

Long-Range Plan for 2010-2011 Application Form

Directions for the Long-Range Plan for 2010-2011 Application Form

- ❖ Step 1 (REQUIRED) Complete the narrative overview – not to exceed 5 pages
- ❖ Step 2 (REQUIRED) Complete the project plan for each **required** project:
 - Step 2.1- Administration Project Plan
 - A. Complete the project narrative
 - B. Complete the project budget summary for both years

*No Legislative Budget Board (LBB) or Project Performance measures are required for this project
 - Step 2.2 – Consulting Project Plan
 - A. Complete the project narrative
 - B. Complete the project budget summary for both years
 - C. Complete the Project Performance form
 - D. Complete the LBB Measure Projections form
 - E. Complete the Outcomes Based Evaluation form (if applicable)
 - Step 2.3 - Continuing Education Project Plan
 - A. Complete the project narrative
 - B. Complete the project budget summary for both years
 - C. Complete the Project Performance form
 - D. Complete the LBB Measure Projections form
 - E. Complete the Outcomes Based Evaluation form (required)
- ❖ Step 3 (OPTIONAL) Complete a project plan for each **proposed** project
 - A. Complete the project narrative
 - B. Complete the project budget summary for both years
 - C. Complete the Project Performance form
 - D. Complete the LBB Measure Projections form
 - E. Complete the Outcomes Based Evaluation form (if applicable)

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Narrative overview of the long-range plan for the system (Required)

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Project plan narrative - Project Name:

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Project Performance Form

For each project (except Administration), complete the following Project Performance form.

Project Name:	
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Member Library Estimates	FY2010	FY2011
1. Total member libraries in System:		
2. Total library staff in libraries:		
3. Estimated Total Number of Sessions / Visits / Other Project Activity:		
4. Estimated Total Number of library staff Receiving Project Services:		
5. Estimated Unduplicated Number of Libraries Receiving Project Services:		
6. Estimated Unduplicated Number of Library Staff Receiving Project Services:		

Non-member Library Estimates	FY2010	FY2011
1. Total non-member public libraries in System:		
2. Total library staff in this type of library:		
3. Estimated Total Number of Sessions / Visits / Other Project Activity:		
4. Estimated Total Number of library staff Receiving Project Services:		
5. Estimated Unduplicated Number of Libraries Receiving Project Services:		
6. Estimated Unduplicated Number of Library Staff Receiving Project Services:		

Other Types of Libraries Estimates	FY2010	FY2011
1. Total other types of libraries in System:		
2. Total library staff in libraries:		
3. Estimated Total Number of Sessions / Visits / Other Project Activity:		
4. Estimated Total Number of library staff Receiving Project Services:		
5. Estimated Unduplicated Number of Libraries Receiving Project Services:		
6. Estimated Unduplicated Number of Library Staff Receiving Project Services:		

- Mark as "N/A" (Not Applicable) any sections that do not apply for each project.
- For measure 1 and 2, please enter totals from the most recent annual report for each category of library.
- For measure 3, please enter totals based upon the total number of sessions, visits or other applicable activity unit planned in the fiscal year. For example, if this were for continuing education, the total would reflect the total number of workshops (face-to-face or online) planned.
- For measure 4, please enter total based upon the total number of library staff or other persons that will receive services from this project. For example, if this were for continuing education, the total would reflect the total number of attendees to all training sessions planned for the upcoming years.
- For measure 5, please enter total based upon the unduplicated number of library organizations that will receive services from this project. For example, if this were for continuing education, the total would reflect the number of libraries that sent a staff person to a CE session. It only counts each organization once to arrive at a unique count of libraries served as a percentage of overall libraries.
- For measure 6, please enter total based upon the unduplicated number of library staff that will receive services from this project. For example, if this were for continuing education, the total would reflect the number of staff attending a CE session regardless of the number of sessions attended. It only counts each staff member once to arrive at a unique count of staff served as a percentage of overall staff.

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LBB Measure Projections Form

Project Name:

(To update total in table, select the "Target Total" figure, right-click, and select "Update Field")

Number of Books and Other Library Materials Provided to Local Libraries	
Non-Electronic Sub-Total:	0
Electronic Sub-Total:	0
Target Total:	0
Please describe the method of measurement:	
Please provide justification for the measurement:	
Number of Persons Provided Local Library Project-sponsored Services	
Non-Electronic Sub-Total:	0
Electronic Sub-Total:	0
Target Total:	0
Please describe the method of measurement:	
Please provide justification for the measurement:	
Number of Librarians Trained or Assisted in Local Libraries	
Non-Electronic Sub-Total:	0
Electronic Sub-Total:	0
Target Total:	0
Please describe the method of measurement:	
Please provide justification for the measurement:	

If you have questions about LBB definitions or what should be included in the projections, please contact Chris Jowaisas.

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Outcome Based Evaluation Form

(NOTE: Required for Continuing Education project)

Project Name:	
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Outcome:	(Immediate)
Indicators:	
Target:	

Outcome:	(Immediate)
Indicators:	
Target:	

Outcome:	(Immediate)
Indicators:	
Target:	

Outcome:	(Intermediate)
Indicators:	
Target:	

Outcome:	(Intermediate)
Indicators:	
Target:	

Outcome:	(Intermediate)
Indicators:	
Target:	

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Legislative Budget Board Performance Measures

Explanations of LBB Performance Targets

Number of materials made available or circulated to libraries by the Texas Library System:

An auditable record must document counts.

A book is defined as a "physical unit of any printed, typewritten, handwritten, mimeographed, or processed work contained in one binding, or portfolio, hardbound or paperbound, which has been cataloged, classified, and/or made ready for use." Under this definition, *Books in Print* would be counted as separate volumes or pieces of library material.

Count the estimated number of volumes of periodicals purchased. Report the estimated number at the time the subscription will be purchased; do not attempt to track upon receipt by member libraries. A one-year subscription = 1, a three-year subscription = 3. System newsletters may be counted in this line.

Report the estimated number of videocassettes, microforms, DVD's, films, audiocassettes, filmstrips, microcomputer software for public use, etc. Exclude equipment, catalog card sets, and supply items. Count number of physical units. Physical units are volumes, items, or pieces.

A workshop packet should be counted as one material provided. Do not count each part of the packet as a separate material. The packet should be counted as a whole unit. If a packet is provided at a workshop and a book is provided in addition to the packet, then each may be counted. For example the book may be counted as one material provided and the packet as one material provided resulting in 2 materials provided per attendee.

Newsletters are to be unique counts based on the number of persons subscribing to the newsletter, regardless of the number of different media in which they receive the newsletter. If a person receives the newsletter in hardcopy as well as electronically, the count would be one.

Blast e-mails and faxes should not be counted as materials provided unless the e-mail or fax is of substantive content and length and was created by the System office with reasonable level of effort, or higher level of effort. For example, do not count an e-mail from an American Libraries Association listserv that the System office simply forwards on to its members as a material provided. However, do count e-mail or faxes on a topic that the System office compiled based on a need for the information that took a substantive amount of effort to create. The material provided should be equivalent to an item that would be added to a professional collection. Do not count System business such as workshop flyers, System calendars, administrative or publicity items.

Report the number of times electronic resources of substantive information, funded through the Texas Library System, (files, documents, menus, graphics or services) are accessed.

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Report only substantive content accessed through the electronic service. For example, if the web page is something that might be provided to the patron as a handout material or as a resource, then the page would be considered a “view” and would be counted in this measure.

Number of Library Patrons who use services provided through the Texas Library System:

*** KEY Performance Measure***

An auditable record must document counts.

Report the estimated number of persons attending video, DVD, and film showings. Showings and attendance count should be reported for all System-owned videos and films, for all leased videos and films obtained with System funds, and for all showings made possible by grant-funded public performance licensing agreements. The count of film showings should include both in-house showings and out-of-library showings.

If the System sponsors or prepares cultural exhibits, puppet shows, adult projects, and displays for the public, etc., the System should report the estimated number of persons attending these special events. Do not count regional business meetings. Sign in sheets or some auditable record must document attendance counts.

Report the estimated number of System-owned materials circulated to the public. Such circulation statistics would include the books-by-mail, large-print, Spanish language materials, books on cassette, videocassettes, extension loan collections, etc. This includes out-of-library circulations by local libraries. Explain how “materials circulated” is calculated. This should be a non-unique count. If your System has a reciprocal borrowing component, report the estimated use of materials circulated to the public.

Include a count of persons who have reference questions answered by the System office through referral from the local library and answered by the reference back-up project. Do not include any questions that involve the TexNet Interlibrary Loan Center.

Report the non-unique counts of reference questions answered. The non-unique count should be based on number of topics. For example, if one person asked several questions on the same topic, it would be counted as one reference question. If one person asked two questions, each on a separate topic, it would be counted as two reference questions. Use judgment in determining when reference assistance has concluded. If the System is paying for a virtual reference service, the reference questions answered through this service should be reported.

Report the estimated number of interlibrary loans that occur among the member libraries as part of a specific System project. Do not report any interlibrary loans that involve the TexNet Interlibrary Loan Center.

For Literacy or ESL projects report the number of persons attending each tutoring or class instructional session. Identify only those persons in literacy sessions at the specific locations (e.g., branch libraries) targeted by the System's literacy project. *Note:* This is not the number of individuals enrolled for the project, but the attendance at each session.

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Report the number of discrete uses of any shared electronic resource, service or network by a library patron or library staff acting on behalf of a patron, which is funded through the Texas Library System. Examples include Internet sessions and use of automated union catalogs through software or by estimating. Estimate also in this line the number of sessions or visits to a project-funded electronic information server supplied through the Texas Library System.

Number of librarians trained or assisted by the Texas Library System:

An auditable record must document counts.

If a single workshop for librarians, trustees, Friends members, or public officials is held in multiple locations, then report each location as a separate workshop. A workshop on puppetry held in three locations is counted as three workshops. *Note:* The System advisory council orientation sessions and conferences are to be considered as instructional workshops. When a System supports an instructional workshop in collaboration with others, that System may report a prorated share of persons and student hours.

Count all the persons attending the instructional workshops in all the locations where the workshop will be held. Do not include in this category the number of System staff who attend workshops. It is logical that each System participating in a jointly planned and funded workshop will get credit for the participants from the member libraries in its System. If persons from one System attend another System's workshop that is not cosponsored, the sponsoring System should report these persons, even though they were from another System.

Instructional training of volunteer literacy tutors in a workshop setting should be treated as a System workshop and reported as such on the standardized reporting form, if the System is paying for the workshop or had a role in arranging for the workshop (for example, arranging for meeting space, helping to publicize the workshop, etc.). If the System does not have a direct role in arranging for the tutor training (if the local library or some other group does this), the session should not be counted as a System workshop. The cost of a tutor training session should be charged to the Literacy Project cost center, not the Continuing Education Project cost center.

Report the number of librarians trained through instructional workshops. A workshop must have a defined, developed, curriculum and materials of substantive content and length. The number of participants is not a factor in determining if it is a workshop. Workshops include but are not limited to:

1. Instructor-led tutorials, workshops, or training sessions provided by various means such as in-person, online, or videoconference;
2. Self-paced online tutorials, workshops, or training sessions;
3. Recorded versions of all of the above provided by videotape, CD-ROM, streaming media, or other recorded medium.

A workshop attendee is a non-unique count of a person who is registered and attends the workshop event. If the workshop event is multi-day or multi-topic each attendee is only counted once: one count per person per registration event. Count only those attendees who complete at least one defined module or 50% of the workshop. Do not count System meetings (meeting portion), board meetings, public hearings, other business meetings, author (or

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equivalent) speeches or luncheons. A person should not be counted as a workshop attendee for an informal, situation specific, non-workshop assistance. However, depending on the content, this informal assistance may be considered as consulting assistance.

Report the number of persons that System staff has assisted via telephone, mail, fax, and on-site contacts. This figure should represent non-unique counts. Include in this count any consultation with any member of the library staff, library board and local officials concerning the operation and management of the library and its projects. Do not count contacts relating to the administration of the System grant such as applications for mini-grants, the status of invoices to vendors or collection development allocations. Phone, fax, onsite, and mail assistance can be counted if it includes specific requests for assistance that can be provided over phone, fax, in person, or by mail, and if it provides specific information helpful to the library, library boards, and/or local officials. Do not include routine mailings and telephone conversations with System members to schedule appointments, discuss collection development orders, discuss material lending problems, etc.

Report solicited assistance, and unsolicited one-on-one or targeted group assistance in response to a System-identified issue or need, provided in any format. Also count informal training, including hands-on. Count only when substantive content has been conveyed. For example, do not count directional assistance such as providing when and where a workshop will be held. Counts for assisting librarians must be documented with logs or other defined, auditable means. Count one complete exchange on one topic as 1 assist. If there are three distinct topics in one phone call, for example, then there are 3 assists to count. Please note that an exchange on one topic may take place over multiple calls or contacts and only count as 1 assist. Use judgment in determining when an assist has concluded.

Other assistance provided that is unsolicited should not be counted under librarians assisted. Depending on the content of the unsolicited assistance it is possible that it may be counted under materials provided. Please see section above for "Number of books and other library materials provided to local libraries by the Texas Library System" to determine if the unsolicited assistance would qualify as materials provided.

When materials are provided in response to a request for information or assistance two things should be considered. First is the requestor requesting a specific material or is the System staff selecting an appropriate material to fill the request? Secondly, is there additional information or assistance being provided by the System staff to the requestor? For example, if the requestor requests specific materials which are then provided without additional assistance, count only as materials provided. However, if materials are selected for requestor and/or if additional information or assistance is provided along with the materials, then count as both and assist and as materials provided.

Report the number of persons System staff has assisted through email. This figure should represent non-unique counts of all consultations conducted by email. Include in this count any consultation with any member of the library staff, library board and local officials concerning the operation and management of the library and its projects. Do not count contacts relating to the administration of the System grant such as applications for mini-grants, the status of invoices to vendors or collection development allocations. Email assistance can be counted if it includes specific requests for assistance that can be provided over email and if it provides

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specific information helpful to the library, library boards, and/or local officials. Do not include routine email with System members to schedule appointments, discuss collection development orders, discuss material lending problems, etc.