

Project Plan

A Needs Assessment Study of Texas Academic, Public, and School Libraries

Submitted by

**The Texas Center for Digital Knowledge
University of North Texas**

Prepared by the

**The Texas Center for Digital Knowledge
Needs Assessment Study Team**

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Introduction

This project plan outlines each of the study activities and describes how the Contractor Team will carry out this project. The contractor for the study is the Texas Center for Digital Knowledge, University of North Texas. The client is the Telecommunication Infrastructure Fund Board (TIFB). The study team working on this project includes:

- Principal Investigator and Project Manager, William E. Moen
- Co-Principal Investigator, Carol Simpson
- Principal Researcher, Florence Mason
- Principal Researcher, Louella Wetherbee
- Graduate Student Research Assistants.

William Moen, Carol Simpson, Florence Mason, and Louella Wetherbee are referred to as the “Team” in the following sections. Principal Researchers Mason and Wetherbee are subcontractors on the project.

The project plan sets out the study activities associated with developing survey questions, survey instruments, and the methods to be used to design and to gather appropriate data to answer the study questions. Specifically, the project plan addresses the following study activities:

1. Startup Activities
2. Document and Data Scan
3. Online Questionnaires
4. Library user Needs Questionnaire
5. TexShare User Access Evaluation
6. Checkpoint Meeting
7. In-depth Focus Inquiry
8. Best Practices
9. Study Feedback Session
10. Preliminary Findings Review
11. Evaluation Report
12. Project Completion.

Each of the project activities is described below, and task and responsibilities are listed under each. The deliverables associated with each activity will be produced as written documents. The project plan gives the completion data for each deliverable and the responsible member(s) of the Team to be involved.

The overall study objectives were developed in collaboration with the TIFB Library Working Group. The framing questions developed as a result of the meeting with TIFB Library Working Group are listed below under start up activities.

The study objects are:

- To identify and document the current technological capability and readiness of each type of library to meet user group needs.
- To identify and document the major categories of user technical and information needs in areas related to TIFB funded programs.
- To determine the state's role in ensuring that Texas libraries can complete and maintain an adequate technological capacity to deliver information services in the future.
- To determine the state's role in ensuring that librarians and library staff at all levels have appropriate technology skills.
- To examine how state-funded, centralized information resources be integrated into and complement locally provided resources.
- To identify the appropriate organizations to develop and deliver various levels of support to ensure long-term maximum integration and use of state-provided information resources and technology.
- To identify the probable costs and type of TIFB grants required to meet existing and future library and user needs for the period 2003-2007.
- To identify appropriate outcome and other evaluation measures to assess the impact of the TIFB grant programs.

1. Start Up Activities

During the first phase of work, the Team will develop a project plan to guide all study activities. During this period, the general study areas of inquiries will be defined, resulting in a set of “framing questions” for the study. The framing questions will be reviewed by the Team and then reviewed by the TIFB Library Working Group.

The draft of the project plan will be reviewed by the Team and then forwarded to the TIFB Library Working Group for review. Other informants for the this activity may include TIFB staff, Texas State Library and Archives staff and other opinion leaders in the Texas library community.

The Principal Researchers will establish a project website and initiate methods for tracking documents and project activities.

Tasks & Responsibility

- Develop framing questions.
- Discuss framing questions with Library Working Group representatives.
- Contact TIFB staff and TSLAC staff regarding study start up and make requests for documents and information.
- Develop project plan with tasks, timelines and responsibilities.

Deliverables	Completion Date	Responsibility (in order of responsibility)
1.1. Define framing questions	March 4, 2002	Mason, Wetherbee, Moen
1.2. Mount project website	March 4, 2002	Moen
1.3. Prepare Project Plan	March 11, 2002	Mason, Wetherbee, Moen

2. Document and Data Scan

The Principal Researchers will confer with the Team and the TIFB Library Working Group to prepare a working list of contacts in the State who can assist the Team in identifying relevant documents and data sources that will be reviewed.

The Principal Researchers will share responsibility for identifying, assembling and assessing data relevant to the study activities. A spreadsheet will be produced containing the working data/source list to which all team members will have access and to which they can contribute. The contact list and the data/source list will be updated throughout the course of the project and will be available on the Internet at the project website <http://www.unt.edu/needz>

The final report will contain a summary of the documents and sources reviewed and/or contacted in the course of the study. This material will be prepared and included as a technical Appendix.

Tasks & Responsibility

- Identify contacts for Mason, Wetherbee, Simpson
- Travel to Austin to meet with TIFB staff, staff from the Texas State Library and Archives and also met with the Chairman and an additional member of the TIFB Library Working Group.
- Conduct online literature searches to identify additional relevant data sources and documents, in-state and elsewhere.

Deliverables	Completion Date	Responsibility (in order of responsibility)
2.1. Contact list	March 15, 2002	Mason, Wetherbee, Moen, Simpson
2.2. Data/source list (see below)	On Going	Mason, Wetherbee, Moen, Simpson
2.2. Information for technical appendix	March 15, 2002	Mason, Wetherbee, Simpson
2.3. Online literature search	March 15, 2002	Wetherbee, Mason

Preliminary Sources of Data

A preliminary partial list of documents/data sources that are likely to be useful background information for the study is given below. The list will be expanded as other sources are identified.

- KPMB TIFB Evaluations for grant rounds
- TIFB Request for Proposals
- Tang Training Grant Evaluations (NETLS)
- National Center for Educational Statistics
- Academic Texas Higher Education Coordinating Board Statistics
- Independent Colleges and Universities of Texas data
- TexShare.edu information
- TSLAC Library service population data
- ZLOT Survey (Texas Center for Digital Knowledge, UNT)
- NETLS and NTRLS Technology profiles
- Houston Public Library Training surveys
- AMIGOS TIFB LB 4 and LB 6 Evaluations for TIF TECH training
- AMIGOS – other training evaluations
- Texas School Libraries: Standards, Resources, Services and Students' performance
- TIFB website
- Texas Center Educational Technology (TCET) University of North Texas

3. Online Questionnaires

The principal method for gathering information from the key library user communities will be an online questionnaire. There will be four versions of the questionnaire to be distributed to public, higher education, community college and school libraries. The sections of the questionnaire will include:

- Section 1: Identification information on respondents
- Section 2: Technology capacity
- Section 3: State of Utilization
- Section 4: Readiness and Barriers – Public
- Section 5: Readiness and Barriers – Staff
- Section 5: Sustainability
- Section 6: Partnerships

The four questionnaires will be developed in draft, reviewed by the Team and the TIFB Library Working Group and then pre-tested with a sample from each of the library user groups before wider distribution.

The question bank will be drawn from a variety of sources adapted to the specific needs for this study. These questionnaires will be developed based upon framing questions, the closely related

survey being done as part of the ZLOT Project, input from the TIFB Library Working Group and the relevant experience of the survey team to achieve the expected outcomes.

The sample population for the questionnaires will be based on the population of TIFB libraries who have previously received TIFB funds. Furthermore, the questionnaire will be distributed to the libraries selected and sampled by KPMG/TIFB evaluation processes. The TIFB office is able to supply lists of grantees and the Principal Researchers will obtain electronic lists of the TIFB libraries and institutions that participated in each of the TIFB grant rounds and subsequent evaluation cycles.

The questionnaires will be distributed to:

- Public Libraries
- Schools
- Community Colleges
- Public and Private Higher Education Institutions.

Once the instrument has been pre-tested it will be provided to the team programmer who will prepare it for online distribution. The Principal Researchers will oversee the programming work related to the preparation, testing and administration activities.

Once the data has been collected, the Principal Researchers will analyze the data and formulate additional data processes.

The data will be compiled and a summary report will be produced as a written document.

Tasks & Responsibility

- Analyze the KPMB evaluation surveys and other surveys for potential questions and to avoid duplication on questions
- Develop online question bank
- Define sample populations
- Review questionnaires with TIFB Library Working group
- Pre-test questionnaires
- Perform data collection and analysis
- Determine additional data treatment, if necessary
- Prepare draft summary of collected data

Deliverables	Completion Date	Responsibility (in order of responsibility)
3.1. Four online questionnaires	March 22, 2002	Mason, Wetherbee, Moen
3.2. Sample population lists	March 22, 2002	Mason, Wetherbee
3.3. Pre-test questionnaire	March 29, 2002	Mason
3.4. Perform the data collection and analysis	April 26, 2002	Mason, Wetherbee, research assistants
3.5. Summary of questionnaire data	May 15, 2002	Mason, Wetherbee, Moen

4. Library User Needs Questionnaire

The Principal Researchers will develop an additional questionnaire that focuses on user needs for information. The questionnaire will be distributed through the ten Texas library systems. This focus will be on gathering data about public library user behavior, categories of information sought, and use of electronic resources. The survey population will be system member (public) libraries that will be asked to complete an online or faxed questionnaire regarding user behaviors and needs.

The questionnaire will first be prepared in draft form, reviewed by the Team and then reviewed by the TIFB Library Working Group. The questionnaire will be pre-tested first with NETLS system members. After the pre-test, the questionnaire will be revised as needed and released to the other nine systems for distribution. Results will be collected either online or on paper, and forwarded to the Principal Researchers for analysis. The Principal Researchers hope for a 20% completion rate for the survey from all system members. To achieve this return, the Principal Researchers may have to schedule follow up contacts with system members via fax or online to stimulate additional survey responses.

Tasks & Responsibility

- Prepare questions for draft user questionnaire
- Pretest questionnaire with NETLS members
- Revise the questionnaire, if necessary
- Forward the questionnaire to the system
- Collect and analyze the data
- Summarize the collected data

Deliverables	Completion Date	Responsibility (in order of responsibility)
4.1. Draft questionnaire	March 30, 2002	Mason, Wetherbee, Moen, Simpson
4.2. Final questionnaire	April 1, 2002	Mason, Wetherbee, Moen
4.3. Data collection and analysis	April 20, 2002	Mason, research assistants
4.4. Summary of the data	April 27, 2002	Mason, Wetherbee, Moen, Simpson

5. TexShare User Access Evaluation

For the purpose of gaining insight about recent user experiences with electronic access, a telephone survey will be conducted with approximately 40 members of the public who were given remote access codes in December 2001 to access TexShare electronic databases. The Principal Researchers will develop a telephone questionnaire. The focus of the questionnaire will be to access the nature of use of electronic resources, to assess their experience with use, and to identify barriers or other issues associated with use.

Tasks & Responsibility

- Identify the list of the public who obtained remote access codes for TexShare databases
- Prepare draft of the telephone survey script
- Pretest the telephone survey script
- Analyze the data
- Prepare a summary report of the data findings, conclusions

Deliverables	Completion Date	Responsibility (in order of responsibility)
5.1. Draft telephone survey script	March 10, 2002	Mason, Wetherbee, Moen
5.2. Final telephone script	March 18, 2002	Mason, Wetherbee
5.3. Data collection and analysis	March 25, 2002	Mason, research assistants
5.4. Summary of the data	April 7, 2002	Mason, Wetherbee

6. Checkpoint Meeting

The Team will meet with the TIFB Library Working Group during a meeting to be held April 9, 2002 in Dallas. The purpose of the checkpoint meeting will be jointly review project progress, to discuss any issues that may have developed in the study to this point, and to review preliminary data.

At the meeting the Team will discuss project progress and share preliminary findings and conclusions from the data gathering activities. Preliminary data will be available from the user needs survey, the telephone data, and some preliminary results may be available from the four online questionnaires.

Tasks & Responsibility

- Prepare interim project report
- Prepare preliminary results report
- Distribute reports to Library Working Group

Deliverables	Completion Date	Responsibility (in order of responsibility)
6.1. Interim project report	April 7, 2002	Moen, Simpson, Mason, Wetherbee
6.2. Preliminary results report	April 7, 2002	Mason, Wetherbee, Moen, Simpson

7. In-depth “Focus” Inquiry

In order to explore and understand the needs of library and library users in greater detail the Principal Researchers will contact and interview by telephone representatives drawn from the list of all previous TIFB grantees. The interviews will be conducted as call-in telephone conferences during which users can dial in and participate. For each library type, the Principal Researchers will set up and conduct up to three dial in teleconference calls to adequately accommodate each of the grantee populations. Both Principal Researchers will attend these calls with secretarial assistance to ensure complete note taking.

In addition, the Principal Researchers will identify and interview by telephone a number of opinion leaders in order to supplement and deepen their understanding of library user needs. The Principal Researchers will prepare a contact list with input from the Team and the TIFB Library Working Group.

Tasks & Responsibility

- Develop sample population for dial in telephone conferences
- Develop question script for dial in telephone conferences
- Schedule dial in telephone conferences
- Complete conferences
- Create individual interviews lists
- Complete individual interviews
- Produce summary of interview input

Deliverables	Completion Date	Responsibility (in order of responsibility)
7.1. Invitation list for dial in conference participants	April 15, 2002	Wetherbee, Mason
7.2. Conduct dial in conference calls	May 15, 2002	Wetherbee, Mason, Moen
7.3. Individual interview lists	April 15, 2002	Wetherbee, Mason
7.4. Summary of dial in and interview gathering	May 24, 2002	Wetherbee, Mason, Moen

8. Best Practices

Early indications suggest that training is an important and ongoing need for librarians and patrons, and to develop recommendations to the Library Working Group, the Team will research what practices have already been implemented by other libraries and other agencies elsewhere.

As part of this activity, the Principal Researchers will assess how Texas libraries can best take advantage of existing “best practices” in training and support from within the state or elsewhere.

Information on best practices will be gathered through an examination of web sites. The selection of the web sites/libraries to assess will be assembled based on the Team’s knowledge, the knowledge of individual informants contacted in course of the study, and published citations to best practices.

The Principal Researchers will follow up through telephone calls to obtain additional information on practices as necessary.

Tasks & Responsibility

- Identification of best practices sites and resources
- Web site research
- Follow up with telephone to obtain additional information
- Compilation of best practices information

Deliverables	Completion Date	Responsibility (in order of responsibility)
8.1. Web site and practices sources	April 19, 2002	Wetherbee, Mason
8.2. Follow up telephone calls	May 1, 2002	Wetherbee, Mason
8.3. Summary of best practices	May 15, 2002	Wetherbee, Mason

9. Study Feedback Session

In order to obtain feedback from a cross section of Texas library practitioners about the study results and preliminary findings, the Team will plan a program during the Texas Library Association Annual Conference. The purpose of the session, entitled, “The TIFB Needs and Priorities Forum” will be to discuss the study process and objectives, present the study preliminary results and findings, and seek broad feedback. The Team will plan, organize, publicize, and facilitate this session.

Tasks & Responsibility

- Prepare schedule the Forum
- Conduct the Forum
- Summarize Forum findings

Deliverables	Completion Date	Responsibility (in order of responsibility)
9.1. Overview of the Forum	April 25, 2002	Wetherbee, Mason
9.2. Prepare summary of Forum	May 15, 2002	Wetherbee, Mason

10. Preliminary Findings Review

The Principal Researchers will prepare a preliminary findings and recommendations report. The report will contain the results from the study activities and initial set of findings and recommendations. The preliminary findings and recommendations report will include summaries of the document and data scan, questionnaire results, and supplementary questionnaires, and in-depth focus inquiry.

The Principal Researchers will review the preliminary findings report with the Team. After this review it will be presented to the TIFB Library Working Group at a preliminary findings review meeting scheduled for late May 2002.

Tasks & Responsibility

- Prepare of report draft
- Submit/review of the report draft
- Team review of the draft
- TIFB Library Working Group review of draft report

Deliverables	Completion Date	Responsibility (in order of responsibility)
10.1. Draft of Preliminary Report	May 17, 2002	Mason, Wetherbee, Moen, Simpson
10.2. Preliminary Report for Distribution	May 24, 2002	Moen, Mason, Wetherbee, Simpson

11. Outcomes Evaluation White Paper

One of the study objectives is to prepare a background paper on evaluation methods and measures with specific focus on outcomes evaluation. The document will identify potential outcomes measures relevant to TIFB and libraries receiving TIFB grants, and will suggest strategies and activities for grant recipients to develop and implement outcomes-based evaluation.

The deliverable for this activity is a report that discusses evaluation methods and measures with emphasis on outcomes evaluation, and will include strategies and activities to develop and implement outcomes-based evaluation. The definition of the evaluation components will follow the preliminary findings review.

Tasks & Responsibility

- Review outcomes evaluation literature
- Prepare draft white paper
- Review of white paper
- Finalize white paper

Deliverables	Completion Date	Responsibility (in order of responsibility)
11.1. Outcomes Evaluation Report	June 30, 2002	Mason, Wetherbee

12. Project Completion

After the meeting with the TIFB Library Working Group to review and get feedback on the draft Preliminary Findings and Recommendations Report, the Principal Researchers will make the necessary changes and revisions to the draft report and forward these to the Team for review. The Team and the TIFB Library Working Group will reach agreement on materials to be included in the report's Technical Appendix prior to finalization.

The Principal Researchers may schedule a final project meeting with the Library Working Group to review both the final report and the evaluation outcomes report. After this session, the Principal Researchers will finalize the report.

Tasks & Responsibility

- Prepare final report document
- Plan and attend project review meeting
- Review final report and evaluation outcomes report
- Agree on content of technical appendices
- Finalize report for distribution

Deliverables	Completion Date	Responsibility (in order of responsibility)
12.1. Final Report	June 30, 2002	Mason, Wetherbee, Moen, Simpson
12.2. Final Project Meeting	T.B.D.	Moen, Mason, Wetherbee, Simpson