requested and prioritized for libraries needing these updates serving communities under 5,000.
- The State Library could expand funding for the Oregon Digital Newspaper Project (ODNP) and Northwest Digital Heritage, focusing on local digitization projects that make accessible the small-town newspapers and other resources and ephemera that highlight the otherwise untold stories of Oregonians of color.
- The State Library could pick one LSTA goal area per year of the plan to focus on,

prioritizing grants that best support the goal or allow for broad impact in the goal area.

While this may mean a majority of the LSTA funds are essentially pre-allocated, the impact is much more significant and addresses aspects of socio-economic equity.

The State Library is beloved by library staff who understand its offerings and have connected with its staff. There is an incredible opportunity for the State Library to move beyond this most connected group and reach out to staff providing direct public service.

Building on this, and echoing the sentiment listed in the strengths section, the State Library should consider how to best position their staff as being part of statewide work and being perceived as present and visible outside of Salem and the Portland Metro. The Library Support and Development Services staff are well-respected, and members of the library community engaged in statewide work, such as through OLA and the LSTA Council, as well as at the director level, feel connected to those staff. This is especially true for staff in that division who have experience in libraries, particularly in district libraries and rural libraries.

Broader Plan Opportunities in the IMLS Grants to States Focal Areas and Intents

Throughout the evaluation engagement, members of the Oregon Library community highlighted needs, ideas for investment, and potential projects that closely align with several of the Grants to States Focal Areas and Intents. Unlike the strengths and opportunities mentioned previously, these areas may not have had as universal agreement, or the feedback was better suited for matching with the Focal Areas and Intents.

Information Access

Digital Equity.

Members of the library community offered up a significant number of suggestions related to digital equity. Suggestions fell into two areas:

- a desire to see the State Library be an active part in addressing statewide issues related to broadband access, “thinking the level above — think community, not library”; and,
- support for helping library users improve their technology skills.

Members of the library community are looking for a unified response in addressing broadband availability and access, and see this as an area where the State Library can play a leadership role, particularly in ensuring libraries are “at the table” for impactful broadband and digital equity conversations and projects.

Coronavirus Aid, Relief, and Economic Security (CARES) Act and ARPA projects across governmental jurisdictions, notably schools, have improved access to hardware, but public libraries in particular shared their challenges in helping patrons use the technology confidently and successfully. “Our communities are not all the same — there are different divides,” shared one member of SOLF leadership, “...age is a factor. Not [every patron] has the same comfort or practice or opportunity... projects [or resource] language comes with a west side/Portland perspective.” An example of work currently being supported in this area are the ARPA-funded digital navigator projects underway at the Multnomah County Library (one of the largest libraries in the state) and Fossil Public Library (one of the smallest).

Supporting Physical Collections in Schools.

A critical and specific activity that would support the equity work expected of the State Library would be an increased focus on school library collections. For a separate recent project, Constructive Disruption partnered with the State Library and ODE to analyze the results of a statewide survey focused on school library Media Program Standards, and results from [the final report](#), particularly combined with the survey results from the LSTA

Evaluation, paint a clear need for school collections to increase access to up-to-date, equitable, and inclusive collections. Academic and public library staff recognize their school library colleagues are in critical need, and that our youngest students in particular need access to significantly improved collections. While it may be seen as a traditional response, it would be difficult to overestimate the impact a State Library supported core collection could have on school library information access.

Institutional Capacity: Improve Library Operations

Standards — Paired With Training — For Libraries.

The Minimum Conditions for Public Libraries, when brought up by participants, are not seen as strong enough, and are easily confused with the Public Library Standards developed by OLA (which were also not seen as strong enough). Public library staff are clearly looking for guidance, particularly in communicating a base level of service or service expectation, and would like to see training match these expectations.

Library staff would like to see professional development from the State Library matched with standards, and focus on building professional development, particularly around the “philosophy of libraries.” The “philosophy of libraries has become politicized,” particularly in rural and conservative communities where community members comment (and, occasionally, staff comment) can be “you’re just pushing that EDI stuff,” as one Eastern Oregon library leader shared. Directors at large public libraries highlighted the need for increased trustee training, particularly on roles and responsibilities and intellectual freedom, as well as support for library staff in dealing with politicized election or appointment of new board members and how to gracefully handle “board members with agendas.”

Licensed school librarians similarly would like to see consistent access to baseline continuing education and wonder if the State Library has the “influence to offer a library certification program” — not a formal certification, but a state-specific informal program, similar to the American Library Association’s Library Support Staff Certification (LSSC). As increasingly more school libraries are staffed solely by classified library staff and, as one licensed school librarian said, “given [the] responsibility of the LMS [library media specialist] without training,” libraries are unable to provide the critical information literacy support students need.

Collecting Statistics.

The Public Library statistics are another area where coordination from the State Library is seen as valuable. One SOLF member shared, “the statistics are valuable but have gotten really complicated.” Members of SOLF wondered if there was a way for the State Library to provide a tool for capturing the data throughout the year, to reduce the burden on staff at reporting time, ensure the appropriate statistics are kept, and to support front-line library staff in accurately reporting data. Special libraries asked, “what if the State Library collected

info on other kinds of libraries like they do for publics?" Licensed school librarians would like to have more consistent and, critically, *easy* access to updated data, even as simple as budgetary and staffing data, for comparison. It is very difficult for schools to demonstrate whether they are in compliance with library requirements due to challenges in accessing data and the challenge in easily finding comparative peer libraries and school districts.

Economic and Employment Development

Youth Workforce Development.

As referenced earlier in this report, private funders see increased need for workforce development focused on teens and young adults.

Private funders highlight the need for libraries to "be at the table" for this discussion, working with local groups and schools to facilitate access for underrepresented youth; both mentioned traditional workforce development is mostly focused on adults and more traditional needs (resumes, for example) rather than helping communities navigate the workforce changes coming. This is an excellent example of an area where the State Library could teach libraries how to make effective partnerships with non-library organizations, and potentially provide tools and training to library staff so they would feel confident in their participation and/or come to that "table" as an equal/important partner.

Library staff also see opportunities for state-supported internship programs, especially in support of diversifying library staff (similar to the aims of the Public Library Association's Inclusive Internship Initiative).

Human Services

Including Families in Youth Programming and Outreach.

Private funders see the need to incorporate more support for family participation and engagement in programs for youth, particularly in programs that serve underserved and systemically marginalized groups. There is great opportunity for the State Library to adopt or prioritize a more holistic approach in its programs for youth, building on that strong foundation.

Notes on Reporting for the Future

As the State Library begins to develop its next Five-Year Plan, there is a great opportunity to include the development of measurements of impact and success with the development of plan goals and focus areas. This would allow for more meaningful and continuous evaluation throughout the life of the plan, as well as the ability to dive deeper in the plan's evaluation. When developing the next plan, the State Library should ensure it is considering what data it wants to collect from the beginning, matching the end goal, whether that be statistical or stories of impact, with the data to be collected. These recommendations could then, perhaps, be built into the LSTA competitive grant application and process, which would ensure the State Library gathers data in aggregate while relieving some of the "red tape" mentioned earlier, as, in some cases libraries wouldn't have to come up with their own measurements for their projects.

While the library community did not express that they feel the State Library focuses on one library type more or to the exclusion of others, there is an opportunity for the State Library to more deliberately be able to report out on their engagement to the library community with different library types. This is true for different geographic areas of the state as well. This data collection for impact by library type and/or region will be critical in supporting the distribution of resources for equity and inclusion.

In addition, small changes in data entry with the annual State Program Report (SPR) submitted to the IMLS would make painting a picture of impact clearer. For example:

- When the grants are entered in SPR, be sure the State Library staff are consistently linking them to the associated goal and the intent, especially if there are multiple staff members entering projects, or staff changes shift this responsibility from one person to another. This may be particularly important as the State Library turns towards more funding of EDIA related projects.
- Strive for more consistency in where projects are classified or categorized.
- Build expectations and definitions of achievement into the plan itself, potentially including:
 - Pre- and post-tests for staff development
 - Articulating measurable objectives for each year's project phase, tying the objectives and phases to plan goals

With the plan, plan data, and evaluation, the State Library has three tools to demonstrate its focus and impact that are currently underutilized. With the next Five-Year Plan, consider developing it to use it as a tool to communicate and demonstrate the State Library's value, making clear where Oregon libraries need to step in. Modeling equity and inclusion as well as measuring for impact and outcome in the Five-Year Plan allows the plan to be a model for local communities to frame their own work.

In Conclusion

Throughout the engagement for the State Library of Oregon's 2018-2022 LSTA Five-Year Plan evaluation, feedback on the strengths, opportunities, and potential future paths and projects from the Oregon library community was remarkably consistent.

Over the next five years, the Oregon library community highlighted five opportunities that exist for the State Library of Oregon:

- **Continue and deepen** the State Library's **high level of engagement and connection** with the library community;
- Continuing to connect libraries across geography, service population, library size, and library type, **investing in projects with impact across groups**;
- Actionable investment in **equity, diversity, inclusion, and antiracism** initiatives;
- Supporting libraries with the tools they need at the local/organizational level to **increase general awareness and visibility of libraries and library services**
- **Overcoming perceptions** around processes, particularly the competitive grant process, to increase participation.

The staff of the State Library are incredibly well-respected and valued for their expertise, consistency, and reliability. Members of the Oregon library community spoke time and time again about the confidence they have in reaching out to the State Library and the quality of the help, advice, or resources they will receive. At the same time, these connections tend to be strongest with library directors or upper management, with the exception of school library staff; there is great opportunity for the State Library to find ways to deepen their impact with front line or direct service library staff.

The State Library is viewed as a key leader in advocating for and supporting projects with impact across regions of the state, across community or organization size, and across library types. Library staff in engagement described the importance of the "library ecosystem," in projects that encourage collaboration, breaking out of library type silos, and learning from each other.

The greatest expressed need for the next Five-Year Plan was in the area of equity, diversity, inclusion, and antiracism (EDIA) work. Members of the library community need and expect the State Library to take a leadership role in these areas, reviewing their own policies, programs, and procedures, including the granting process; supporting projects and initiatives in these areas; providing resources, including training, and, notably a consultant, for libraries to access; and focusing on libraries with the greatest need or in communities with the greatest need.

Comments around the grantmaking process bring together these last two opportunities: increasing communication with and between libraries and EDIA. For example, at every step of the grantmaking process, there are perceptions that keep libraries from participating; these perceptions even persist, in many cases, within the LSTA Advisory Council, charged with distributing the competitive grant funds. The State Library should both address these perceptions and make any necessary shifts to best support EDIA initiatives.

Finally, throughout, members of the Oregon library community would like to see the State Library help them more effectively tell their story. Ideas might include toolkits that can be repurposed locally; focused grantmaking, and tools to promote grant projects; or investment in programs that have statewide impact.



About Constructive Disruption

Constructive Disruption (<http://www.constructivedisruption.info>) is a woman-owned consultancy based in Oregon focusing on strategy work for local government and libraries. Our planning processes are built with a collaborative, future-focused mindset at the heart; our strengths-based, human-centered approach sets our consultancy work apart.

Our consultancy functions as a cooperative, bringing together expertise tailored to our projects. Our team members are located across the United States; we pool our knowledge and experience in the belief that collaborators with different viewpoints create superior end products. For the State Library of Oregon LSTA 2018–2022 Evaluation, our team included:

- **Stephanie Chase** (she/her). Stephanie has more than 20 years of experience in public libraries on both the east and west coasts, having served as a library director or in executive leadership in small and rural public libraries as well as at Multnomah County (OR) Library, The Seattle Public Library, and the Hillsboro (OR) Public Library. Stephanie is the Founding Principal of Constructive Disruption and currently the Executive Director of the Libraries of Eastern Oregon, a 15-county resource sharing cooperative, and serves on the Public Library Association's Board of Directors.
- **Judah Hamer** (he/his). Judah Hamer has deep experience in public and school libraries, with a career spanning over three decades. His areas of expertise are organizational development, knowledge management, and interactional analysis. In addition to more than 30 years in library service, Judah has taught extensively at the School of Communication & Information, Rutgers University (NJ) and is currently Vice President, Operations and Human Resources at Bandujo Advertising + Design, New York City.

We believe in working together to break down barriers to progress.

STATE LIBRARY OF OREGON

LIBRARY SERVICES AND TECHNOLOGY ACT

2018-2022 FIVE-YEAR PLAN EVALUATION REPORT



Prepared in March 2022 by Constructive Disruption

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