Library of Virginia

Library Services and Technology Act (LSTA)
Grants to States Program Implementation Evaluation
Federal Fiscal Year 2018 – Federal Fiscal Year 2022

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TABLE OF CONTENTS

EVALUATION SUMMARY

Summary Introduction

The 2019 Public Libraries Survey (PLS) reported that Virginia had a total of 93 public library jurisdictions that employed 1,046.39 full-time equivalent (FTE) staff categorized as librarians (927.95 FTE are reported as having an American Library Association [ALA] accredited master's degree). Similarly, the Academic Libraries Survey (ALS) reported that 93 institutions of higher education employed 735.84 FTE librarians. According to the National Center for Educational Statistics' (NCES) Elementary/Secondary Information System (EISi), Virginia's 215 public school districts employed 1,814.44 full-time librarians.

Public Library Outlets by Locale

35% Rural
16% Town
27% Suburb
22% City

Total FTE library staff comprises about 4,165 in 382 public library outlets, with most libraries (35%) in rural environments. However, suburban outlets follow closely with 27%. There is a near-even split between the combined city-suburban (49%) and rural-town (51%) designations.

Given Virginia's population of 8,631,393[1], the state's annual Library Services and Technology Act (LSTA) Grants to States[2] program allotment from the Institute of Museum and Library Services (IMLS) of approximately $4[3] million per year translates into $0.46[4] per person on an annual basis. LSTA funds alone are inadequate to meet the library and information needs of Virginia's approximately 8.6 million residents. The Library of Virginia's (LVA) challenge is to find ways to leverage this relatively small amount of money to accomplish major, transformative results; this necessitates the strategic deployment of funds and other public and private monies in support of high-quality library and information services.

If there is one word that we would choose to describe the LVA LSTA program, it is "'enabling." The program allows public libraries to have access to more resources, training, and services. The robust relationship between the LVA Library development team and the public libraries in the state is another great equalizer. The State Library also enables the citizens of Virginia to engage and better understand their history and culture. Virginia's recorded history extends back to its founding in 1607 and much of that early history survives to this day. LVA's efforts to

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[1] United States Census Bureau, Decennial Census (April 1, 2020)
[2] The report will refer to the Library Services and Technology Act Grants to States program simply as LSTA throughout this report
[3] Four-year LSTA Grants to States allotment average ([FFY 2018 State Allotment + FFY 2019 State Allotment + FFY 2020 State Allotment + FFY 2021 State Allotment] / 4)
[4] Four-year LSTA Grants to States allotment average / United States Census Bureau Decennial Census (April 1, 2020)

preserve and make this documentary heritage accessible allows history to come alive to modern audiences. Projects like Making History: Transcribe and its transformation and expansion during the pandemic are some of the ways in which LVA facilitates this type of engagement. Furthermore, innovations such as the processing of email archives using artificial intelligence (AI) methods allows for truly unique and groundbreaking services.

There are three goal statements in the *Library of Virginia LSTA Five Year Plan 2018 to 2022*. They are:

GOAL 1: Foster the development of the evolving neighborhood/community library as a center for lifelong learning and civic engagement.

GOAL 2: Facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community.

GOAL 3: Support the training and development of proactive library leadership and skilled staff to meet the rapidly changing environment.

Through the LVA's implementation of the LSTA program, LSTA dollars are enabling access to electronic resources, cultural heritage, and expert trainers and consultants. The evaluators conclude that the nurturing model reflects the reality of library service in the Old Dominion.

Agency's Internal Assessment and Evaluator's Assessment

As part of the assessment process, the evaluators asked the Librarian of Virginia, LVA's LSTA Coordinator, and other key staff members identified by the Librarian of Virginia to offer their joint appraisal of the progress their agency had made toward achieving each of the three goals included in the Library of Virginia's 2018–2022 five-year plan. The evaluators prefaced their request for this internal assessment by noting the fact that the state was only three years into the implementation of the five-year plan. Consequently, it was acknowledged that it was unlikely that any of the goals would be completely achieved. Table 1 offers a summary of both the Library of Virginia's internal assessment and the evaluators' conclusions.

Table 1 - Library of Virginia's and Evaluators' Assessment of Achievement		
GOAL	**Library of Virginia's Internal Assessment**	**Evaluators' Assessment**
GOAL 1: Foster the development of the evolving neighborhood/ community library as a center for lifelong learning and civic engagement.	Partly Achieved	Partly Achieved
GOAL 2: Facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community.	Achieved	Achieved

Table 1 - Library of Virginia's and Evaluators' Assessment of Achievement		
GOAL 3: Support the training and development of proactive library leadership and skilled staff to meet the rapidly changing environment.	Partly Achieved	Partly Achieved

Summary of Virginia Expenditures for FFY2018-FFY2020

Goal	Goal Title	Expenditures	Percentage
Goal 1	Foster the development of the evolving neighborhood/ community library …..	$1,297,622.01	10.91%
Goal 2	Facilitate access to information and the discovery of knowledge and cultural heritage..	$9,649,803.86	81.11%
Goal 3	Support the training and development of proactive library leadership and skilled staff…	$653,239.99	5.49%
	LSTA PROGRAM ADMINISTRATION	$297,046.14	2.50%
		$11,897,712.00	

GOAL 1: Foster the development of the evolving neighborhood/community library as a center for lifelong learning and civic engagement.

Goal 1 expenditures represent 10.91% of Virginia's total LSTA allotment for the FFY 2018–FFY 2020 period. *In School and Out of School Learning* represents 6.56% of the LSTA allotment and *School Readiness* represents 4.34% of the allotment. Even though LVA is not part of the Department of Education, this area relates to the work of school librarians, in addition to the work of the public libraries.

The evaluators conclude that the Library of Virginia has **PARTLY ACHIEVED** Goal 1. Much valuable work is done through these two projects and the collaborations with the school libraries and the Department of Education are wonderful. The evaluators held a focus group with school librarians in the commonwealth who expressed their gratitude for the supportive services provided by LVA and the wish to see a full time coordinator in the Department of Education who would work more effectively with the rich array of services LVA provides and make them more easily accessible to schools. To really move the needle in this area and fully achieve the highly aspirational goal, this work will need to continue in the future (Appendix K provides additional recommendations in this area).

GOAL 2: Facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community.

Goal 2 expenditures represent 81.11% of Virginia's total LSTA allotment for the FFY 2018–FFY 2020 period. *FindItVirginia* is the project with the largest LSTA allocation, representing 49.91% of the overall LSTA funding. It is arguably the flagship project of the Virginia LSTA program, and many justified investments have been made to maintain its relevance and expand its reach. This

work will need to continue to ensure continued high return on this investment in future years. Other important projects under Goal 2 include: *Information Technology Support, Electronic Records and Open Data (EROD), Cultural Heritage Access and Engagement (CHAE), Virginia Newspaper Project, Interlibrary Loan, Public Library Data, Genealogy Education, Lifelong Learning, Evergreen Virginia, WordPress, Document Bank of Virginia, and E-Rate.*

The evaluators conclude that the Library of Virginia has **ACHIEVED** Goal 2. From the remarkable wealth of electronic resources available through *FindItVirginia* to the many successful and innovative approaches to archival processing and digitization, from the continued support for access to resources that augment libraries' abilities to improvements in technology, and from the much needed large and small projects, this goal is truly the essence of the Virginia LSTA projects and had a remarkable record of achievement during the current evaluation period.

GOAL 3: Support the training and development of proactive library leadership and skilled staff to meet the rapidly changing environment.

Goal 3 expenditures represent 5.49% of Virginia's total LSTA allotment for the FFY 2018–FFY 2020 period. There are two projects in Goal 3, *21st Century Work Skills,* funded with 3.82%, and *21st Century Library and Community Stakeholders*, funded with 1.67%. For a relatively modest LSTA investment, a huge return has been achieved from these projects, fulfilling the promise of this goal even though offerings may not have been delivered as planned due to the pandemic.

The evaluators conclude that the Library of Virginia has **PARTLY ACHIEVED** Goal 3. The successful pivot and welcoming reception of all the additional professional opportunities offered through this relatively small LSTA investment supports the evaluators' judgment that this goal is **PARTLY ACHIEVED** in the midst of adversity. Furthermore, with additional capacity through a new hire, this area is enjoying a renewed focus. Consulting on specialized face-to-face training for staff development/staff days continues to be a robust part of the LVA offerings, with topics including customer service excellence, marketing library services, and communications and change management.

Measuring Success Focal Areas and Their Corresponding Intents

The Virginia LSTA program addresses four of the six Measuring Success focal areas, and primary among them are the Information Access and Institutional Capacity focal areas, with seven projects in each one of these categories. Two projects address the Lifelong Learning focal area and one project addresses the Human Resources focal area. All in all, the projects that cover the Information Access focal area account for the largest portion of the LSTA allocation (see Appendix F). Overall, the LSTA program in the commonwealth of Virginia weighs heavily on information access but also has a healthy variety of additional focal areas and intents. For specific achievement of results, please consult section A-1 in the report.

Groups Representing a Substantial Focus
The IMLS Five-Year Evaluation Guidelines ask that evaluators address whether the groups listed in Appendix G represent a substantial focus for the Five-Year Plan activities. For the purposes of this question, substantial focus represents at least 10 percent of the total amount of resources committed across multiple years.

FindItVirginia and *Information Technology* are the two projects that meet the criterion of the 10 percent expenditure and serve primarily the Library Workforce. No other single project qualifies as being a substantial focus on the basis of the 10 percent (10%) expenditure specified by IMLS in the evaluation guidelines. However, in total, 10 of the 17 projects serve the library workforce; the rest of the projects serve a healthy variety of other target populations, including families and children with the *In School and Out of School Learning* and *School Readiness* projects (see Appendix G for more detail).

Methodology
The evaluators used a mixed methods approach. Data gathering included (a) interviews with agency staff members, (b) interviews with project managers for various SPR-reported projects and activities, (c) focus group discussions with project teams, (d) focus group discussions with project and activity beneficiaries, and (e) a broad-based short survey for library staff and stakeholders with some knowledge of and engagement with LSTA-funded activities.

Communication
LVA will share the key findings and recommendations via both electronic means and presentations to interested communities. The evaluation report will also be publicly available on the agency website.

Most of LVA's projects were disrupted during this evaluation period due to the pandemic; there were no in-person events, and partner organizations had either closed or curtailed services dramatically while distracted by other needs. LVA staff also went fully remote in March 2020. However, both staff and partners found creative ways to cope. The community, once again, did not give up, and people sought out new, safe activities that were possible under quarantine. The transcription platforms were particularly popular and projects like the processing of email archives using artificial intelligence (AI) methods were truly unique and groundbreaking.

In looking forward, LVA's signature project *FindItVirginia* can continue to be promoted, with its utilization spread to every school and student in the commonwealth. Outreach activities (both virtual and physical) will need to continue to occur, and careful consideration given when planning for virtual or physical or mixed mode events. The "phydigital" world is here for libraries to realize in their future services and activities.

EVALUATION REPORT

Evaluation Introduction

Given Virginia's population of 8,631,393[5], the state's annual Library Services and Technology Act (LSTA) Grants to States[6] program allotment from the Institute of Museum and Library Services (IMLS) of approximately $4[7] million per year translates into $0.46[8] per person. LSTA funds alone are inadequate to meet the library and information needs of Virginia's approximately 8.6 million residents. The Library of Virginia's (LVA) challenge is thus to leverage its relatively small amount of money to accomplish major, transformative results; this requires the strategic deployment of both the funds and other public and private monies in support of high-quality library and information services.

The **Library of Virginia LSTA Five Year Plan 2018 to 2022** has three goals. Each goal is stated below, and LSTA-funded activities carried out in support of the goal are described (see Appendix H for more information). Finally, the evaluators' assessment of whether each goal has been achieved, partly achieved, or not achieved is presented.

All three goals aim at strengthening public libraries primarily by placing the institution in the center of the community as an anchor institution (Goal 1), ensuring it has the resources it needs (Goal 2), and ensuring it has well-qualified staff (Goal 3). Goal 1 emphasizes lifelong learning and civic engagement; Goal 2, a community engaged with the information content; and Goal 3, professionals that are skilled to meet the "rapidly changing environment."

Goal 1 Retrospective Assessment

GOAL 1: Foster the development of the evolving neighborhood/community library as a center for lifelong learning and civic engagement.

Goal 1 Description and Discussion

Following are the titles of the projects and the total amount of LSTA FFY 2018–FFY 2020 funding that was expended on activities undertaken in support of Goal 1.

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[5] United S Census Bureau, Decennial Census (April 1, 2020)
[6] The report will refer to the Library Services and Technology Act Grants to States program simply as LSTA throughout this report
[7] Four-year LSTA Grants to States allotment average ((FFY [Federal Fiscal Year] 2018 State Allotment + FFY 2019 State Allotment + FFY 2020 State Allotment + FFY 2021 State Allotment) / 4)
[8] Four-year LSTA Grants to States allotment average / United States Census Bureau Decennial Census (April 1, 2020)

Goal 1 Projects & Expenditures

Projects	THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL	PERCENTAGE OF TOTAL LSTA EXPENDITURES
In School and Out of School Learning	$780,755.26	6.56%
School Readiness	$516,866.75	4.34%
Goal SubTotal	$1,297,622.01	10.91%

Goal 1 expenditures represent 10.91% of Virginia's total LSTA allotment for the FFY 2018–FFY 2020 period. *In School and Out of School Learning* represents 6.56% of the LSTA allotment and *School Readiness* represents 4.34% of the allotment. Even though LVA is not part of the Department of Education, this area relates both to the work of school librarians and the work of the public libraries.

In School and Out of School Learning helped public and school libraries meet the needs of school populations in Virginia by supporting student learning inside and outside of classrooms. *"[W]ithout practice students lose reading skills over the summer months and children from low-income families lose the most."*[9] According to America After 3PM, 18% of Virginia's children were alone and unsupervised between the hours of 3 and 6 p.m. These children were unsupervised after school in 2014 for an average of 7.73 hours per week. Most surveyed parents agreed that after-school programs can help excite children about learning, help children gain workforce skills, and help reduce the likelihood that youth will engage in risky behaviors.[10] The 2020 edition of America After 3PM finds that the number of middle schoolers who are not in an after-school program, but would enroll if a program were available to them, had increased by nearly 1 million students since 2014, up from 4 million students in 2014 to slightly fewer than 5 million students in 2020. For these reasons, the LVA coordinates and supports summer reading programs and provides libraries with resources and materials, such as Nature Backpacks and STEM Kits, to help create enriching, educational activities for children outside of school.

Demographic data show that school enrollments were growing faster before the pandemic in the northeast part of the state. Consequently, there is a greater need to serve younger children in that area, which indeed is more affluent and has more resources.[11] Though enrollment does not equate with school readiness needs, it informs the extent of the population that may need services. In combination with the knowledge that the northeast part of the state is more affluent and has more resources, it is important to remember that the school readiness needs are more severe in areas where the populations are declining and the poverty rates are higher.

Virginia's definition of School Readiness is well documented: "School readiness" describes the capabilities of children, their families, schools, and communities that will best promote student success in kindergarten and beyond. Each component – children, families, schools and

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[9] America After 3 PM, Afterschool Alliance, "America After 3PM among Middle School Youth." February 2021.
[10] Virginia Partnership for Out-of-School Time (VPOST).
[11] Hamilton Lombard. (2022) "School Enrollment in a Post-Pandemic Virginia." University of Virginia, Weldon Cooper Center for Public Service, StatCh@t, web series from the Demographics Research Group.

communities – plays an essential role in the development of school readiness. No one component can stand on its own."[12] This definition intersects with the work public libraries are doing in this area, especially in *Ready Children*, *Ready Families*, and *Ready Communities*, three of the four components of the School Readiness initiative.[13]

K-12 Enrollment Change 2010 to 2019
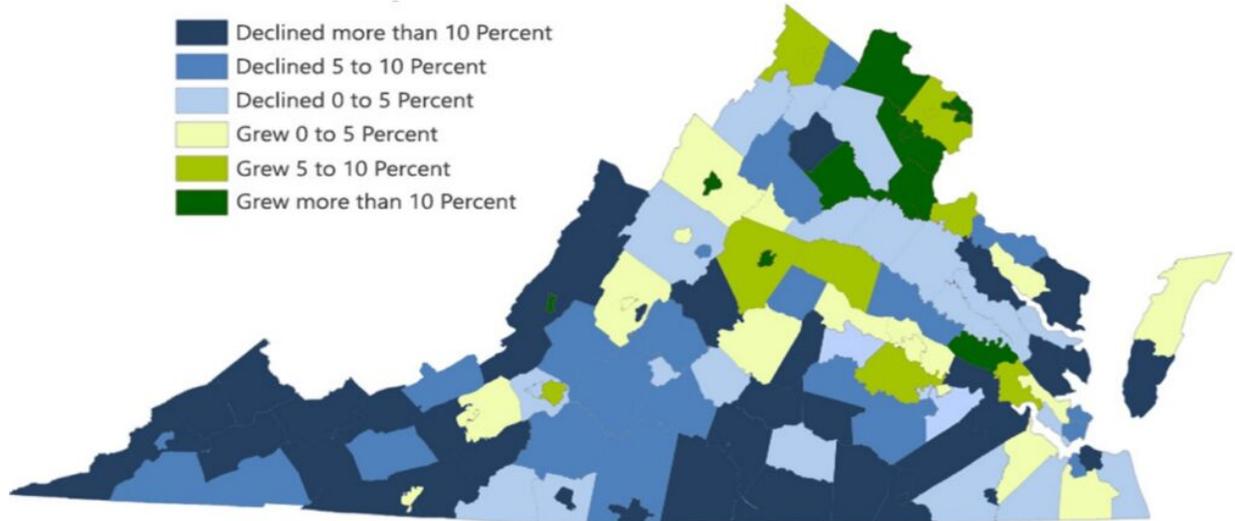
Population and Poverty Status in Virginia (ACS)
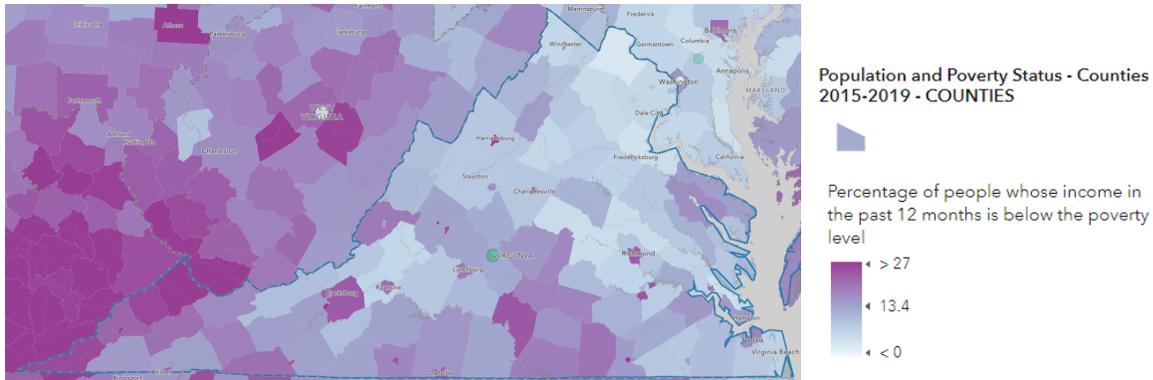
A variety of activities were supported through the *In School and Out of School Learning* project, including Nature Backpacks, STEM Kits, Summer Food Program, Summer Reading Program, eBooks for K12, Flow Circus-Fail Better: Skill Toys for Teens, and Youth Services Notes.

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[12] Virginia's Definition of School Readiness:
https://www.doe.virginia.gov/early-childhood/school-readiness/index.shtml
[13] Ibid.

In School and Out of School Learning	2018	2019	2020
Cost of summer reading program materials	$ 23,524.90	$ 16,507.80	$ 51,760.46
# of Nature Backpacks	816	816	816
# of additional backpacks purchased		25	25
# STEM kits	30	30	30
# Summer Meal Sites	62	94	94
# licensed databases acquired	4	4	4

In collaboration with the Virginia Department of Conservation and Recreation and the Science Museum of Virginia, the LVA provided 213 libraries across the state with Nature Backpacks, distributing a total of 816 backpacks (see figures above). The State Library has also purchased materials for 25 more backpacks in order to expand the program to 8 additional libraries. The backpacks are intended to be used while visiting a Virginia State Park, and each backpack contains materials and curriculum cards to help guide families, homeschoolers, scout groups, and other interested parties in learning scientific concepts while exploring nature.

The LVA has also created four types of STEM Kits for public libraries in collaboration with the Science Museum of Virginia. Each kit has an accompanying curriculum and includes instructional videos and supplies. Chemistry and botany kits were completed and distributed last year, while astronomy and maker kits were completed and partially distributed this year. In total, 30 STEM Kits were created, but due to the COVID-19 pandemic, some libraries were not open to receive their kits. Many directors that participated in the in-person table-top discussions mentioned how important the kits were during the pandemic.

Another focus within this goal was providing much-needed resources during the summer months, when school resources and enrichment are not available and many children experience issues including lack of access to food and a loss of educational gains made during the school year, particularly in reading skills. The LVA, in partnership with the Virginia Department of Education, encouraged Virginia libraries to participate in the governor's initiative to end childhood hunger in Virginia, especially during the summer months. To assist with this effort, the LVA partnered with No Kid Hungry to target the areas with the greatest needs and provided promotional and support materials, including a marketing plan. Due to COVID-19, many libraries were not open during summer 2020 and therefore did not participate as summer meal sites.

The Library Development and Networking Division of the LVA also supported the annual Summer Reading Programs in Virginia's public libraries, supplying manuals, reading logs, bookmarks, and promotional materials. The 2020 Collaborative Summer Library Program (CSLP) theme was "Imagine Your Story". Approximately $16,561.80 in funds was expended for Summer Reading Program membership, manuals, and materials. Electronic resources for

children was another focus for LSTA funding, and monies were spent to improve collection diversity and provide access to developmentally appropriate research materials for a wider range of ages. To this end, eBook subscriptions with EBSCO continued to build collections specifically focused on early literacy and K-12 users. In the evaluator survey, the *In School and Out of School Learning* Project was considered by the greatest number of respondents to be most impactful, with 69% of the people recognizing it as such (see Appendix I for a summarization of the survey results).

School Readiness focused on providing infants, young children, and their families with the resources and competent adult guidance needed to prepare the children for formal education. To this end, the LVA worked with other state agencies to provide resources, including the family literacy websites DaybyDayVa.org and sp.DaybyDayVa.org, the 1,000 Things Before Kindergarten program, and World Book's Early Learning electronic product. The LVA also brought together subject specialists for a full-day training for youth services staff around the commonwealth and supported "Read Every Day - RED" in Richmond City and Louisa County.

The evaluators held a focus group with members of the Executive Council of School Librarians to discuss the impact of these LSTA-funded projects and explore ways to move forward in the future. Appendix K summarizes the results of the ways in which LVA currently relates to the work of school librarians. A key recommendation is the facilitation of more communication and collaboration between LVA and the Virginia Department of Education (VDE); this would be best achieved by having a state school library consultant in the VDE who could engage with both LVA and local school districts.

Goal 1 Conclusion - Retrospective Question A-1

A-1. To what extent did LVA's Five-Year Plan activities make progress toward Goal 1?

The evaluators conclude that the Library of Virginia has **PARTLY ACHIEVED** Goal 1. Much valuable work has been done through the two projects funded by LSTA, *In School and Out of School Learning* and *School Readiness*, and through the wonderful collaborations between school libraries and the VDE. The school librarians in the commonwealth expressed their gratitude for the supportive services provided by LVA. Moving forward, they wish to see full-time coordinators in the Department of Education; these coordinators would work more effectively to make the rich array of services provided by the LVA more easily accessible to schools. To really move the needle in this area and thus fulfill this highly aspirational goal, the ties between public and school libraries will need to continue to be strengthened through stronger and more intentional collaborations. Appendix K provides additional recommendations on how LVA can support school libraries and librarians in the future. Ultimately, the goal is to have children, families, and communities ready for school.

Goal 2 Retrospective Assessment

GOAL 2: Facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community.

Goal 2 Description and Discussion

The following table includes the titles of the projects and the total amount of LSTA FFY 2018–FFY 2020 funding that was expended on activities undertaken in support of Goal 2.

PROJECT TITLE	THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL	PERCENTAGE OF TOTAL LSTA EXPENDITURES
FindItVirginia	$ 5,938,582.17	49.91%
Information Technology Support	$ 1,309,942.08	11.01%
Electronic Records and Open Data (EROD)	$ 749,663.19	6.30%
Cultural Heritage Access and Engagement (CHAE)	$ 415,258.09	3.49%
Virginia Newspaper Project	$ 231,635.21	1.95%
Interlibrary Loan	$ 225,716.86	1.90%
Public Library Data	$ 192,984.11	1.62%
Genealogy Education	$ 165,982.57	1.40%
Lifelong Learning	$ 162,040.53	1.36%
Evergreen Virginia	$ 102,397.33	0.86%
WordPress	$ 91,324.95	0.77%
Document Bank of Virginia	$ 34,845.58	0.29%
E-Rate	$ 29,431.19	0.25%
GOAL SUBTOTAL	$ 9,649,803.86	81.11%

Goal 2 expenditures represent 81.11% of Virginia's total LSTA allotment for the FFY 2018–FFY 2020 period. *FindItVirginia* (FIVA) was the project with the largest LSTA funding, representing 49.91% of the overall LSTA allocation. Arguably, it is the flagship project of the Virginia LSTA program and many justified investments have been made to maintain its relevance and expand its reach. Continuing to support its usability and promote awareness and utilization of this resource will be a critical factor in ensuring high return on this sizable LSTA investment in future years.

FindItVirginia is a cost-effective method of providing a core set of electronic content statewide. A major focus of this project is the leveraging of the investment made by both the LVA and local public libraries electronic resources through the integration of these resources into an easy-to-use interface that works on all devices. The project also aims to improve the use of the resources by K–12 students, specifically for the completion of homework during the pandemic. The pandemic has provided unique opportunities for FindItVirginia; due to the urgent need for online content in school libraries, LVA, in collaboration with the Virginia Association of School Libraries and the vendors, produced an implementation guide for all libraries. This guide

included integration of FindItVirginia with the various learning management systems deployed by the school systems. This opportunity not only helped schools implement the program, it also brought in school systems who did not know that FindItVirginia resources were even available.

Several databases were acquired as part of FindItVirginia, including EBSCO: Masterfile, ReadIT, Gale Cengage: Kids Infobits, Novelist Plus, Career Transitions, and Rocket Languages. Career Transitions had a cumulative total of 11,408 sessions during the evaluation period, whileRocket Languages had 10,093 users. Usage of the other FindItVirginia databases from 2018–2020 can be seen in Appendix J, which includes Counter 5 compliant data (when available). The usage data in the appendix also indicates those resources that were only available for a specific time period. FindItVirginia has undergone many changes since the last evaluation, including a redesigned online interface. Work in this area needs to continue, as FindItVirginia is very important to the success of the Virginia LSTA program as a whole. In the evaluator survey, FIVA was named the second most impactful service, with 60% of respondents recognizing it as having the most impact. (Appendix J provides additional details and analysis including usage statistics.)

Information Technology Support	Average over three years
Cost	$436,647.36
# equipment	1
# hardware items	69
# software items	32
# materials/supplies acquired	71

The *Information Technology Support* project (11.01% of the LSTA allocation) provides the infrastructure and technical support for all LVA digital collections. This includes pro-rated salary support for the IT staff needed to support LSTA-funded projects. It also funds a proportion of maintenance (hardware and software), support, upgrades, software licenses and telecommunications related to LSTA projects, and provides continuing support for both current and previously funded LSTA projects.

Electronic Records and Open Data (EROD) (6.3% of the LSTA allocation) aimed to facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community. This project included a continued partnership with University of Waterloo researchers to solidify and incorporate machine-assisted review into the electronic records processing protocol. It also involved email processing and Web archiving for state government documents and continued development of Virginia's Open Data Portal. The work on deploying AI approaches for digital preservation is groundbreaking and makes LVA a true leader and a pioneer in the profession. The remarkable efficiencies of using AI for archival processing are captured in the attached table;in 2019, 6 million records were processed compared to 385 thousand just the year before.

Electronic Records & Open Data	2018	2019	2020
Cost (project total)	$94,800	$535,353	$119,510
Cost (email processing)	$0	$435,000	$0
# of records processed	385,016	6,600,000	5,128,622
# of records deemed "open"	127,331	1,600,233	1,227,203
Note	Remainder of Kaine/Free work done with Waterloo	Warner & McDonnell/LSTA $ used to pay for AI	McAuliffe/LVA $ used to pay for AI

EROD's Professional Participation activity ensured that LVA staff remained active in the virtual presentation world, specifically in the area of electronic records management. Notable presentations included:

- [Roger Christman and Dr. Anthea Seles](#) discussing artificial intelligence as a part of the Council of State Archivists' "In Conversation With" webinar series, focusing on the use of AI to process the Governor Robert McDonnell's administration email
- Roger Christman, Gordon Cormack, and Maura Grossman virtually presenting at the Best Practices Exchange on May 19, 2021, focusing on their work on the Governor Robert McDonnell administration email in their presentation, "Welcome to the Machine: Technology-Assisted Review (TAR) at the LVA"
- Kathy Jordan, Interim Virginia State Archivist; Sarah Koonts (NC State Archives); Alan Ramsey (CT State Library); and Tyler Stump (PA State Archives) sitting on a panel for a Council of State Archivists (COSA) webinar, "Advocacy and Electronic Records," on October 12, 2021, with moderator Josh Hager (NC State Archives); the panel discussed advocating for proper records management for electronic records and for strong practices in digital preservation

The library completed processing of the emails for the following governors as part of their partnership with the University of Waterloo: Mark Warner (2002–2006), Bob McDonnell (2010–2014), and Terry McAuliffe (2014–2018). The last remaining bits of the Warner and McDonnell emails were reviewed in the fall of 2020, while the McAuliffe records were processed by Waterloo and reviewed by library staff in 2021.

McAuliffe Administration (including Lt. Gov. Northam) numbers: Sent to Waterloo for TAR review - PST files = 846 # of Emails = 5,128,622 (10,940,979 prior to deduping)	
Review by LVA Staff = 51,617 Non-record found during review = 11,590 Open found during review = 23,375 Open-redact found during review = 11,441 Restricted found during review = 5,120 Other found during review = 43 Total LVA staff time for review = 200.25	Final results of TAR processing/LVA review - Non-record = 3,862,963 Open = 1,237,203 Restricted = 17,127 Open after redaction = 11,329

In the upcoming year, archival staff will go through the records requiring redaction to manually redact sensitive information in the McAuliffe collection. Progress has also been made toward making open Warner and McDonnell emails publicly available, with expected completion in 2022, when the library's Rosetta (digital preservation/asset management) implementation is completed. The Rosetta implementation has been slowed somewhat because of an issue with the platform's full-text indexing, but that is nearing resolution with Ex Libris.

EROD also saw continued collection and management of state government archival Web collections through a partnership with Internet Archive (Archive-It). COVID-19 specific sections of state agency websites were crawled more frequently, and the Virginia Dept. of Health's COVID-19 section of their site was captured daily.

Governor Ralph Northam Administration Web Archive, 2018–2022
- Includes websites for the governor, cabinet, issues, and initiatives. Also included are websites of the first lady, lieutenant governor, and attorney general. Also includes YouTube videos of the governor's COVID-19 briefings

Virginia's 2019–2020 Federal Political Landscape Web Archive.
- Includes websites of Virginia's congressional delegation and 2020 campaign websites for candidates and incumbents

Virginia's 2021–2022 Federal Political Landscape Web Archive
- Includes websites of Virginia's congressional delegation and 2022 campaign websites for candidates and incumbents

Virginia's 2020–2021 State Political Landscape Web Archive
- Includes websites of members of the Virginia General Assembly and 2021 campaign websites for candidates for the Virginia House of Delegates, governor, lieutenant governor, and attorney general

COVID-19: Virginia Public Schools and Higher Education Collection
- Includes Virginia school division websites and COVID-19–specific websites for Virginia's higher education institutions

Work continued on expanding the offerings and effectiveness of Virginia's Open Data Portal (VODP). Notable additions from the past year included a federation of datasets between the VODP and the Norfolk City (Va) Open Data Portal, as well as datasets that support Virginia's Equity in Action and Equity at a Glance dashboards. Work also began on the data dashboards for Governor Northam's Roadmap to End Hunger. The End Hunger dashboards are a joint effort between the several commonwealth agencies & the Federation of Virginia Food Banks. The LVA supports the ingest and sustainability of the raw data in the Open Data Portal. The library also added datasets for 16 of the LVA collections.

Cultural Heritage Access and Engagement (CHAE) (3.49% of the LSTA allocation) focused on the development of new tools, services, and programs that foster user engagement with and access to cultural heritage materials and government records. CHAE encourages the public to explore collections in interesting and flexible ways. This project included four activities in the most recent year of the evaluation: Transcribe-a-Thons, Transcribe Collection Development, Yearbook Digitization Project, and From the Page Enhancement Collaboration.

FromThePage
@_FromThePage_

We did it! Volunteers just transcribed 1,000,000 pages on FromThePage.com

What was the millionth page?

1,000,000
PAGES TRANSCRIBED WITH FROMTHEPAGE

2:32 PM · Dec 28, 2020 · Twitter Web App

Making History: Transcribe encompasses three key elements: 1) transcriptions that make the content more accessible because they enable full-text searching and the documents are more "readable" in PDF format; 2) more importantly, its role as an entry point for people who would otherwise not have an opportunity to engage with or even think about historical/cultural heritage records and documents; and, 3) the advantage it has taken of the explosion in crowdsourcing's popularity among cultural heritage institutions during the pandemic. For the comparatively small amount of LSTA funds spent on the project, it is one of the library's most consistently successful outreach and engagement projects, with the added benefit of making the digital collections available and accessible. Anecdotal feedback indicates that people often become invested in providing their best efforts on transcriptions, as they are giving voice to the people in the records. Transcribers also report feeling moved by and connected to these stories of other people from 50 or 100 or 200 years ago.

During this evaluation period, the goal of CHAE was the continued development of relationships across the state and the promotion of MakingHistory: Transcribe as a crowd engagement tool. To that end, the library sought a continued partnership with HandsOn Greater Richmond, as well as the promotion of relationships with public libraries. CHAE also focused on content previously digitized from their collections, with in-house and remote Transcribe-A-Thons, engagement with high school and higher education institutions about using MakingHistory: Transcribe in the classroom, expanding the use of Transcribe for corporate team volunteer events, finding ways to promote remote learning/training; investigating a new Making History: Transcribe platform; and working with Brumfield Labs/From the Page to enhance structured transcription ("forms"). In addition, LVA continued the Public Library Yearbook Digitization Project, a partnership with Lyrasis and the Internet Archive. This very successful program promotes access to local historical content held in Virginia's public libraries. The LVA also entered into a partnership with History Unfolded to bring the United StatesHolocaust Memorial Museum's project together with the LVA's vast newspaper collections.

LVA also participated in a collaborative effort with eight other state archives and From the Page to develop enhancements to the platform. Thanks to the generosity of two local organizations, The Friends of the Virginia State Archives and the Genealogical Research Institute of Virginia, staff from LVA were able to serve on the Steering Committee for the project.

As people sought out new quarantine activities, the transcription platforms exploded in popularity, as the table below demonstrates (a tenfold increase between 2018 and 2020).

Cultural Heritage Access and Engagement	2018	2019	2020	Total
Items digitized	470	406	20,122	20,998
Items digitized and made available to the public	1,967	3,406	20,122	25,495
Collaborator Stats				
Collaborators	191	313	384	
Pages transcribed	14,897	11,852	14,477	
Page edits	5,751	6,467	12,062	
Virginia Yearbook Digitization (views)			225,064	
Virginia Newspaper Project (# of pages)	55,000	100,000	155,000	310,000

The ***Virginia Newspaper Project*** (1.95% of the LSTA allocation) completed the digitization of a wide assortment of papers:
- 2018: over 175 titles published as part of the Civilian Conservation Corps (CCC) program; the Virginia Newspaper Project also worked on and completed a varied list of more than 25 Virginia imprint titles, totaling 55,000 pages processed
- 2019: selection of regional titles such as the *Suffolk News-Herald* and the *Farmville Herald*, totaling 100,000 pages processed
- 2020: selection of regional titles such as the *Arlington Daily Sun*, the *Lebanon News*, the *Valley Virginian*, the *Quantico Leatherneck,* and the *Farmville Herald*, totaling 150,000 pages processed

As a result of this work, patrons both local and worldwide now have free access to an important selection of newspapers that span the state both in geography and time.

The *Interlibrary Loan (ILL)* (1.9% of the LSTA allocation) project continued to help the LVA provide access to its collection across the state. ILL service, library to library, is a substantial resource that allows the public library community and other organizations to obtain resources not readily available in their local communities. It provides additional support to the public library by locating, packing, and shipping materials to the borrowing library on behalf of their patrons. LSTA funds were used during this cycle to support postage, mailing supplies, and staff time devoted to this service. The majority of the LVA's collection has not been digitized and is only available in its original or microform format. Interlibrary loan allows patrons in locations outside of Central Virginia to use many of those materials without traveling to Richmond. Patrons may view the catalog and databases online, then go to their local library and request materials through interlibrary loan. If the material is available and circulates, it is sent to the local library for the patron's use.

Outgoing loans of microforms, books, and government documents have decreased over the past few years; this is most likely due to several factors, including the ongoing digitization of materials by institutions. With increased postage and shipping fees, other lending institutions have cut services or raised charges for outgoing loans, while the library does not charge for this service. However, the library is sometimes the only source for rare and unique Virginia materials. The library is a net lender of ILL materials by a wide margin, typically lending 4 to 5 times as many items as it borrows. The program also enjoys high fill rates—usually more than 70 percent of requests.

Interlibrary Loan	2018	2019	2020	TOTAL
Cost	$80,808.91	$59,469.45	$85,438.50	$225,716.86
Total number of items circulated	6,208	4,640	2,723	13,571
Average number of items circulated / month	517	387	227	377
Total number of ILL transactions	5,552	1,857	1,789	9,198
Average number of ILL transactions / month	462	155	149	255

The *Public Library Data* (1.62% of the LSTA allocation) project provided the LVA and the commonwealth's public libraries with software applications for the collection, evaluation, comparison, and analysis of public library fiscal year statistics. The project focused on general information, data concerning library programs and services, technology, income, expenditures, and capital projects. Additionally this project is used in reporting statistics to IMLS and the Department of the Census to support the national public library data initiative.

The goal of the *Genealogical Education* (1.4%) project is to develop an ongoing relationship with new and experienced researchers interested in developing a proficiency in tracing family and community history. By developing a series of workshops that introduce and expand upon participants' skill, the LVA aspired during this funding cycle to create a new generation of patrons for the collections. To that end, the project focused on the expansion and modification of the library's series of on-site half-day workshops throughout the year. The workshops include:
1. Two introductory workshops for persons new to the field of genealogy. These workshops explore the process of developing one's family tree and the unique collections the LVA can bring to bear in the process. Based on participant feedback and evaluation, the library will offer two different beginner-level workshops, one for a general introduction to genealogy and one for a general introduction to Virginia genealogy.
2. Two workshops specifically geared toward persons doing research in specific areas, such as military records. These sessions are more intermediate in nature and tailored to fit these specific areas of genealogical research. Because there are specific challenges to finding records in these areas, these sessions provide guidance on what those records are, their limitations, and how to piece them together to create coherent threads in a family's history
3. One to two workshops that demonstrate what resources are available online, how to find them, and how to use them

4. One to two thematic workshops that complement other major projects and initiatives. For example, workshops on African American genealogy to support projects like *Virginia Untold: The African American Narrative* or a workshop on records related to the current exhibition

5. One day-long conference featuring a guest speaker and several sessions led by library staff

From 2018 through 2020, the Library ran 140 sessions of genealogical programs as a part of this project. The library also worked to continue developing an online, self-directed series of modules on how to conduct genealogical research, in hopes of encouraging users to explore the library's archives and start their in genealogical research. The library also engaged with users interested in genealogy education via social media.

The *Lifelong Learning* project (1.36%) supports lifelong learning by designing and implementing programs that encourage interaction and engagement with the subject matter at hand. This project includes activities like tours of the LVA, Road Scholar Tours, the Annual Brown Teacher Institute, the Virginia Humanities Fellow Talk, and other talks on topics of interest. The goal is to cultivate an enhanced appreciation and understanding of the state's history and culture and awareness of the scope and uses of the library's collections in library patrons. The library's programs incorporate civic engagement as a key component of its presentations, allowing patrons to come away with a keener awareness of how the past has influenced the present (for example, "Becoming American: A Documentary Film and Discussion Series on Our Immigration Experience"). Programs are chosen to appeal to as broad a swath of Virginians as possible and consist of a combination of book talks, panel discussions, research updates, and tours of the library's reading rooms and exhibitions. The focus of this program has been on in-person events; thus, during the pandemic, there was a hiatus. There is no outcome data recorded in the SPR for the activities reported in this project. The pandemic also forced a greater reliance on distance programming, coinciding with the LVA's current efforts to expand virtual programming agency wide. The goal is to see these projects expand their reach and impact in the future.

Evergreen Virginia (0.86%) provides a very affordable open-source ILS to interested libraries, who can then integrate this offering into websites and mobile technology. The priority of this project has been to transition libraries from school-based software or old software that is no longer supported. Eleven libraries have migrated to Evergreen. One remaining eligible library has not migrated. One library left the consortium in 2020. In total, from 2018 to 2020, Evergreen Virginia circulated 2,222,680 items, for an average of 61,741 items circulated per month. LVA has provided scholarships to 24 people to attend the International Evergreen conference and provides quarterly office hours with consultant staff for continuing education.

Providing site hosting and Web development support, the *WordPress* (WP) project (0.77% of the LSTA allocation) supports libraries who do not have the capacity to provide a dynamic and interactive website to meet the needs of their community. Services include a site checker for broken links and accessibility control. Small libraries with limited funding can use WordPress to develop a professional-looking website that gives patrons quick access to catalogs, databases,

calendars, information, and events. Currently, 21 libraries utilize this service, with two more in process for FY21.[14] A survey conducted by LVA of the WP libraries shows that overall libraries are pleased with the tool (82% are very or somewhat satisfied with the LVA WordPress site). A summary of the WP survey appears in Appendix E. Here are some ways respondents have highlighted the usefulness of the service:

> *I have received feedback that the website is easy to navigate.*

> *We absolutely love the upgraded Wordpress tools. I enjoy having control over our site to add whatever we need. We don't depend on a webmaster or our local government entities to provide web space for us, which is a real gift and gives us the freedom we need to provide information in a timely manner. With our new upgraded website, I am very pleased with LVA's Wordpress service and I think our website quality rivals any library's.*

> *The huge slider has been helpful with displaying current information that we would like to prominently promote library events.*

> *It's invaluable to have a web presence these days. we couldn't do business without it!*

> *Because it is quick and easy to edit we can respond quickly such as adding information about distributing COVID tests onto the site in about 20 minutes of time. Easy to communicate last minute closures such as for power outages to customers. Reliable platform that very rarely crashes so customers can always get information and access to our digital resources*

Some desired improvements include an event calendar; greater ease of personalizing the site for the library; more flexibility in editing headers and footers; and better mobile optimization:

> *With the pandemic impacting a shift to virtual programming and in-person program occupancy limits, we had to go to an outside vendor for a new event calendar/event registration platform because the default event calendar that came with our Wordpress site (and any free widgets that we could easily add to it and use) weren't going to be able to do what we needed. It would be nice if LVA also looked into adding/funding a Wordpress event calendar that featured customizable event registration and event registration notification emails.*

Document Bank of Virginia (DBVa) (0.29% of the LSTA allocation), is a project developed by the education department at the LVA. The DBVa contains in one place some of the most important documents in the history of Virginia from the library's vast collection. Maps, wills, patents, audio recordings, video clips, emails, photographs, letters, broadsides, and many other primary sources are organized by historic era, theme, and Virginia Standards of Learning. For example, the Captain John Smith, Map of Virginia in the image below is the most popular fourth grade activity in Virginia.

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[14] This project also supports the statewide database website, called FindItVirginia (https://finditva.com/) and the site directed to library staff, called InfoCenter (https://vpl.virginia.gov/).

DOCUMENT BANK OF VIRGINIA
LIBRARY OF VIRGINIA
PRIMARY SOURCES FOR EDUCATORS AND STUDENTS

Captain John Smith, Map of Virginia, circa 1606

Citation: VIRGINIA/ Discouered and Discribed by Captayn John Smith/ Grauen by William Hole 1606. John Smith (ca. 1580–1631). 1612. London. State 8, 1624 or 1627. Copperplate engraving.

Education Department, Outreach & Public Programs, Library of Virginia

Teachers, librarians, and students are able to access documents in three clicks of a mouse. Each document is available as a PDF to print out or project in the classroom. In addition to the image of the document, a transcription is provided if necessary. Two paragraphs of context are provided with each document, including definitions of key terms and citations. Historic era(s), theme(s), related Standards of Learning, and related documents are listed, along with a sidebar of suggested questions and activities for each document.

Primary sources give teachers, librarians, and students a window into events such as the end of the Civil War, the beginning of World War I, and the Voting Rights Act. These opportunities allow students to analyze the ways in which Virginia's past has been created, recorded, observed, contested, and remembered by prominent historical figures, as well as often forgotten ordinary citizens.

In 2018, this project partnered with Virginia Commonwealth University's GLOBE (Global Education) Department. GLOBE students contributed documents in the bilingual section to expand the selection. More recently, professional development sessions for teachers were organized a handful of times each year. Even though some of the specific timeline targets, such as the number of documents to be increased to 500, were not met, the staff in this unit have diligently developed processes to examine all the existing documents and ensure that they are updated to meet the agency's new inclusive language standards (the complete guide is included in Appendix L).

The LVA uses LSTA funds to subsidize full *E-Rate* support through E-Rate Central (0.25% of the LSTA allocation). Public libraries also subsidize the support by contributing a portion of their E-Rate savings. LSTA funds partially supported the full-service contract. Through this project, the LVA provided assistance during 212 reference transactions and consultations, for an average of 6 transactions or consultations per month from 2018 to 2020 (see Appendix M for more information).

Goal 2 Conclusion - Retrospective Question A-1

A-1. To what extent did LVA's Five-Year Plan activities make progress toward Goal 2?

FindItVirginia underwent a robust review and re-evaluation resulting in many updates and changes to its offerings. The final result is a more comprehensive collection of databases, including:

- EBSCO Complete for all age ranges
- Gale in Context: Elementary to support K-5 research
- Universal Class – a career, hobby, and lifelong learning platform
- Rocket Languages – a language learning platform
- Peterson's Career Preparation – a job preparation, job seeking/skill development site
- Legal Forms – a template-based, Virginia-specific customizable legal forms
- Overdrive Serial, eBook and eAudiobook Collection – this has resulted in the acquisition of RbDigital by Overdrive's parent company. This move has been beneficial to all localities whose users had to previously toggle between RBDig and Overdrive platforms to see the entirety of the collection
- Novelist Plus – a readers' advisory platform
- Junior Library Guild Digital has been added as a time-limited resource of synchronous, multi-user K-12 eBooks and eAudioBooks to ameliorate the effects of the pandemic, allowing librarians, teachers, and students the opportunity to use them for group reading materials and book report and casual reading selections.

The evaluators conclude that the Library of Virginia has **ACHIEVED** Goal 2. From the remarkable wealth of electronic resources available through FindItVirginia to the many successful and innovative approaches to archival processing and digitization, to the continued support for access to resources that augment libraries' abilities and the improvements to technology and much needed large and small projects, this goal is truly the heart of the Virginia LSTA projects and has a remarkable record of achievement during the current evaluation period despite the adversity caused by the pandemic. There are some areas of improvement for future years, such as creating better outcomes evaluation for the Document Bank of Virginia and the Lifelong Learning projects; the evaluators believe these goals are possible to achieve within the closing years of this LSTA cycle.

Goal 3 Retrospective Assessment

GOAL 3: Support the training and development of proactive library leadership and skilled staff to meet the rapidly changing environment.

Goal 3 Description and Discussion

The following table includes the titles of the projects and the total amount of LSTA FFY 2018–FFY 2020 funding that was expended on activities undertaken in support of Goal 3.

Projects	THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL	PERCENTAGE OF TOTAL LSTA EXPENDITURES
21st Century Work Skills	$ 455,060.66	3.82%
21st Century Library and Community Stakeholders	$ 198,179.33	1.67%
GOAL SUBTOTAL	$ 653,239.99	**5.49%**

Goal 3 expenditures represent 5.49% of Virginia's total LSTA allotment for the FFY 2018– FY 2020 period. There are two projects in Goal 3, *21st Century Work Skills*, funded with 3.82% of the allotment, and *21st Century Library and Community Stakeholders*, funded with 1.67% of the allotment. For a relatively modest LSTA investment, a huge return has been achieved from these projects, fulfilling the promise of this goal even though offerings may not have been delivered as planned due to the pandemic.

21st Century Work Skills (3.82% of the LSTA allocation) focuses on improving the work skills of library staff and library directors. An online calendar of continuing education opportunities was maintained, and monthly and weekly emails were provided to list online training opportunities by topic. Most of these training opportunities were free and provided valuable opportunities for libraries in Virginia to receive support and advice from the Library of Virginia, as put by one survey participant: "For small libraries like ours, the LVA staff provides invaluable advice and support. At all costs, I would want to see that continue."

The LVA has purchased course seats from archived and live webinars through People Connect Institute (PCI) and Niche Academy and also provided WebJunction courses. Webinar archives and live webinars from People Connect Institute and Niche Academy were made available exclusively to staff working in libraries located in Virginia, as were the WebJunction courses. The vast majority of participants in these courses agreed that they learned something from the training and that they planned to apply it to their personal and professional lives. Comments on these courses included:

> *"I have already started to apply what I learned in my personal and professional life."*

> *"As a result of this training, I will now start treating reader's advisory more as a relationship building exercise and not as a transaction."*

> *"PCI webinars have been carefully crafted to meet the needs of public library staff. I like that staff can print certificates all in one place via Niche Academy."*

> *"Libraries are changing so much that continuous training really aids staff with improving our services."*

> *"Received practical suggestions that I will be able to implement on a daily basis."*

> *"I have a better understanding of program planning."*

> *"Will apply what I learned personally as well as system wide."*
> *"All WebJunction webinars are terrific!"*

FY2020 funds were also used to provide access to the ALA tutorial, "Positive Interactions: Making the Library a Welcoming and Empowering Place for People with Disabilities," from August 1, 2020 to July 31, 2021. This tutorial was designed to provide an introduction to all library staff, including support staff, general professional staff, age-level and subject specialists, managers, and administrators about communicating and interacting with people with disabilities. Ninety-five library staff completed the tutorial. Through this training, library staff gained a solid understanding of the broad and diverse types of disabilities and how they impact the way people use the library and its resources. It also provided tips for effective library outreach to people with disabilities and partnerships with related organizations, customer services tips that library staff can apply to all types of library users, and recommendations for building better relationships with library users with disabilities in a way that maximizes their empowerment and engagement.

This project also included a scholarship component. Because of COVID-19, the conferences and courses went fully virtual, and instead of offering a single scholarship to one individual who attended in person, LVA was able to offer multiple scholarships and thus allow more individuals to attend. Five library staff were awarded scholarships to attend the American Library Association Conference, and twenty-six library staff were awarded scholarships to complete the "Libraries and Aging 101" course. Registrations and attendance at the meetings of the Association of Rural and Small Libraries were also supported.

The following table shows a huge jump to the number of sessions in FFY 2020 (5,602 sessions) compared to FFY 2019 (24 sessions) because of the virtual attendance of programs due to the pandemic. The Librarian's Guide to Homelessness Academy was a single program with thousands of participants.

21st Century Work Skills	2018	2019	2020
Cost	$147,902.49	$66,325.33	$142,133.62
# of sessions of all programs, in total	52	24	5,602
# different programs	9	6	4
21st Century Library and Community Stakeholders	2018	2019	2020
Cost		$66,325.33	$131,854.00

21st Century Library and Community Stakeholders (1.67 % of the LSTA allocation) focused on providing timely and accurate information services to public library directors, trustees, Friends of the Library, and local government including information on library management, grants, continuing education, and training. In FY 2018, in-person training for library trustees was provided upon request. Library trustees also continued to use the online training modules once the pandemic hit the commonwealth. For library directors, there was an annual fall meeting every year. As one of the director's the evaluators interviewed pointed out: "I really appreciate the CE and connecting with people - as a small regional library system it is important that we do

a good job of keeping up with the Joneses, most of us put our heart and soul into our work and … the training has helped [us] shine all these years."

The *Virginia Public Libraries Governing Board Trustee Manual* was updated to bring it into alignment with current library practices, and a two-hour trustee training session was administered 5 times. Trustees in both advisory and governing library boards need a clear understanding of their roles and responsibilities in order to successfully oversee their public library systems. In addition to their own roles, they are instructed on the different roles that the library director and Friends groups have to avoid confusion or resentment. Other topics covered are the Virginia Freedom of Information Act requirements for public meetings and public records and general recommendations for keeping and properly disposing of their public records. For additional trustee training, the library purchased the United for Libraries "Short Takes for Trustees" online training system. "Short Takes for Trustees" is a series of 10 short videos (8-10 minutes each) that can be viewed individually or shown during trustee meetings to stimulate discussion about the important role that trustees play in the governance of their libraries, covering topics such as:
- What it Means to be a Trustee
- Board Meetings
- Board Ethics
- Library Advocacy
- Library Policies
- Strategic Planning
- Working Effectively with Friends
- Evaluating the Director
- Board Self-Evaluation
- Succession Planning and New Board Orientation

Additionally, LVA is piloting a partnership with the Center for Nonprofit Excellence to provide custom training and consultation for non-profit libraries, Friends, and foundations. Individual consultation has also remained a robust part of this project.

A subcommittee revised Planning for Library Excellence in 2019, which was subsequently approved by both the Library of Virginia Board of Trustees and the Virginia Public Library Directors Association. The document is undergoing another revision currently with a view toward diversity, equity and inclusion as well as accessibility.

For the New Directors Institute, four new webinars were developed on relevant topics for new directors. Speakers were all from the LVA:
- Records Management for Library Directors
- Performance Management
- State Aid Overview, Schedule, & Documentation
- Governmental Relations

With some standard conferences not convening, an opportunity arose to reallocate funding toward a small group who could participate in the "Equity in Action: Fostering an Antiracist Culture" course produced by *Library Journal* & the *School Library Journal*. This specific training was chosen in response to the resurgence in social justice initiatives due to the events of 2020, and seven scholarships were awarded to library directors. Furthermore, knowing that librarianship has historically attracted caucasian women and lacks in race and ethnic, as well as other representational diversity, LVA also hosted a panel-presentation webinar focused on the retention of minority/under-represented populations in which presenters shared their experiences on how they have been retained in the profession. This webinar, which included attendees from across the United States, allowed participants to share resources for administrations, minority librarians, and others on proven retention strategies. This webinar included attendees from across the United States.

A consulting firm, Impact, LLC, was hired to collaborate with a committee of Virginia public library directors and staff to create a [disaster planning workbook](#) for completion by all Virginia public libraries, to anticipate and respond to future disasters. Multiple virtual meetings were held to review and edit drafts and culminated in virtual training for all library directors.

Upcoming projects include working with the Virginia Library Association to create a Trustees, Friends and Foundations (TFF) Forum; developing presentations for a TFF track at its annual conference; and developing traveling and virtual trainings for Friends of the Library, as well as a handbook.

Goal 3 Conclusion - Retrospective Question A-1

A-1. To what extent did LVA's Five-Year Plan activities make progress toward Goal 3?
The evaluators conclude that the Library of Virginia has **PARTLY ACHIEVED** Goal 3. The successful pivot and welcoming reception of all the additional professional opportunities offered through this relatively small LSTA investment supports the evaluators' judgment that this Goal is PARTLY ACHIEVED in the midst of adversity. Furthermore, with additional capacity through a new hire, this area is enjoying a renewed focus. Consulting on specialized face-to-face training for staff development/staff days continues to be a robust part of the LVA offerings, with topics including customer service excellence, marketing library services, and communications and change management.

Retrospective Assessment Questions A-2 and A-3

A-2. To what extent did LVA's Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents? The Virginia LSTA program addresses four of the six Measuring Success focal areas; primary among them are the Information Access and Institutional Capacity focal areas, with seven projects in each one of these categories. Two projects address the Lifelong Learning focal area and one project addresses the Human Resources focal area. All in

all, the projects that cover the Information Access focal area account for the largest portion of the LSTA allocation (see Appendix F for more information).

Six of the seven projects that cover the Information Access focal area (all Goal 2 projects) address the intent of improving users' ability to obtain and/or use information resources. Only one *(CHAE)* addresses the intent of Improving users' ability to discover information resources. Four of the seven projects under Institutional Capacity (all of them Goal 2 projects) serve the intent of Improving the library's physical and technological infrastructure. The two Goal 3 projects (*21st Century Work Skills* and *21st Century Library and Community Stakeholders*) serve the intent of improving the library workforce, and just one (Goal 2 *Public Library Data*) serves the intent of improving library operations. The two Lifelong Learning projects (*In School and Out of School Learning* from Goal 1 and *Document Bank of Virginia* from Goal 2) serve each one of the two intents under this focal area: (1) improve users' formal education for *In School and Out of School Learning*; and (2) improve users' general knowledge and skills for *Document Bank of Virginia*. The single Human Resources project (*School Readiness* from Goal 1) serves the intent to improve users' ability to apply information that furthers their parenting and family skills.

Overall, the LSTA program in the state of Virginia weighs in heavily on the side of information access but also has a healthy variety of additional focal areas and intents.

A-3. Did any of the following groups represent a substantial focus for LVA's Five-Year Plan activities? (Yes/No) (see Appendix G) Library Workforce represents a substantial focus for LVA during this cycle, based on the 10 percent (10%) expenditures threshold specified by IMLS in the evaluation guidelines. *FindItVirginia* and *Information Technology* are the two projects that meet the criterion of the 10 percent expenditure and serve primarily the Library Workforce. No other single project qualifies as being a substantial focus on the basis of the 10 percent expenditure specified by IMLS in the evaluation guidelines. However, in total, 10 of the 17 projects serve the library workforce, while the rest of the projects serve a healthy variety of other target populations, including families and children via the *In School and Out of School* and *School Readiness* projects.

Process Questions B-1, B-2, and B-3

B-1. How has LVA 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? The Library of Virginia makes use of a number of different data and approaches to monitor and evaluate progress toward the goals defined in the 5-year plan, including attendance numbers, usage statistics, quantitative/qualitative surveys, program reviews, and review of materials. While evaluation is intended to be continuous throughout the year, this may vary depending on the specific activity. Engagement with program participants and trainees is evaluated after each engagement to determine the need for adjustment or improvement. Online engagement (e.g., Transcribe) and databases are monitored through user access statistics and feedback.

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

Virginia's LSTA Five-Year Plan for 2018–2022 was not amended. No formal changes were made; however, reconfigurations were made at the project and activity levels (an example is the folding of Community Based Digital Projects and the Yearbook Project into *CHAE*). Some adjustments were due to the COVID-19 pandemic. Many events that had originally been scheduled as in-person meetings were adjusted to accommodate new realities and morphed to include virtual and hybrid models. Changes were particularly dramatic in regard to professional development activities, which experienced a year-to-year increase in participation as libraries sought to maximize the value of work-at-home time.

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

The Library of Virginia uses the SPR data in state government metrics reporting as well as in answering surveys by professional organizations like the ALA and SAA. There are also a variety of partnerships in which data is shared in support of early childhood literacy and school age reading and STEM programs, including the Virginia Department of Education, Science Museum of Virginia, Department of Conservation and Recreation, Virginia Head Start Advisory Group, and No Kid Hungry Virginia. LVA also coordinates with the Department of Housing & Community Development (DHCD) Telecommunications and Broadband Project, the Office of Governor Ralph S. Northam (Commonwealth Connect Coalition), and the Department of Education (Office of Technology) in support of public libraries and the development of the services that provide all users access to information through local, state, regional national and international electronic networks (*E-Rate*).

Library staff tasked to the *EROD* project work closely with the governor's counsel, deputy counsel, and chief of staff to plan for the management and transfer of the electronic records of the administration. This also includes technical staff from the Virginia Information Technologies Agency (VITA) assigned to the governor's office. The Library of Virginia and the Office of Data Governance and Analytics (formerly the Office of the Chief Data Officer) are partners in the management and oversight of the Virginia Open Data Portal. LVA staff work together with these units daily to develop and grow the portal. This involves meeting with other agencies and helping them add their data to the portal, including the Virginia Department of Health, the Department of General Services, the Virginia Department of Housing and Community Development, the Department of Rail & Public Transportation, Department of Elections, and many others. Data is also shared with the evaluators and the planners engaged in related LSTA processes.

Methodology Questions C-1, C-2, C-3, and C-4

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

As a result of a competitive bidding process, QualityMetrics LLC, a library consulting firm headquartered in Silver Spring, Maryland, was awarded the contract to conduct the independent LSTA evaluation. QualityMetrics LLC does not have a role in carrying out other LSTA-funded activities and is independent of those who are being evaluated or who might be favorably or adversely affected by the evaluation results. QualityMetrics LLC has experience at LVA, having also completed the LSTA evaluation for the FFY 2013–2017 cycle.

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.

QualityMetrics, LLC, deployed a multi-faceted and rigorous mixed methods protocol for data collection. Thorough reviews of demographic data, quantitative PLS data, and SPR data formed the basis of the evaluators' knowledge from the RFP response onward. During the initial interaction, QualityMetrics created a space for the LVA to deposit additional data and files and reflect on the program. After a series of Zoom calls (first with LVA representatives at the beginning of the evaluation process, and secondly, later in the process, to discuss whether goals had been achieved, partially achieved, or not achieved), the evaluators stayed in touch with the agency to resolve questions that emerged from the data collection and to solicit additional information. Data gathering included: (a) interviews with agency staff members; (b) interviews with project managers of various SPR-reported projects and activities; (c) focus group discussions with project teams; (d) focus group discussions with project and activity beneficiaries; and (e) responses to a broad-based short survey for library staff and stakeholders with some knowledge of and engagement with LSTA-funded activities. This survey primarily collected qualitative contextual information about past activities and future needs.

COVID-19 presented special circumstances for this evaluation, and a number of novel considerations had to be taken into account to complete this research. The pandemic, due to its travel restrictions and social distancing limitations, necessitated many changes in how the evaluation work was carried out and how the evaluators engaged policymakers, program managers.[15] QualityMetrics replaced face-to-face interviews with remote interviews and

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[15] OECD/DAC and IEO/UNDP (2020) Guidance Note: Good practices during COVID-19; UNICEF Evaluation Office (2020) Technical Note: Response of the UNICEF Evaluation Function to the COVID-19 Crisis; WFP Office of Evaluation (2020) Technical Note for {Planning and Conducting Evaluations During COVID-19; UNFPA Evaluation Office (2020) Adapting evaluations to the COVID-19 pandemic; UNDP Independent Evaluation Office (2020) Event planning and implementation during COVID-19; ILO Evaluation Office (2020) Implications of COVID-19 on evaluations in the ILO; FAO Office of Evaluations (2020) Risk analysis and guidance for the management and conduct of evaluations during international and national level COVID-190 crisis and restrictions.

desk-based methods, paying attention to: (a) maximizing use of technology; (b) securing engagement while reaching out to the most marginalized populations (small and rural libraries, and, in particular, users of talking books services); and (c) enhancing triangulation to validate remote data.[16]

A site visit was paid to the LVA during this evaluation period; it coincided with the annual meeting of the public library directors and provided the opportunity for in-person focus groups and short interviews. Dr. Martha Kyrillidou also visited the agency in 2016 as part of the FFY 2013–2017 LSTA evaluation cycle. Virtual (Zoom) one-on-one interviews were held with the agency chief and with key staff engaged in LSTA work and in specific projects carried out under the LSTA Five-Year Plan. The Five-Year Evaluation is a summative assessment, and as such, the availability of the SPR data was of critical importance.

Furthermore, the restrictions imposed by COVID-19 have strengthened the state library agency role. During this time of crisis, the state library was the source of answers for its communities and the whole profession. The SLAA responded to this need by holding frequent and regular statewide community meetings with various groups, elevating the importance of the LSTA activities even while they were being disrupted by the pandemic. Creative solutions were identified in most instances, as many programs had to turn to virtual delivery for most of the pandemic period. In some ways, the impact of recording virtual programming is more evident and more readily documented. However, evaluators did run the risk of minimizing the adverse effects of virtual programming on marginalized communities, which were often more difficult to reach during the COVID-19 crisis.

The toll on the mental health of Virginia communities has also been evident during the pandemic, as its restrictions have established new norms for in-person interaction. Student learning and well being have been precarious due to the disruption of the education life cycle.[17] However, opportunities to help students catch up with unfinished learning were plentiful, and state library agencies also augmented their database offerings to help homeschooled children and teens. In contrast, and due to the fact that community behaviors were frequently monitored during the pandemic, respondents felt overly surveyed in many instances.

A Web-based survey targeting the library community was conducted between November 30, 2021, and December 16, 2021 (see Appendix I). This survey provided considerable qualitative information, as well as some additional quantitative information. Additional corroborative evidence from comments collected in the survey served to triangulate the previously gathered evidence.

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[16] UNFPA Evaluation Office (2020) Adapting evaluations to the COVID-19 pandemic.
[17] The impact of the pandemic on K-12 learning loss has been documented approximately leaving students with five month of learning loss in math and four months of learning loss in reading; the effects are larger for historically disadvantaged students. See Sarah Mervosh, "The pandemic hurt these students the most." In print "Pandemic widened U.S. Educational Gap into a Gulf, Research Suggests." July 28, 2021, Section A, Page 13.

Validity and reliability analysis traditionally reflect a positivist worldview, and in a qualitative naturalistic approach, they are being redefined by some divergent views on whether and how one ensures quality and rigor in qualitative inquiry. The notion that naturalistic inquiry needs to exhibit quality, rigor, and trustworthiness has gained more traction nowadays. The quality and rigor of the phone interviews conducted by the evaluators in the LSTA evaluation of LVA has been enhanced by references to external Web site links, Google Maps, and internal triangulation. In some instances, interviewees have been asked to allow recording of the conversation (with assurances of confidentiality by the evaluators). At other times, two evaluators have attended focus groups or interviews. Shared note-taking was available in real time through shared access to Google Documents and Google Drive. This approach has allowed evaluators to refine their inquiry and tailor it as knowledge of LVA was refined from one interaction to the next. Recorded conversations also allowed the evaluators to reflect upon and modify their interpretations in a reliable manner. The validity of the inquiry was strengthened with the informed selection of the subjects by LVA's leadership team and staff.

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

Numerous small-group virtual sessions and telephone interviews were conducted with librarians and other persons with knowledge of LSTA-funded initiatives in Virginia. Oftentimes, these interactions were enhanced by virtual tours of their library buildings and physical facilities through Google Maps. One-on-one interviews were also conducted with consumers of the Library for the Blind and Print Disabled program.

The focus groups and interviews provided both qualitative evidence and context that supplemented a review of agency-supplied statistical data and information and data submitted in the form of the State Program Reports (SPRs).

Interviewees shared their knowledge of LSTA utilization, enhancing interactions and depth and quality of the conversations. Furthermore, principal investigators Martha Kyrillidou and Bill Wilson conducted both separate and joint interviews and group sessions and shared and discussed their observations in order to develop a shared understanding of the meaning of the library experience in Virginia and how it was supported by LVA with LSTA funding. Both investigators participated in many of the agency interviews, allowing for the concept of triangulation to be implemented as evaluators debriefed and compared interpretations and understandings.

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

LVA will share the key findings and recommendations both through electronic means and presentations to interested communities. The evaluation report will also be publicly available on the agency website.

APPENDIXES

Appendix A: Acronyms

ACS - American Community Survey
ARPA - American Recovery Plan Act
BARD - Braille and Audio Reading Download
CARES - Coronavirus Aid, Relief and Economic Security Act
CBDP - Community Based Digital Projects
CCC - Civilian Conservation Corps
CHAE - Cultural Heritage Access and Engagement
COP - Community of Practice
DBVa or DBANK - Document Bank of Virginia
DHCD - Department of Housing & Community Development
DPLA - Digital Public Library of America
EISi - Elementary/Secondary Information System
E-Rate - the schools and libraries universal service support program
EROD - Electronic Records and Open Data
EVLC - Evergreen Virginia Library Consortium
FFY - Federal Fiscal Year
FIVA - FindItVirginia (the online resources licensed for Virginia's public libraries)
FTE - Full Time Equivalent
GE - Genealogy Education
GRIVA - Genealogical Research Institute of Virginia
ILL - Interlibrary Loan
ITS - Information Technology Services
ILS - Integrated Library System
IMLS - Institute of Museum and Library Services
LLP - Lifelong Learning Program
LSTA - Library Services and Technology Act
NAAL - National Assessment of Adult Literacy
NCES - National Center for Educational Statistics
NP - Newspaper Project
OBE - Outcome-Based Evaluation
OCLC - Online Computer Library Center
OPAC - online public access catalog
POP - Patron Outreach Project
PLS - Public Library Statistics
ROI - return-on-investment
SAA - Society of American Archivists

SLAA - State Library Administrative Agency
SPR - State Program Report
STEAM - Science Technology Engineering Arts Mathematics
STEM - Science, Technology, Engineering, and Math
VITA - Virginia Information Technologies Agency
VODP - Virginia Open Data Portal

Appendix B: Interviewees/ Focus Groups

Interview	Stakeholder	Title	DATE
#1	Sandra G. Treadway	LVA, State Librarian	10/25/2021
#2	Cynthia Church	LVA, Continuing Education Consultant, Library of Virginia	11/9/2021
#3	Jennifer Cooper	School Libraries (meet with Keith Curry Lance)	11/11/2021
#4	Kim Armentrout	LVA, Grant and Data Coordinator, Library of Virginia	11/11/2021
#5	Susan LaParo	LVA, Children's and Youth Services Consultant, Library of Virginia	11/23/2021
#6	Reagen Thalacker	LVA, Public Library Consultant, Library of Virginia	11/24/2021
#7	Julie Short	Director, Lonesome Pine Regional Library	1/11/2022
#8	Jessica Diaz	Curriculum specialist, Richmond City Schools	1/12/2022
#9	Elizabeth Dzula	Youth Programs Manager, Heritage Public Library	1/27/2022

Focus Group	Stakeholders	Number of Participants	Date
#1	Library LSTA Evaluation Team	3	9/24/2021
#2	Library Development State Staff	7	9/9/2021
#3	Site Visit to Library Directors Meeting at LVA (3 round table discussions)	30	10/27/2021
#4	Virginia Evergreen Members	7	11/22/2021
#5	Library Directors	13	11/23/2021
#6	Virginia E-rate Central Staff	2	11/23/2021
#7	LVA LSTA CHAE Team	3	11/29/2021
#8	LVA LSTA EROD Team	3	11/30/2021
#9	VAASL Exec Council: Va Assoc of School Librarians	4	1/11/2022

Appendix C: Bibliography of Documents Reviewed

State Agency Sources

- SPR data (FFY 2018–2020)
- Stats Over Time (FFY 2018–2020)
- Agency website and social media
- LSTA Plan 2018–2022
- Disaster Planning Workbook:
  https://vpl.virginia.gov/library-directors-page/library-directors/#disaster
- Library Directors Resources:
  https://vpl.virginia.gov/library-directors-page/library-directors/
- Roger Christman and Dr. Anthea Seles discussed artificial intelligence as a part of the Council of State Archivists In Conversation With webinar series, focusing on the use of AI to process the Governor Robert McDonnell administration email. Recording here: https://connect.statearchivists.org/viewdocument/roger-christman-and-dr-anthea-sele
- A federation of datasets between the VDOP and the Norfolk City (Va) Open Data Portal: https://data.norfolk.gov/
- Virginia's Equity in Action and Equity at a Glance dashboards https://www.governor.virginia.gov/diversity/equity-dashboards/overview/
  - https://data.virginia.gov/browse?tags=equity%20dashboard
- Data dashboards for Governor Northam's Roadmap to End Hunger https://www.governor.virginia.gov/newsroom/all-releases/2020/october/headline-860937-en.html
  - The End Hunger dashboards are a joint effort between the several commonwealth agencies & the Federation of Virginia Food Banks. The LVA supports the ingestion and sustainability of the raw data in the Open Data Portal.
- The Library added datasets for 16 of the LVA collections https://data.virginia.gov/browse?q=library+of+virginia&sortBy=relevance&tags=library+of+virginia

Facebook:
    @LibraryofVA
    @educationLVA
    @VirginiaPublicLibraries
    Finding Your Virginia Roots (genealogy group, some crossover posts about LSTA projects)

Twitter:
    @LibraryofVA
    #LVAtranscribe
    #VaUntold
    @VaLibraries
    @educationLVA/

Social Media related to LSTA programs:
https://www.instagram.com/libraryofva/
https://edu.lva.virginia.gov/at-home-learning/
https://edu.lva.virginia.gov/civic-conversation-series/
https://edu.lva.virginia.gov/2020institute/
https://edu.lva.virginia.gov/wedemand/

Federal Government Publications

Federal Agency Data Sources

- Institute of Museum and Library Services, State Program Report (SPR) report
- Institute of Museum and Library Services, Public Library Statistics
- Institute of Museum and Library Services, State Profiles
- Institute of Museum and Library Services "Grants to States" Conference
- Institute of Museum and Library Services, State Library Administrative Agency Survey
- National Center for Education Statistics, Academic Libraries
- National Center for Education Statistics, Elementary and Secondary Information System
- United States Census Bureau, Decennial Census (April 1, 2020)

Evaluation Resources and COVID-19

- OECD/DAC and IEO/UNDP (2020) *Guidance Note: Good practices during COVID-19.*
- UNICEF Evaluation Office (2020) *Technical Note: Response of the UNICEF Evaluation Function to the COVID-19 Crisis.*
- WFP Office of Evaluation (2020) *Technical Note for Planning and Conducting Evaluations During COVID-19.*
- UNFPA Evaluation Office (2020) *Adapting evaluations to the COVID-19 pandemic.*
- UNDP Independent Evaluation Office (2020) *Event planning and implementation during COVID-19.*
- ILO Evaluation Office (2020) *Implications of COVID-19 on evaluations in the ILO.*
- FAO Office of Evaluations (2020) *Risk analysis and guidance for the management and conduct of evaluations during international and national level COVID-19 crisis and restrictions.*

Other Resources

- Ethel Himmel and William J. Wilson. The Functions and Roles of State Library Agencies. American Library Association, Chicago, 2000.
- The Institute of Museum and Library Services. 2021. Functions and Roles of State Libraries: 2000 and 2020. Washington, DC: Institute of Museum and Library Services.
- The Institute of Museum and Library Services. (2021). The Use and Cost of Public Library Materials: Trends Before the COVID-19 Pandemic. Washington, DC: The Institute.
- The Institute of Museum and Library Services. 2021. Understanding the Social Wellbeing Impacts of the Nation's Libraries and Museums. 2021 Report. Washington DC: Institute of Museum and Library Services.

- The Institute of Museum and Library Services. 2021. [Functions and Roles of State Libraries: 2000 and 2020.](#) Washington, DC: Institute of Museum and Library Services.
- Measures that Matter: [Workforce Development Literature Review](#), January 12, 2021.
- Pelczar, M., Frehill, L. M., Nielsen, E, Kaiser, A., Hudson, J., & Wan, T. (2021). [Characteristics of Public Libraries in the United States: Results from the FY 2019 Public Libraries Survey.](#) Institute of Museum and Library Services: Washington, D.C. Results from the SDC E-Resources Survey (received January 2022).
- Sarah Mervosh, "[The pandemic hurt these students the most](#)." In print "Pandemic widened U.S. Educational Gap into a Gulf, Research Suggests." *New York Times*, July 28, 2021, Section A, Page 13.
- The School Librarian Investigation: Decline or Evolution? https://libslide.org/

Appendix D: Focus Group Questions

Focus groups

General Questions

1. What stands out as being the most effective use of LSTA in Virginia over the last three years?
2. Are there specific examples of projects that you think were the most impactful on the lives of the citizens of Virginia?
3. Are there specific changes in how LSTA funds should be expended in the future? Are there new or emerging needs that are unmet that need to be addressed?

Potential Follow-up Questions

1. What type of programs work for library patrons and staff, in general?
2. What type of programs work for public library patrons, school and academic library clientele, and library staff specifically?
3. What do non-participating libraries and borderline participants need to be able to participate in, grant funded projects or statewide programs?
4. How will the library patrons and library staff be satisfied with the delivery of services?
5. What programs will result in cost savings for participating libraries?

Outcome Questions

1. Will more patrons use the library services because of the grant programs?
2. Will there be an increase in community involvement in relation to the grant programs?
3. Will customer service improve due to staff training from LSTA funded events?
4. Will the statewide programs enhance libraries' abilities to serve patrons?

Interview guidelines

1. Introductions (include that you are working for QualityMetrics, a library consulting firm headquartered in Silver Spring, Maryland, established in 2016). Ask them to tell you a bit about themselves.
2. Ask about their familiarity with the LSTA program. If they are unfamiliar you can provide some or all of the below info -
   a. *The Library Services and Technology Act's (LSTA) "Grants to States" program is the single largest source of ongoing federal funding for libraries. Many states spend funds on a combination of statewide initiatives and on subgrants awarded to individual libraries to enable them to launch innovative efforts or to extend services to populations that are difficult to reach.*
   b. *The LSTA program requires that each state conduct an evaluation of its LSTA program every five years. These evaluations are overseen by the Institute of*

Museum and Library Services but are conducted by independent evaluators. QualityMetrics was selected to conduct the state-level evaluations for nine states in the Northeast and our company is also working with more than a dozen additional states and territories. The results of our review are due to be submitted to IMLS in March of 2022.

3. FOR THOSE WHO DO NOT WORK FOR THE SLAA (who manage a project):
   a. Ask them to talk about the particular grant/s they worked with. Allow them to lead the conversation in an exploratory fashion. Ask follow up questions.
   b. Identify where there are materials or data from their projects that it would be useful for us to see.
4. FOR THOSE WHO DO NOT WORK FOR THE SLAA (high-level stakeholder):
   a. Go through the plan goal by goal, remind them of the goal wording and the percent of funds the state spent on it, get their reflections on progress toward each goal.
   b. Are there any future needs we should be emphasizing in the evaluation?
5. FOR SLAA STAFF on specific projects:
   a. Ask them to talk about the particular programs they are responsible for
   b. Let them know the data available (SPR, output, etc.) and verify that there is no other data or materials they have that would be helpful to us. If they only listed outputs in the SPR outcomes data, ask about plans for outcome data in the future.
   c. What do you see as the needs moving forward for the next seven years?
6. ALL: What impact have you seen LSTA dollars have on your state?
7. ALL: Is there anything you think we should have asked that we didn't?

Appendix E: Web-Survey Instrument

Virginia LSTA Survey 2021

WELCOME

Every five years, each state library administrative agency in the nation is required to conduct an independent evaluation of its implementation of the Library Services and Technology Act (LSTA) "Grants to States" program. This evaluation must be submitted in order to qualify for ongoing Federal funding.

Following close on the heels of the evaluation is the requirement for the submission of a new state-level five-year plan for the LSTA program. QualityMetrics, Library Consultants is assisting the Library of Virginia (LVA) with the evaluation.

QualityMetrics has been gathering information and data from a number of different sources including the State Program Report (SPR) that LVA submits annually to the Institute of Museum and Library Services (IMLS), internal statistical and narrative reports, survey data, and personal interviews with LVA staff as well as with representatives of the library community in the state. We'd like your help in assessing the impact of the LSTA program on your library and on the people that your library serves.

You are invited to share your thoughts and ideas by answering three short questions. The survey should take you no more than ten minutes to complete. The first question asks you to look back over the last few years and to consider how the LSTA program has benefitted libraries and library users. Second, we'd like to invite you to think about the future and to suggest new ways in which you think LSTA funds should be invested. Finally, we want to give you an opportunity to offer any other observations about Virginia's LSTA program (positive or negative). Thank you in advance for helping the Library of Virginia serve your community better!

BACKGROUND

Virginia receives approximately $3.9 million in LSTA Grants to States funding each year. This funding supports three major goals directed to public libraries and Virginians as a whole:

- Improved Access to Information
- Lifelong Learning & Civic Engagement
- Training & Development of Library Staff

Projects and programs these funds support include:

1. FindItVirginia databases
2. Genealogy Education
3. School Readiness, Summer Reading, Nature Backpacks and STEM kits
4. Bibliostat and state data management
5. 21st Century Work Skills training for library staff
6. Library Director, Trustee, Friends and Foundation Board Training and Consulting
7. Virginia Yearbooks Digital Collection
8. Making History: Transcribe
9. Virginia Newspaper Project
10. Virginia Open Data Portal
11. Document Bank of Virginia
12. Evergreen ILS and WordPress web site hosting

LSTA dollars are used to supplement state and local funds and to foster creativity and innovation in meeting the needs of Virginia's existing and potential library users and residents.

1) Which programs had an impact on your library and on the people your library serves?

	No impact	Somewhat impactful	Very impactful	Not applicable
FindItVirginia databases	( )	( )	( )	( )
Genealogy Education	( )	( )	( )	( )
School Readiness, Summer Reading, Nature Backpacks and STEM Kits	( )	( )	( )	( )

Bibliostat and state data management	( )	( )	( )	( )
21st Century Work Skills training for library staff	( )	( )	( )	( )
Library Director, Trustee, Friends and Foundation Board Training and Consulting	( )	( )	( )	( )
Virginia Yearbooks Digital Collection	( )	( )	( )	( )
Making History: Transcribe	( )	( )	( )	( )
Virginia Newspaper Project	( )	( )	( )	( )
Virginia Open Data Portal	( )	( )	( )	( )
Document Bank of Virginia	( )	( )	( )	( )

	No impact	Somewhat impactful	Very impactful	Not applicable
Evergreen ILS and WordPress web site hosting	( )	( )	( )	( )

2) Please select the level of impact these FindItVirginia databases and resources had on your library and/or on the people your library serves.

	No impact	Somewhat impactful	Very impactful	Not applicable
Accel5 (ARPA funded)	( )	( )	( )	( )
DayByDayVA	( )	( )	( )	( )
Digital Learn	( )	( )	( )	( )
WorldBook (Early Learning by WorldBook)	( )	( )	( )	( )
Entrepreneurial Learning Institute (ARPA funded)	( )	( )	( )	( )
Explora	( )	( )	( )	( )
Gale in Context: Elementary (Grades K-5)	( )	( )	( )	( )
Homework HelpNow (Brainfuse) (ARPA funded)	( )	( )	( )	( )

JobNow (Brainfuse) (ARPA funded)	( )	( )	( )	( )
JLG Digital (ARPA funded)	( )	( )	( )	( )
Just For Kids (ARPA funded)	( )	( )	( )	( )
Legal Forms	( )	( )	( )	( )
MasterFile Complete	( )	( )	( )	( )
NorthStar Digital Literacy	( )	( )	( )	( )
Novelist	( )	( )	( )	( )
Overdrive	( )	( )	( )	( )
Peterson's Career Prep	( )	( )	( )	( )
Read It!	( )	( )	( )	( )
Rocket Languages	( )	( )	( )	( )
Universal Class Access	( )	( )	( )	( )
VetNow	( )	( )	( )	( )

3) Think back over the past three years (2018, 2019, and 2020). Which, if any, of the LSTA-supported programs mentioned above have had the greatest impact on your library and on the people your library serves? How is the library service in your community better because of the investment of LSTA funds?

_____

_____

_____

_____

LOOKING FORWARD

4) Look ahead to the next five years (2023–2027). Are there changes in the way that LSTA dollars are invested that you think would significantly improve library services in Virginia? If so, what are they and why do you think that the change(s) would make a difference. *(Note that LSTA funding cannot be used for building facilities or for lobbying purposes.)*

_____

_____

_____

_____

OTHER COMMENTS

5) Please feel free to offer any additional comments about Virginia's LSTA program. What do you like or dislike about the program? What could be improved? *(Note that your responses are confidential and comments will not be identified with an individual or with a specific library.)*

_____

_____

_____

_____

OPTIONAL DEMOGRAPHIC QUESTIONS

6) The library that I represent is:

( ) A public library

( ) A school library

( ) An academic library

( ) A special library

( ) Other (Please specify below.)

If you responded "Other" to the question above, please specify the type of library you represent in the text box provided below.

_____

7) My role in the library that I represent is:

( ) Director

( ) Manager or Department Head

( ) Youth Services Librarian

( ) Adult Services Librarian

( ) Technical Services Librarian

( ) Technology Specialist

( ) Library Trustee

( ) Other (Please specify below.)

If you responded "Other" to the question above, please specify your role in the library you represent in the text box provided below.

_____

Thank You!

Thank you for taking our survey. Your response is very important to us.

Appendix F: Measuring Success Crosswalk Table

Goal 1	Foster the development of the evolving neighborhood/ community library as a center for lifelong learning and civic engagement.

Goal 2	Facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community.

Goal 3	Support the training and development of proactive library leadership and skilled staff to meet the rapidly changing environment.

VIRGINIA
Measuring Success Focal Areas and Intents

Focal Area / Intent	1.1 In School and Out of School	1.2 School Readiness	2.1 Find It Virginia	2.2 Information Technology Support	2.3 Electronic Records and Open Data (EROD)	2.4 Cultural Heritage Access and Engagement (CHAE)	2.5 Virginia Newspaper Project	2.6 Interlibrary Loan	2.7 Public Library Data	2.8 Genealogy Education	2.9 Lifelong Learning	2.10 Evergreen Virginia	2.11 WordPress	2.12 Document Bank of Virginia	2.13 E Rate	3.1 21st Century Work Skills	3.2 21st Century Library and Community Stakeholders
Lifelong Learning	YES											YES					
Improve users' formal education												YES					
Improve users' general knowledge and skills	YES																
Information Access			YES		YES	YES	YES	YES		YES	YES						
Improve users' ability to discover information resources					YES												
Improve users' ability to obtain and/or use information resources			YES			YES	YES	YES		YES	YES						
Institutional Capacity				YES					YES			YES	YES		YES	YES	YES
Improve the library workforce																YES	YES
Improve the library's physical and technological infrastructure				YES								YES	YES		YES		
Improve library operations									YES								
Economic & Employment Development																	
Improve users' ability to use resources and apply information for employment support																	
Improve users' ability to use and apply business resources																	
Human Services	YES																
Improve users' ability to apply information that furthers their personal, family or household finances																	
Improve users' ability to apply information that furthers their personal or family health & wellness																	
Improve users' ability to apply information that furthers their parenting and family skills	YES																
Civic Engagement																	
Improve users' ability to participate in their community																	
Improve users' ability to participate in community conversations around topics of concern																	

Appendix G: Targeted Audiences Crosswalk Table

VIRGINIA
Target Population Served

	Library Workforce (current and future)	Individuals Living Below the Poverty Line	Individuals who are unemployed/underemployed	Ethnic or Minority Populations	Immigrants/Refugees	Individuals with Disabilities	Individuals with Limited Functional Literacy or Information Skills	Families	Children (aged 0-5)	School-aged Youth (aged 6-17)	General (aged 18-64)	Senior (aged 65+)
1.1 In School and Out of School	YES	YES						YES	YES	YES		
1.2 School Readiness		YES		YES			YES	YES	YES			
2.1 Find It Virginia	YES											
2.2 Information Technology Support	YES											
2.3 Electronic Records and Open Data (ER	YES											
2.4 Cultural Heritage Access and Engagem												
2.5 Virginia Newspaper Project												
2.6 Interlibrary Loan												
2.7 Public Library Data	YES											
2.8 Genealogy Education				YES					YES	YES	YES	YES
2.9 Lifelong Learning												
2.10 Evergreen Virginia	YES											
2.11 WordPress	YES											
2.12 Document Bank of Virginia												
2.13 E Rate	YES											
3.1 21st Century Work Skills	YES											
3.2 21st Century Library and Community	YES											

Goal 1	Foster the development of the evolving neighborhood/ community library as a center for lifelong learning and civic engagement.

Goal 2	Facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community.

Goal 3	Support the training and development of proactive library leadership and skilled staff to meet the rapidly changing environment.

Appendix H: Expenditure Tables

VIRGINIA LSTA PROJECT EXPENDITURE SUMMARY

	State Goal Short Title	PROJECT TITLE/ Activities	FFY 2018	FFY 2019	FFY 2020	FFY 2018 LSTA EXPENDITURE	FFY 2019 LSTA EXPENDITURE	FFY 2020 LSTA EXPENDITURE	THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL	PERCENTAGE EXPENDITURE WITHIN GOAL	PERCENTAGE OF TOTAL LSTA EXPENDITURES
Goal 1	Foster the development of the evolving neighborhood/ community library as a center for lifelong learning and civic engagement.	In School and Out of School	X	X	X	$ 277,975.35	$ 52,522.29	$ 450,257.62	$ 780,755.26	60.17%	6.56%
		School Readiness	X	X	X	$ 91,956.01	$ 147,269.48	$ 277,641.26	$ 516,866.75	39.83%	4.34%
		GOAL SUBTOTAL				$ 369,931.36	$ 199,791.77	$ 727,898.88	$ 1,297,622.01	100.00%	10.91%
Goal 2	Facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community.	Find It Virginia	X	X	X	$2,260,574.95	$1,913,040.14	$1,764,967.08	$ 5,938,582.17	61.54%	49.91%
		Information Technology Support	X	X	X	$ 438,278.22	$ 410,163.66	$ 461,500.20	$ 1,309,942.08	13.57%	11.01%
		Electronic Records and Open Data (EROD)	X	X	X	$ 94,799.94	$ 535,353.22	$ 119,510.03	$ 749,663.19	7.77%	6.30%
		Cultural Heritage Access and Engagement (CHAE)	X	X	X	$ 129,807.15	$ 151,807.29	$ 133,643.65	$ 415,258.09	4.30%	3.49%
		Virginia Newspaper Project	X	X	X	$ 52,653.33	$ 115,617.28	$ 63,364.60	$ 231,635.21	2.40%	1.95%
		Interlibrary Loan	X	X	X	$ 80,808.91	$ 59,469.45	$ 85,438.50	$ 225,716.86	2.34%	1.90%
		Public Library Data	X	X	X	$ 42,537.14	$ 64,580.09	$ 85,866.88	$ 192,984.11	2.00%	1.62%
		Genealogy Education	X	X	X	$ 48,058.74	$ 62,001.16	$ 55,922.67	$ 165,982.57	1.72%	1.40%
		Lifelong Learning	X	X	X	$ 60,843.60	$ 56,043.75	$ 45,153.18	$ 162,040.53	1.68%	1.36%
		Evergreen Virginia	X	X	X	$ 25,332.36	$ 23,996.43	$ 53,068.54	$ 102,397.33	1.06%	0.86%
		WordPress	X	X	X	$ 35,337.23	$ 15,212.36	$ 40,775.36	$ 91,324.95	0.95%	0.77%
		Document Bank of Virginia	X	X	X	$ 5,560.28	$ 4,791.41	$ 24,493.89	$ 34,845.58	0.36%	0.29%
		E Rate	X	X	X	$ 13,219.92	$ 11,471.65	$ 4,739.62	$ 29,431.19	0.30%	0.25%
		GOAL SUBTOTAL				$3,287,811.77	$3,423,547.89	$2,938,444.20	$ 9,649,803.86	100.00%	81.11%
Goal 3	Support the training and development of proactive library leadership and skilled staff to meet the rapidly changing environment.	21st Century Work Skills	X	X	X	$ 147,902.49	$ 165,024.55	$ 142,133.62	$ 455,060.66	69.66%	3.82%
		21st Century Library and Community Stakeholders		X	X	$ -	$ 66,325.33	$ 131,854.00	$ 198,179.33	30.34%	1.67%
		GOAL SUBTOTAL				$ 147,902.49	$ 231,349.88	$ 273,987.62	$ 653,239.99	100.00%	5.49%
		LSTA PROGRAM ADMINISTRATION				$ 89,216.38	$ 103,385.46	$ 104,444.30	$ 297,046.14	100.00%	2.50%
		GRAND TOTAL				$3,894,862.00	$3,958,075.00	$4,044,775.00	$ 11,897,712.00		
		ALLOCATION				$3,894,862.00	$3,958,075.00	$4,044,775.00			

Appendix I: Web-Survey Reports

VA LSTA Survey Summary

https://reporting.alchemer.com/r/71852_61a666c8de6fe9.67622743

Findings

The survey received 202 responses, 79 of which were complete. As shown in Figure 1, 69.6% (55) of 79 respondents work in public libraries; 29.1% (23) of respondents indicated they worked in a school library; and 1.3% (1) of respondents indicated "other," stating they were a retired librarian with special and school library experience.

Figure 2 shows that 34.6% (27) of respondents were library directors; 23.1% (18) of respondents were managers or department heads; 14.1% (11) of respondents were Youth Services Librarians; 1.3% (1) of respondents were Adult Services Librarians; 6.4% (5) were Technical Services Librarians; 1.3% (1) aTechnology Specialists; and 19.2% (15) of respondents indicated "Other." Those respondents that answered "Other" included school librarians, library associates, and circulation technicians.

Figure 1. The Type of Library in Which Respondents Work
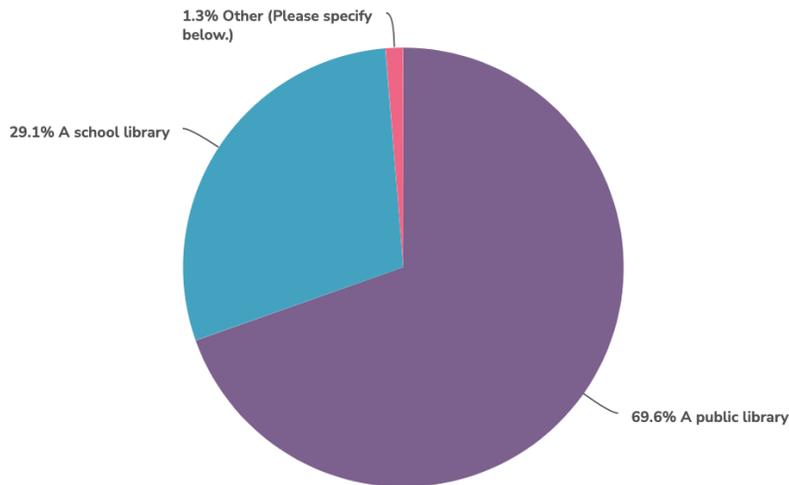
Figure 2. Role of the Respondents Within Their Libraries
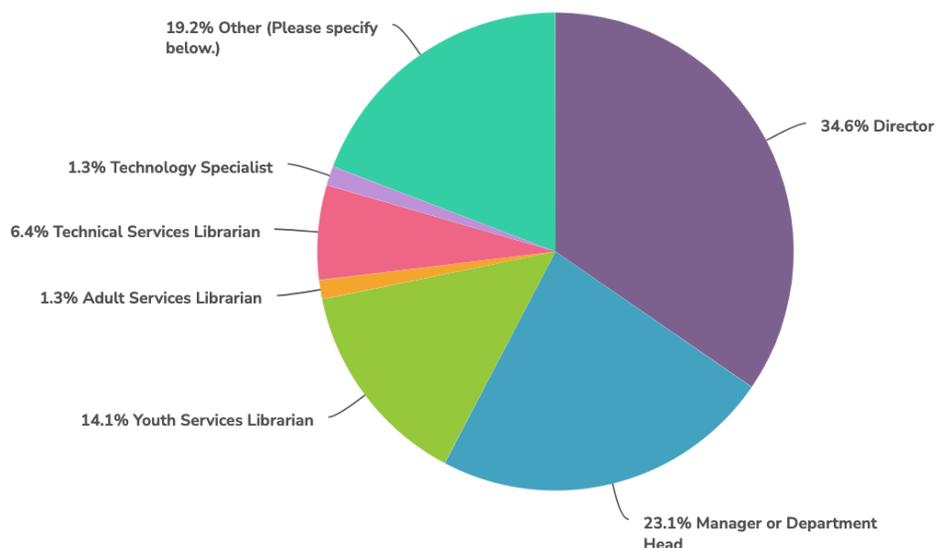
Program Impact

The first question asked respondents to indicate the degree to which certain programs impacted the patrons of their libraries. Respondents were asked to choose the level of impact from no impact, somewhat impactful, very impactful, and not applicable. Programs that were marked as "very impactful" by at least 50% of respondents include:

- *FindItVirginia* databases (60.7%)
- *School Readiness*, *Summer Reading*, *Nature Backpacks,* and *STEM Kits* (69.0%)

The program indicated to have no impact by respondents was the *Making History: Transcribe* program, with 33.3% of respondents indicating it had no impact. Programs that were rated as "somewhat impactful" by respondents include: *Genealogy Education* (39.8%), *21st Century Work Skills* training for library staff (43.2%), *Virginia Yearbooks Digital Collection* (37.5%), and the *Virginia Open Data Portal* (37.8%). A complete breakdown of programs and their ratings can be found in Figure 3.

Figure 3. Impact of Library Programs

	No impact	Somewhat impactful	Very impactful	Not applicable
FindIt Virginia databases Count Row %	1 1.2%	31 36.9%	51 60.7%	1 1.2%
Genealogy Education Count Row %	18 21.7%	33 39.8%	20 24.1%	12 14.5%
School Readiness, Summer Reading, Nature Backpacks and STEM Kits Count Row %	3 3.6%	20 23.8%	58 69.0%	3 3.6%
Bibliostat and state data management Count Row %	12 15.2%	26 32.9%	31 39.2%	10 12.7%
21st Century Work Sills training for library staff Count Row %	12 14.8%	35 43.2%	21 25.9%	13 16.0%
Library Director, Trustee, Friends and Foundation Board Training and Consulting Count Row %	12 15.0%	23 28.8%	25 31.3%	20 25.0%
Virginia Yearbooks Digital Collection Count Row %	18 22.5%	30 37.5%	15 18.8%	17 21.3%
Making History: Transcribe Count Row %	27 33.3%	25 30.9%	6 7.4%	23 28.4%
Virginia Newspaper Project Count Row %	21 25.0%	29 34.5%	19 22.6%	15 17.9%
Virginia Open Data Portal Count Row %	20 24.4%	31 37.8%	8 9.8%	23 28.0%
Document Bank of Virginia Count Row %	21 26.3%	27 33.8%	10 12.5%	22 27.5%
Evergreen ILS and WordPress web site hosting Count Row %	23 28.0%	7 8.5%	20 24.4%	32 39.0%

Participants were then asked to rate the level of impact that a list of FindIt Virginia databases and resources had on their libraries and their patrons. Participants were asked to select no impact, somewhat impactful, very impactful, or not applicable. This question received 83 responses. *Overdrive* had the highest percentage of respondents (74.7%) indicating that it was "very impactful". *Rocket Languages* (56.6%), *Read It!* (51.3%), *Explora* (50.6%), and *JLG Digital* (50.6%) had the highest "somewhat impactful" ratings. Figure 4 shows the complete list of database and resource ratings.

Figure 4. FindItVirginia Database and Resource Impact

|	No impact	Somewhat impactful	Very impactful	Not applicable
Accel5 (ARPA funded)				
Count	25	25	4	26
Row %	31.3%	31.3%	5.0%	32.5%
DayByDayVA				
Count	24	25	3	28
Row %	30.0%	31.3%	3.8%	35.0%
Digital Learn				
Count	25	25	5	23
Row %	32.1%	32.1%	6.4%	29.5%
WorldBook (Early Learning by WorldBook)				
Count	8	40	28	7
Row %	9.6%	48.2%	33.7%	8.4%
Entrepreneurial Learning Institute (ARPA funded)				
Count	24	26	5	26
Row %	29.6%	32.1%	6.2%	32.1%
Explora				
Count	11	41	18	11
Row %	13.6%	50.6%	22.2%	13.6%
Gale in Context: Elementary (Grades K-5)				
Count	12	39	26	5
Row %	14.6%	47.6%	31.7%	6.1%
Homework HelpNow (Brainfuse) (ARPA funded)				
Count	14	34	22	11
Row %	17.3%	42.0%	27.2%	13.6%
JobNow (Brainfuse) (ARPA funded)				
Count	17	33	16	17
Row %	20.5%	39.8%	19.3%	20.5%
JLG Digital (ARPA funded)				
Count	12	41	11	17
Row %	14.8%	50.6%	13.6%	21.0%
Just For Kids (ARPA funded)				
Count	11	38	18	14
Row %	13.6%	46.9%	22.2%	17.3%
Legal Forms				
Count	11	26	32	13
Row %	13.4%	31.7%	39.0%	15.9%
MasterFile Complete				
Count	14	32	15	20
Row %	17.3%	39.5%	18.5%	24.7%
NorthStar Digital Literacy				
Count	30	17	3	27
Row %	39.0%	22.1%	3.9%	35.1%
Novelist				
Count	7	24	42	10
Row %	8.4%	28.9%	50.6%	12.0%
Overdrive				
Count	1	13	62	7
Row %	1.2%	15.7%	74.7%	8.4%
Peterson's Career Prep				
Count	15	29	24	14
Row %	18.3%	35.4%	29.3%	17.1%
Read It!				
Count	18	41	9	12
Row %	22.5%	51.3%	11.3%	15.0%
Rocket Languages				
Count	14	47	12	10
Row %	16.9%	56.6%	14.5%	12.0%
Universal Class Access				
Count	11	26	29	15
Row %	13.6%	32.1%	35.8%	18.5%
VetNow				
Count	22	32	9	18
Row %	27.2%	39.5%	11.1%	22.2%

Looking Back

The third question asked respondents to think back over the past three years and discuss which LSTA-supported programs had the greatest impact on the library and the people the library serves. Major themes found in the comments from this question can be found in Figure 5 below. This question received 61 responses. By far, the most discussed area of expenditures was database access and digital services like *FindItVirginia*, *The Legal Forms*, *Universal Class*, *Overdrive,* and *Novelist*. As shown in Figure 5, 90.1% of respondents (55) indicated that these services were the most impactful. One (1.6%) respondent indicated that professional development opportunities have been impactful, and three (4.9%) respondents indicated that library programs such as the *Summer Reading Program* and the *Nature Backpack* program were impactful.

Figure 5. Major Themes Discussed in Respondent Comments.
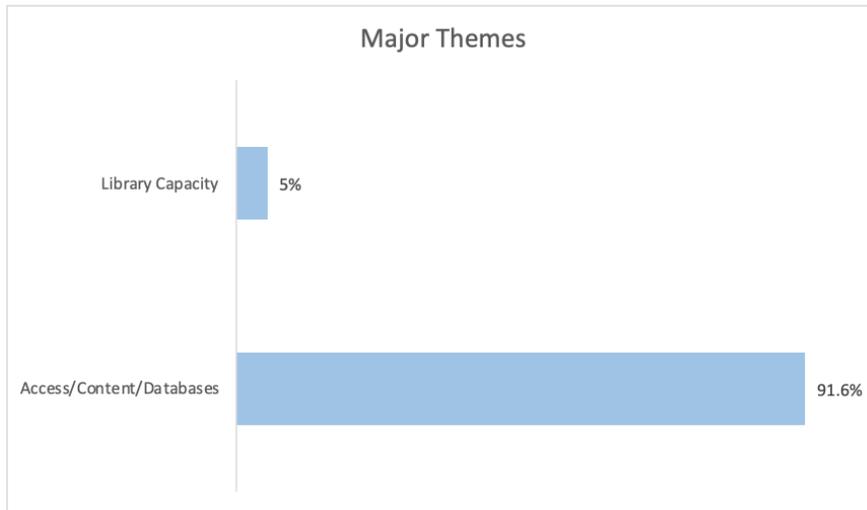
Figure 5. Impactful programs in the last three years.
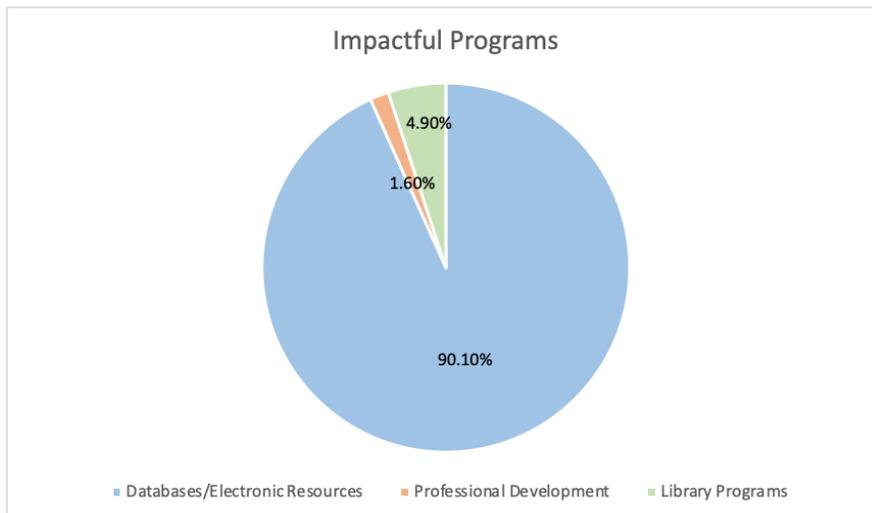
Below are a selection of comments about these beneficial programs.

The EBSCO *resources,* Novelist Plus *and* Masterfile, *get lots of use at the library, and were particularly valuable during the pandemic when access to online content was essential for students as well as lifelong learners. Similarly, the* Overdrive *(formerly* RBDigital*) magazine content has proven incredibly popular with users here. Having a robust digital collection, supported in part by LVA, prior to March 2020 positioned our library to be able to quickly and effectively respond to the closing of facilities and schools during the pandemic's early stages. This was a great example of how building capacity allows for nimble response during crisis situations.*

Unfortunately during COVID (2019–2020) few of the resources were utilized with the exception of Overdrive/Libby. *That resource had the greatest increase in usage. Any digital resource for our area has limited usage due to connectivity issues. Also we have not found the best way to market the resources. Having said that...the online resources that hit elementary school age, helped to prep for jobs or find jobs have had the biggest usage.* Universal *classes have helped several in our community to gain better computer skills.* Novelist *has been a great help to our staff to give suggestions for reading materials.* Genealogy *also has periodic interest.* VetNow, JobNow *are too new for us to determine the level of impact. Staff find the resources useful. For direct, face to face contact the resources have been useful.*

We are incredibly grateful to LVA for providing access to additional eResources through OverDrive/Libby - *particularly magazines. eBorrowing resources are particularly expensive (with costs always increasing it seems) and it always seems like even when we increase our budget for eResources we seem to meet or exceed that budget line fairly quickly. It's great to have additional help with eResources from the State Library.*

I have had many patrons tell us they don't know what they would have done during the pandemic without the ability to download electronic books and audiobooks. I think Overdrive *and* Universal Class *are two of the most used resources as well as all things* Genealogy. *These resources are invaluable. As for the* BrainFuse *products since we just got them I cannot speak to their impact but I know they are incredibly valuable resources and I think we will see a lot of use out of them in the coming year.*

Overdrive *and* Universal Class *have been very helpful in our library. The* Universal Class *is especially helpful because our library is a small, rural library with limited access to training and internet resources.*

*Encyclopedias and general online reference resources (*MasterFile, Explora, *etc.) and self-improvement resources like* Universal Class *do well for us. Patrons loved having access to the* Overdrive *magazines. Also, staff often use* Novelist Plus *for RA. These are all great resources.*

Legal Forms *has been suggested to and used by our patrons a LOT - this has been a game changer in providing assistance for patrons looking for legal resources.* Novelist *has opened up a new world of reader's advisory.*

Looking Forward

Respondents were asked to think ahead to the years covered by the upcoming Five-Year Plan (fiscal years 2023–2027) and discuss changes in the way that LSTA dollars are invested that would significantly improve library services. We received 55 responses to this question. Some areas in which multiple recommendations were made include continuing access to databases and state-wide resource sharing, professional development for library staff, marketing of library programs and services.

Other suggestions include:
- A partnership between school and public libraries
- Technology updates
- WiFi hotspot services
- More support for rural areas

Other Comments

Respondents were asked to provide any additional comments regarding Virginia's LSTA program. This question received 31 responses. 15 of these responses were thank-yous or indicating that they had no additional comments to provide. Comments other than general thank-yous are provided below.

> *Most of my issues have been stated. Marketing and training. We have great resources and limited ability to promote. It would be nice if local library cards were able to be used for access. Or if libraries could get a card for staff to use for general reference resources inside the buildings. Not sure if these resources are still limited, they were a while ago or if they are even LSTA funded.* Backpacks*, our state park passes have expired. We need a way to have new passes or an option to purchase long-term passes on our own. A current complaint from patrons.* Backpacks *have been popular and I hope they continue,a no-tech option that has a lot of popularity with our families.*

> *Instead of library-centric databases, I'd like to see more products that the consumers are looking for. For example,* Rosetta Stone *instead of* Rocket Languages *or* Coursera *and* Craftsy *instead of* Universal Class*. I know it's hard and not all companies will work with libraries, but most library-centric products are low quality and difficult to use, never mind the challenge of getting people to use something they've not heard of before.*

> *I think the databases LSTA program is great in helping to equalize what the different libraries throughout the Commonwealth can provide for their patrons, but having the equipment to access it is just as important.*

The shift from Gale *databases to* EBSCO *databases wiped out our patrons' usage of these 'encyclopedia' sort of databases. Consistency of databases seems very important as it is hard to get patrons used to using them and so new databases take a long time to get off the ground.*

LSTA is critical to our operation. We use the majority of the grant funding to pay for our collection in various formats. We could not offer appropriate and relevant resources without that support. I appreciate the consultations that LVA does with us about the direction of the program and that they act on our recommendations and requests. I think they are at their best as sherpas of various areas of expertise. I think they are less successful when they take on project implementation responsibilities like the backpacks. LNDS website improvements are also much appreciated. Refer to the site pretty regularly and it's getting easier to use. Like all federal programs, bureaucracy grows constantly. I would encourage a hard look at the many questions in the Bibliostat *questionnaire. It seems more get added but few subtracted. Is every element still useful or have some outlived their useful lifespan? I know this is not specific to Virginia but required for every state.*

While having the multitude and variety of products available is great it is also overwhelming. So many products to track, promote, learn, and train on top of the products individual library's invest in is just more than we have capacity to promote/share/utilize with the public effectively.

VA WordPress Survey Summary

Findings

This survey received a total of 11 responses. The purpose of this survey was to gauge the user satisfaction of the Virginia WordPress tool. The first question asked respondents to indicate whether they are used to using the old or new WordPress tool. Figure 1 below shows the breakdown of responses. One respondent (9.0%) indicated that they are used to using the old Wordpress tool. Two respondents (18.1%) indicated that they are used to using the new Wordpress tool and 8 respondents (72.7%) indicated that they were not sure which version of the Wordpress tool they were used to using.

Figure 1. Old Versus New WordPress Tool Use
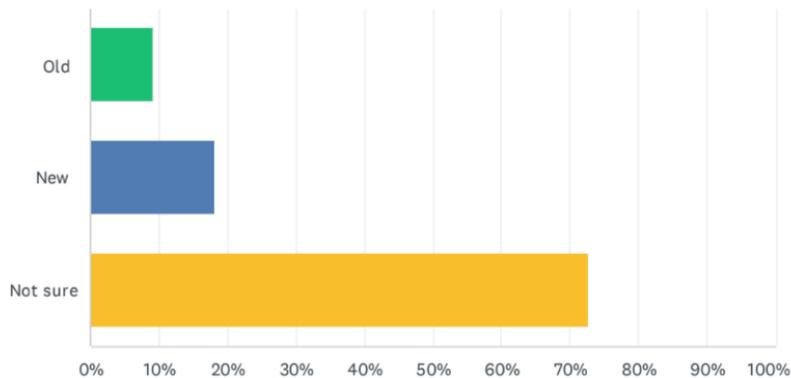
The second question asked respondents how satisfied they are overall with the Library of Virginia WordPress tool they are using. Respondents were asked to choose from very satisfied, somewhat satisfied, neutral, somewhat dissatisfied, and very dissatisfied. As shown in Figure 2 b, 45.5% of respondents (5) indicated that they are very satisfied with the VA WordPress tool, 36.3% of respondents (4) indicated that they are somewhat satisfied with the VA WordPress tool, and 18.1% of respondents (2) indicated that they are neutral about their satisfaction with the VA WordPress tool.

Figure 2. Satisfaction with VA WordPress Tool
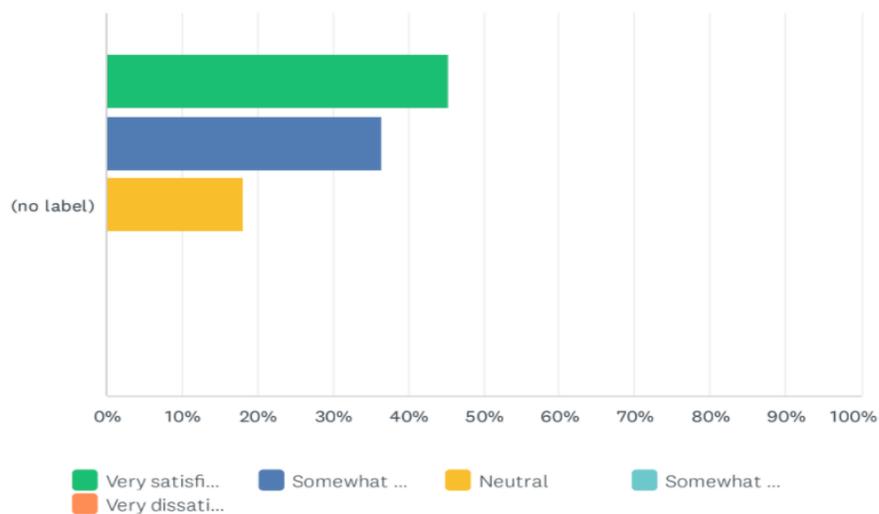
Respondents were then asked to rate their satisfaction within specific areas of the WordPress tool. These areas include ease of creating new pages, ease of editing existing content, range of available features, reliability, support, and content and accessibility checker. Overall, 72.7% of respondents (8) were very satisfied with the ease of creating new pages and 63.6% of respondents (7) were very satisfied with the reliability of the WordPress tool. Figure 3 shows the breakdown of each area of the WordPress tool.

Figure 3. Satisfaction with Specific Areas of the WordPress Tool

	VERY SATISFIED	SOMEWHAT SATISFIED	NEUTRAL	SOMEWHAT DISSATISFIED	VERY DISSATISFIED	NOT FAMILIAR WITH THIS
Ease of creating new pages	72.73% 8	18.18% 2	9.09% 1	0.00% 0	0.00% 0	0.00% 0
Ease of editing existing content	45.45% 5	45.45% 5	0.00% 0	9.09% 1	0.00% 0	0.00% 0
Range of available features	18.18% 2	54.55% 6	9.09% 1	18.18% 2	0.00% 0	0.00% 0
Reliability	63.64% 7	27.27% 3	9.09% 1	0.00% 0	0.00% 0	0.00% 0
Support	27.27% 3	45.45% 5	18.18% 2	9.09% 1	0.00% 0	0.00% 0
Siteimprove content and accessibility checker	9.09% 1	18.18% 2	27.27% 3	9.09% 1	9.09% 1	27.27% 3

Below are three comments from respondents who indicated that they are somewhat or very dissatisfied with the WordPresstool:

> *The site can be a bit clunky to edit. Admittedly this could also be due to user error, as well as attempting to learn a tool that predecessors did not.*

> *It is not user friendly.*

> *The limitations to widgets/plugins/templates that are available on a regular Wordpress admin site can be frustrating at times. We either have to deal with the page templates that were originally set up for us, or staff would have to learn advanced CSS editing.*

The fifth question asked respondents to rank which features of the WordPress site that are the most important to them. Respondents had to rank six features, including general content pages, image galleries, site search, online forms, event calendars, and book carousels. General content pages ranked the highest, with six respondents ranking it the highest. Event calendars were ranked the second most important. Figure 4 shows the complete rankings of important features of the WordPress site.

Figure 4. Importance of Wordpress Site Features
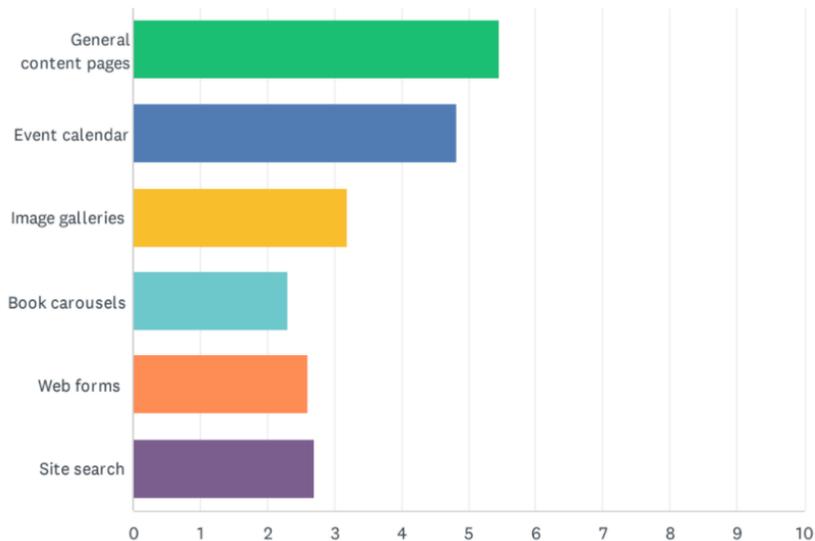
Respondents were then asked to indicate any new features they would like to see for the Wordpress site. This question received eight responses. Recommendations for new features mentioned more than once included more flexibility to personalize the site for each library (2) and mobile device use optimization (2). One respondent indicated that there were no specific features they would like to see and another respondent indicated that they are very happy with the pilot of the new template. Two respondents offered unique feature comments:

> When we updated our site to the new WordPress tools, we opted to pay for a separate event calendar subscription as well as Wowbrary, which allowed us to add a "book river." Those were the two biggest features we were lacking, but the investment in those was possible because the rest of our site is free to us (except for staff time).

> With the pandemic impacting a shift to virtual programming and in-person program occupancy limits, we had to go to an outside vendor for a new event calendar/event registration platform because the default event calendar that came with our WordPress site (and any free widgets that we could easily add to it and use) weren't going to be able to do what we needed. It would be nice if LVA also looked into adding/funding a WordPress event calendar that featured customizable event registration and event registration notification emails.

Respondents were next asked to share any information or stores on how the WordPress site has supported their library and its users. Below are the five responses received on this question.

> I have received feedback that the website is easy to navigate.

> We absolutely love the upgraded WordPress tools. I enjoy having control over our site to add whatever we need. We don't depend on a webmaster or our local government entities to provide web space for us, which is a real gift and gives us the freedom we need to provide

information in a timely manner. With our new upgraded website, I am very pleased with LVA's WordPress service and I think our website quality rivals any library's.

The huge slider has been helpful with displaying current information that we would like to prominently promote library events.

It's invaluable to have a web presence these days. we couldn't do business without it!

Because it is quick and easy to edit we can respond quickly such as adding information about distributing COVID tests onto the site in about 20 minutes of time. Easy to communicate last minute closures such as for power outages to customers. Reliable platform that very rarely crashes so customers can always get information and access to our digital resources

Appendix J: Databases in Virginia

Prepared by Galadriel Chilton, Director of Collection Initiatives, Ivy Plus Libraries Confederation

Background

Statewide database programs are a crucial service supported at various levels by the vast majority of state library programs across the United States.[18] Meeting user needs in virtual as well as physical spaces is a critical component of state library services. Even as physical visits and circulation decline at public libraries (a trend likely to be further exacerbated by the COVID-19 pandemic), both the usage and availability of electronic resources has expanded.[19]

To understand the snapshot of the database resources and programs provided by the state agency, it is important to note that funding models for statewide databases have shifted considerably in the last few decades. For example, between 2000 and 2020, state libraries' overall spending on statewide database licensing increased from 42.29 million to 74.04 million dollars (spent by 48 state libraries). Within this increase, however, state libraries were very unlikely to be the sole source of support for statewide databases; in fact, in 2020 89.6 percent of statewide database licensing was carried out by multiple entities and funding sources.[20] In an informal 2021 survey of state data coordinators, it was found that although the majority of states offer support for a statewide databases program (41 of 44 respondents), many of those are not managed through the state library (only 33 reported state library management). Thirty-six of these respondents also noted the existence of a local e-resource consortium in the state.

Often these statewide database programs are supported in part through LSTA funding, as well as state funding, library cost-shares, grants, and external, but often complementary, consortial programs.[21] Each statewide database program is approached, funded, and supported in slightly different ways. The following snapshots note where LSTA funds have likely supported a particular resource or platform to some extent, but they do not note what other funding or percentage of support this comprises, as this information is beyond the scope of the LSTA evaluation.

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[18] The Institute of Museum and Library Services. 2021. Functions and Roles of State Libraries: 2000 and 2020. Washington, DC: The Institute of Museum and Library Services, p.14.; Results from the SDC E-Resources Survey.

[19] The Institute of Museum and Library Services. (2021). *The Use and Cost of Public Library Materials: Trends Before the COVID-19 Pandemic.* Washington, DC: The Institute, p. 6.

[20] The Institute of Museum and Library Services. 2021. Functions and Roles of State Libraries: 2000 and 2020. Washington, DC: The Institute of Museum and Library Services, p.14.; Results from the SDC E-Resources Survey, p.14.

[21] Results from the 2021 SDC E-Resources Survey

State: Virginia

Project details/URLs:
- 2019: https://imls-spr.imls.gov/Public/Details/81891
- LSTA Funding: $1,913,040.14
- https://finditva.com/index/
- In FFY 2018, FFY 2019, and FFY 2020 $ 5,938,582.17 was spent on database resources for FindItVirginia (FIVA), comprising 49.96% of total LSTA expenditures.

1. Table of Resources

Via https://finditva.com/index/

*Note: Databases in **red** are only available via finditva.com and <u>not</u> listed on the A-Z list from lva.virginia.gov.*

Vendor/Provider	Resource	Vendor/Provider	Resource
EBSCO	**Accel5**	**InfoBase**	**Just For Kids**
Library of Virginia	**DayByDayVA (English & Spanish)**	Gale Cengage	Legal Forms
Public Library Association	**Digital Learn**	EBSCO	MasterFile Complete
WorldBook	**Early Learning by WorldBook**	**NorthStar**	**NorthStar Digital Literacy**
Ebsco	**Entrepreneurial Learning Institute**	**EBSCO**	**NoveList K-8 Plus**
EBSCO	**Explora High School (Grades 9-12)**	EBSCO	NoveList Plus
EBSCO	**Explora Middle School (Grades 6-8)**	OverDrive	OverDrive
EBSCO	**Explora Public Libraries**	Gale Cengage	Peterson's Career Prep
Gale Cengage	**Gale in Context: Elementary (Grades K-5)**	EBSCO	Read It!
Brainfuse	**Homework HelpNow**	**Libros Media Ltd**	**Rocket Languages**
Brainfuse	**JobNow**	Universal Class, Inc.	Universal Class Access

Junior Library Guild	JLG Digital	Brainfuse	VetNow

Via lva-virginia.libguides.com/az.php

Notes:
- *Databases in **blue** are only available via lva.virginia.gov and <u>not</u> listed on finditva.com.*

Vendor/Provider	Resource	Vendor/Provider	Resource
NewsBank	**America's News**	**Gale Cengage**	**Mountain People: Life and Culture in Appalachia**
Alexander Street Press (A ProQuest Company)	**American Civil War**	**Newspaper Archive**	**Newspaper Archive**
University of Virginia Press/Rotunda	**American History Collection (Includes 8 Sub-Collections)**	**LexisNexis**	**Nexis Uni**
ProQuest	**American Periodicals**	EBSCO	Novelist Plus
Ancestry.com	**Ancestry for Virginians**	OverDrive, Inc.	OverDrive
Ancestry.com	**Ancestry Institution**	**Oxford University Press**	**Oxford English Dictionary**
OldMaps.com	**Antique Map Price Record**	**Oxford University Press**	**Oxford Reference Online**
OCLC	**ArticleFirst**	**Oxford University Press**	**Oxford Scholarship Online**
Gale Cengage	**Biography and Genealogy Master Index**	Peterson's	Peterson's Career Prep
Bowker	**Books In Print**	**ProQuest**	**Civil War Era**
HeinOnline	**Civil Rights and Social Justice**	**ProQuest**	**Congressional Publications**
Gale Cengage	**Civil War in Words and Deeds**	**ProQuest**	**ProQuest Historical Newspapers: Black Newspaper Collection**

Data Axle	**Reference Solutions**	**ProQuest**	**ProQuest Historical Newspapers: The Washington Post (1877-2004)**
ProQuest	**Digital Sanborn Maps**	**ProQuest**	**Slavery in Antebellum Southern Industries (1700-1896)**
The Church of Jesus Christ of Latter-day Saints	**FamilySearch**	**ProQuest**	**Southern Life and African American History (1775-1915; Parts 1 and 2)**
Historical Information Gatherers	**FIMo (Fire Insurance Maps Online)**	**ProQuest**	**Recent Newspapers: US Southeast Collection**
Ancestry.com	**Fold3 Library Edition**	**ProQuest**	**Recent Newspapers: The Washington Post (2008 – Present)**
Gale Cengage	Legal Forms	EBSCO	Read It!
HarpWeek	**HarpWeek**	**HeinOnline**	**Slavery in America and the World: History, Culture & Law**
ProQuest	**Historic Map Works Library Edition**	**Social Explorer**	**Social Explorer**
ITHAKA	**JSTOR**	Universal Class	Universal Class
EBSCO	MasterFILE Complete	**OCLC**	**WorldCat**
FTSE Russell	**Mergent Online**	*OCLC*	*WorldCat.org*

2. Access/Scope/Population:

Access to statewide database resources is provided through finditva.com as well as lva.virginia.gov. Online resources include reference and learning resources geared toward both adult and juvenile populations as well as full-text periodical and e-book/audio book resources covering career and homework help, legal forms, world languages, literature and reading, and digital literacy tools. Via lva.virginia.gov, residents have access to many U.S. history resources focusing on the American Revolution and the Civil War as well as genealogy resources.

All Virginia residents – 8.631 million as of 2019 (US Census) – may use these resources, which serve pre-k (5.9% of the population), children under 18 years old(21.8% of the population), and adults over 18 years old (78.2% of the population).

Online resources include educational, academic, as well as population-specific help (e.g. support for job seekers as well as veterans and military families). In addition to paying for subscriptions from vendors and publishers (e.g., EBSCO, Gale Cengage, etc.), the Library of

Virginia also uses IMLS funding to create and maintain DaybyDayVA which is "a family activity calendar with new suggestions every day for stories, songs, activities, and games!" DaybyDayVa is available in English and Spanish. Access is available through library IP from Virigina's public K-12 schools and libraries or via login using a public library card.

3. URLs:

Virginia-DBs spreadsheet constructed.

4. URLs usage:

Summary Usage Statistics provided by the SLAA.

Product availability as well as usage statistics underwent a transformative process during the last three years. Counter 5 compliant statistics were introduced in some products in 2019 but other product lines are not providing such statistics; furthermore, products like Overdrive that rely on checkouts are different in nature than Counter 5 compliant statistics of usage. Given these variations, we present here all four tables provided by the state library for the period we are examining, one for each year for 2018, 2019, 2020, and 2021 with explanations on the Counter 5 standard compliance.

2018 Resources	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Boopsie Users	1,888	1,777	1,940	1,860	1,670	1,740	2,275	2,151	5,607				20,908
Boopsie Activity	12,440	10,840	15,130	11,900	10,740	10,520	21,062	19,043	258,253				369,928
Credo Homework Help sessions	352	301	300	253	149	86	31	93	317				1,882
Credo Literati	1,876	2,428	1,863	3,309	1,696	635	410	807	1,483				14,507
eLibrary	5,094	5,691	4,344	4,822	3,247	2,322	410	807	1,483				28,220
eLibrary K-12	60,532	70,656	55,709	58,497	38,251	9,529	1,447	2,782	21,240				318,643
Freading	3,931	3,437	4,062	3,744	3,636	10,521	3,101	3,176	3,597				39,205
Gale Databases	1,461,791	1,178,798	1,197,147	1,653,432	1,186,681	1,283,404	2,019,002	1,845,083	1,688,872	1,432,478			14,946,688
Gale Databases K-12	522,688	909,389	734,348	628,736	415,647	117,889	14,748	56,828	351,851	467,187			4,219,311
Gale Kids Infobits										213,383	200,036	220,810	634,229
Gale Kids Infobits K-12										54,303	56,500	46,356	157,159
Gale Legal Forms										1,470	709	909	3,088
Gale Career Transitions										10350	6205	3692	20,247
One Click Digital ebooks & audiobooks	3,133	2,867	3,399	3,261	3,144	3,373	64	0	0	58	0	0	19,299
Rocket Languages													237/1117
Zinio magazines							1542	1908	1761	3,198	7,395	4,817	20,621
New users/Total users													

2019 Resources

2019 Resources	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Ebsco Masterfile	21381	27741	25871	18744	11651	3306	3072	4299	15328	21795	19725	18713	191,626
Ebsco Masterfile Reference ebooks	0	0	0	53	0	0	0	0	24	7	15	12	111
Ebsco Novelist Plus	13,791	12,564	12,794	11,687	12,643	13,703	16,407	15,142	12,711	12,147	11,939	11,852	157,380
Ebsco Novelist Plus K-8	2,221	1,975	2,629	1,749	2,004	2,023	1,993	1,687	3,392	12,145	3,981	2,048	37847
Ebsco Read It!	4,327	6,555	3,523	2,926	1,733	328	287	434	2,442	3,300	2,262	1,063	29180
Gale Career Transitions	2,552	2,671	1,863	1,329	543	352	228	86	675	689	513	447	11,948
Gale Kids Infobits	41,849	54,268	55,822	24,895	29,401	8,016	1,633	1,670	8,262	29,255	25,912	21,271	302,254
Gale Legal Forms	953	995	1,035	1,077	1,177	1,079	1,165	1,174	934	1,039	788	645	12,061
Rocket Languages													2999/4116
Zinio Magazines													69479

Green databases are C5 requests
Blue databases are views/downloads
Orange databases are checkouts

New users/Total users
Estimate based on average data for Jan/Feb and Oct-Dec

2020 Resources

2020 Resources	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Ebsco Masterfile	36911	41585	21644	10677	9302	6960	7426	9773	9458	22790	24351	20729	221,606
Ebsco Masterfile C5	25171	25686	14450	7282	5316	2903	2958	3941	6863	11862	12070	8714	127,216
Ebsco Masterfile Reference ebooks	14	108	99	5	11	3	8	12	31	51	43	115	500
Ebsco Masterfile Reference ebooks C5	6	21	38	2	4	1	5	12	16	19	10	52	186
Ebsco Novelist Plus	13,155	12,576	12,691	14,712	13,542	15,910	18,693	14,179	13,395	15,708	13,019	15,558	173,138
Ebsco Novelist Plus K-8	3,407	1,938	1,889	2,139	1,722	2,022	2,342	2,594	6,768	3,697	2,273	1,895	32,686
Ebsco Read It!	3123	2568	2227	1134	678	304	308	506	818	1849	1728	881	16,124
Ebsco Read It! C5	2701	2332	1837	863	495	226	227	363	636	1566	1513	774	13,533
Gale Career Transitions	918	1,313	632	330	233	159	156	256	796				4,793
Gale in Context Elementary	35,015	57,603	40,044	14,555	12,499	3,878	3,033	3,028	6,816	11,636	12,521	12,583	213,211
Gale Legal Forms	865	1,169	1,226	878	556	472	711	641	699	990	536	592	9,335
Gale Peterson's Career Prep										801	1,942	1,331	1,124 → 5,198
Overdrive audiobooks												925	925
Overdrive ebooks												438	438
Rocket Languages													3114/7230
RBDigital Magazines													86,477

Green databases are C5 requests
Blue databases are views/downloads
Orange databases are checkouts

New users/Total users
FY20 data (10/19-9/20)

2021 Resources

2021 Resources	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
BrainFuse Homework HelpNow									8144	5866	5592	3154	22,756
BrainFuse JobNow							1390	2415	2940	1851	1350	1503	11,449
BrainFuse VetNow							575	907	603	299	223	259	2,866
Ebsco Masterfile	24,303	32,345	34,463	29,126	26,261	20,810	19,187	9,283	18,746	26,169	46,977	35,041	322,711
Ebsco Masterfile C5	9,673	16,822	20,104	14,869	12,628	4,745	3,050	3,372	11,529	13,940	16,245	12,173	139,150
Ebsco Masterfile Reference ebooks	80	27	97	25	27	15	13	13	48	98	129	177	749
Ebsco Masterfile Reference ebooks C5	31	9	34	9	8	5	3	2	11	18	28	18	176
Ebsco Novelist Plus	12,573	11,599	13,746	13,794	10,352	12,780	14,139	15,609	12,659	12,968	11,984	14,340	156,543
Ebsco Novelist Plus K-8	2,257	2,527	1,900	2,237	1,674	1,987	1,719	1,547	2,699	3,806	1,719	3,883	27,955
Ebsco Read It!	1505	1768	2145	1663	1359	943	237	602	1747	2727	2270	1,702	18,668
Ebsco Read It! C5	1,283	1,599	1,936	1,495	1,256	799	164	421	1,520	2,376	2,066	1,414	16,329
Gale in Context: Elementary	13,842	15,435	16,913	25,669	20,735	5,730	1,252	1,223	8,725	12,255	13,651	11,593	147,023
Gale Legal Forms	611	864	727	739	761	747	792	919	823	788	559	767	9,097
Gale Peterson's Career Prep	1,254	1,148	2,344	1,392	1,511	546	554	540	729	657	667	798	12,140
Overdrive audiobooks	1,176	1,256	1,533	1,406	1,374	1,379	1,364	1,550	1,444	1,823	1,684	1,689	17,678
Overdrive ebooks	656	719	779	690	676	688	767	1,045	1,104	1,669	1,611	1,695	12,099
Overdrive magazines (formerly RBD)	6,583	6,774	6,391	7,507	7,631	6,569	6,939	7,434	7,217	25,592	26,492	27,118	142,247
Rocket Languages													2119/9349

Green databases are C5 requests
Blue databases are views/downloads
Orange databases are checkouts

New users/Total users

Appendix K: School Libraries in Virginia

Observations and Recommendations to the Library of Virginia Regarding Services to School Librarians, Libraries, and Their Users

Prepared by Keith Lance, Ph.D.

Status of School Libraries and Librarians in Virginia

According to the national SLIDE study (T*he School Librarian Investigation—Decline or Evolution?*), Virginia is one of a small number of states in which school libraries are in a relatively strong position. The state mandates that schools have librarians (though that mandate is not uniformly enforced), has K12 standards that address the role of librarians (though not library media instruction in particular), provides licensed databases to all schools, and offers prospective school librarians three institutions of higher education where they can receive the professional education required to become a school librarian.

SLIDE reports that Virginia had more than 1,814 full-time equivalent school librarians in 2019-20, up from almost 1,693 in 2015-16. As such, it ranks fifth in the nation for its total number of school librarian FTEs. Dividing the state's number of librarians by its number of schools, there was an average of 0.86 librarian FTEs per school in 2019-20, up from 0.79 FTEs per school in 2015-16. This means that Virginia students and their teachers have gained readier access to school librarians over that period. The number of students per librarian dropped from 758 students to 715, while the number of teachers per librarian dropped from 53 to 48.

LSTA Projects Designed to Serve K12 Students

As part of its 2018–2022 Library Services and Technology Act (LSTA) plan, the Library of Virginia's Goal 2 was to facilitate access to information and the discovery of knowledge and cultural heritage for the purpose of cultivating an informed and engaged community. In connection with that goal, there were three projects that explicitly involved school librarians, libraries, and their users:
- *Cultural Heritage Access and Engagement*
- *FindItVirginia*
- *Genealogy Education*

State Program Report (SPR) data give some idea of the reach of these projects.

Cultural Heritage Access and Engagement
During FY 2018 and 2019, the Library promoted crowdsourcing and user engagement by collaborating with HandsOn Greater Richmond to encourage high school and college students to utilize the transcription platforms, Making History: Transcribe and From The Page in classroom settings. Digitization of yearbooks was especially encouraged. From FY 2018–2020 more than 25,000 items were digitized and made available to students

and other school and public library users. Usage data on these crowdsourced materials by participating high school students is not available.

FindItVirginia (FIVA)
FIVA provides a core set of electronic content statewide by leveraging the resources of the Library and local public libraries. Special efforts were made to promote use of these digital resources in completing homework by K–12 students. Such use of FIVA by students became particularly important when public schools had to operate remotely during the pandemic. Of the almost 50 million searches conducted between FY 2018-20, the precise number initiated by public school students and teachers is unknown, though it is likely to be in the tens of millions.

Genealogy Education
Through a series of workshops, the Library sought to create a new generation of family and community historians by developing ongoing relationships between new and experienced researchers. These relationships were sustained through a day-long conference, themed workshops (e.g., African-American genealogy), social media interactions, and an online, self-paced series of how-to modules. Middle and high school students were target populations for this effort. Between FY 2018–2020, more than 100 program sessions were held. The number held in public schools or attended by middle and high school students is unknown.

Recommendations from the Executive Council of School Librarians

Compared to most states, Virginia's infrastructure of support for school libraries and librarians is enviable; but, there is always room for improvement. We met with members of the Executive Council of School Librarians to learn how they believe the Library of Virginia could better serve school librarians, libraries, and their users via current and future LSTA-funded projects.

The *Cultural Heritage Access and Engagement (Making History)* project is familiar to school librarians via its summer seminars, a noteworthy example being one at the United States Holocaust Memorial Museum. Generally, however, seminars such as these could be better publicized to the school library community.

The *Genealogy Education* project was not familiar to council members, which may indicate that it is a more public-library-focused project. Perhaps this is a project where more intentional collaboration between public and school libraries would involve more middle and high school students.

While *FindItVirginia* e-resources are highly valued by these school librarians, they offer several recommendations for improvement:
- Expand after-school tutoring and homework help services, and collect and report output and outcome data about those services. (They feel that these services are especially needed during the pandemic.)
- For training opportunities offered asynchronously, explore ways to:

- Eliminate obstacles to access to such training, particularly for school librarians without colleagues or support staff,
- Offer leveled training to address specific needs, and
- Support a community of practice for virtual learners that facilitates their application of what they learn and communication with fellow learners.
- Explore ways to promote LSTA-funded projects that could benefit rural schools and schools that are underfunded.
- Explore ways to offer services to K12 educators and students that address "screen fatigue"
- Explore ways to increase communication and collaboration between the Library and the Virginia Department of Education. Specifically, council members believe this could be best achieved by there being a state school library consultant in VDE who is engaged with both the library and local school districts

Recommendations from the Evaluators

The evaluators offer several additional recommendations for improving services to the K–12 sector, though acknowledging that the current exigencies of the pandemic will likely require deferring their full implementation until at least the middle of the FY 2022-27 planning cycle.

More Specific Data About K12 Services

The library could better understand its degree of success in reaching K–12 students by collecting output data (e.g., numbers of searches, event attendance, etc.) on projects such specifically for that target population. In addition, it would be valuable to gather outcome data from K–12 students or their teachers by whatever means may be possible (e.g., short survey, focus group interview). If students could be surveyed, both output and outcome data could be collected simultaneously.

A Stronger Commitment to Outcome-Based Evaluation

Generally, based on available SPR data, the library does not appear to be conducting outcome-based evaluation (OBE) of its LSTA-funded projects. This could be a major area for improvement. Before preparing the next five-year plan, library staff might benefit from a refresher course on outcome-based evaluation. A key point at the outset of the OBE process is to set goals with realistic, practicably measurable outcomes. It is fairly easy to set idealistic outcomes, while setting ones that can actually be measured requires more thought. It is also a challenge to do—early on and realistically—the necessary work of establishing intended outcomes in advance and planning for data collection and reporting about them. Perhaps the most common error made in pursuing OBE is not even beginning the process until a report is due. Outcomes for which one wishes credit must be intentional and announced in advance; the related data collection is far more arduous, if not impossible, if it is not planned from the outset. As long as it is well-planned in advance, OBE can be done sufficiently and manageably without substantial additional resources.

Highly Effective Schools Through Libraries

An exemplary Colorado program for school libraries is the Highly Effective Schools Through Libraries program. School libraries that meet specified criteria—as well as their principals—are designated as Highly Effective Schools Through Libraries. This program not only recognizes exemplary programs but helps to sustain support for them in order to continue receiving this honor. It is an honor for the school, the librarian, and the principal, which, if properly developed and publicized, can be used as an incentive for either cultivating stronger support for school library programs or sustaining their support.

Such a program might be feasible and desirable in Virginia, if undertaken in partnership with the Virginia Department of Education and/or the Virginia Association of School Librarians.

More and Better Data About School Libraries and Librarians

Compared to public and academic libraries, there is almost no data about school libraries at any level—district, state, or national. It is impossible to make data-based decisions in such an absence of data. The most fundamental indicator of the lack of data about school libraries is that the only federal agency that collects any data about them is the National Center for Education Statistics (NCES). NCES's Common Core of Data—its oldest and most basic data collection about public education—asks only for the number of school librarians and library support staff in full-time equivalents. These data are far from perfect, as they are based on an outdated definition and are not restricted to state-certified librarians, but they are all that we have for every state and district in the nation. In addition to these CCD data, NCES's National Teacher and Principal Survey asks a national sample of individual schools if they have a library (yes or no) and how many full-time and part-time librarians they have. (Notably, those are head counts, not FTE data.) The vast majority of states do not collect or report any further data about school libraries and librarians.

Notably, Virginia is one of the nation's most reliable reporters of librarian FTE data to NCES. Only rarely in recent years have there been any cases of missing data, and, when this has occurred, it has been confined to one or two isolated cases.

If it is a priority and the library could partner with the Virginia Department of Education and/or the Virginia Association of School Librarians, consideration might be given to conducting a survey of school libraries at some regular interval. Due to the very limited data available from NCES and others, state library agencies wishing to serve school libraries and librarians are largely on their own at present.

See the SLIDE study website for more information.

Appendix L: LVA Inclusive Language Guide (April 2021)

LVA Inclusive Language Guide | April 2021

Table of Contents

INTRODUCTION: LANGUAGE MATTERS

The Library of Virginia works to encourage understanding of Virginia's history and culture, a goal that is now more important than ever. Our resources, services, programs, events, and exhibitions help to tell a more inclusive and complete story of the commonwealth's past than what has previously been published in history books. In that same way, the language that we share with the public needs to evolve. As we all know, language changes over time. Many terms and phrases that were once common-place reveal conscious or unconscious biases and are offensive and dehumanizing to today's readers.

This Inclusive Language Guide was created to help Library staff members improve the language in materials that we create going forward, to offer guidance in updating and correcting language we currently share with the public, and to alert staff members of the need to warn the public about offensive terms that might appear in collection materials. One general rule that applies to all of the areas covered in these guidelines: When writing about a current individual, follow the individual's preference for descriptive language, if known, and be specific when possible and relevant.

A Note About "Discoverability"

We want people to be able to search for and find records (and items within records), even those records with insensitive names or that contain insensitive terms. And we realize that the Library must use Library of Congress records terms that have not yet been updated. Therefore, it's acceptable to use some of these "unacceptable" terms in cataloging language or in lists of record types to make them discoverable. Similarly, it's okay to tag a blog post with a phrase like *slave narrative* (rather than *enslaved labor narrative*) if needed to make it discoverable.

The guide is a work in progress that will be updated over time. Feel free to share your questions, concerns, or suggestions for future updates (related to these and other relevant topics) with Ann Henderson, communications manager, at ann.henderson@lva.virginia.gov or 804.692.3611.

April 2021

SAMPLE CONTENT WARNING STATEMENTS, ETC.

The following are sample statements to include in documents or web pages to warn readers/users about offensive language found within historic materials.

General Statement (To be used where appropriate and where it would make sense)
CONTENT WARNING: Materials in the Library of Virginia's collections contain historical terms, phrases, and images that are offensive to modern readers. These include demeaning and dehumanizing references to race, ethnicity, and nationality; enslaved or free status; physical and mental ability; and gender and sexual orientation.

For Specific Materials (Could be adjusted for specific offenses found in the specific materials)
CONTENT WARNING: The following materials contain historical terms, phrases, or images that are offensive to modern readers. These may include demeaning or dehumanizing references to race, ethnicity, or nationality; enslaved or free status; physical or mental ability; or gender or sexual orientation.

Draft line to appear if an item has been removed from the website
This document has been temporarily removed while the Library of Virginia reviews and updates staff-authored materials such as publications, finding aids, and catalog records to avoid offensive language. We apologize for the inconvenience. An update should be available soon.

3

RACE, ETHNICITY, NATIONAL ORIGIN, WRITING ABOUT SLAVERY

Some general rules to follow: 1) When writing about a current individual, follow the individual's preference for descriptive language, if known, and be specific when possible and relevant. 2) If you need to mention an insensitive or offensive term because it appears within historic records, put the term in quotation marks the first time it appears and define/explain its historical use.

African American / Black

Note: When using the term *African American*, the Library's editorial style is to **omit the hyphen even when used as an adjective**. (One exception: You may see the hyphen included in the adjective form on materials related to the Strong Men & Women in Virginia History program, because of the preference of our partner organization, Dominion Energy.)

Although these terms can be used somewhat interchangeably in the United States, the term *African American* is typically used to describe ethnicity, while *Black* often describes race. Today, many people consider the term *African American* too restrictive for the current U.S. population. For example, Black people who live in America but are from parts of the world other than Africa may not identify as African American. However, those factions of people may still consider *Black* to be their identity. Americans of Caribbean heritage generally refer to themselves as *Caribbean American*. Follow an individual's preference if known, and be specific when possible and relevant. *Minneapolis has a large Somali American population because of refugee resettlement. The author is Senegalese American*. It's also important to consider the context and time in history that you are writing about.

Use *Black* when referring to an individual. Use the capitalized term as an adjective in a racial, ethnic or cultural sense: *Black people, Black culture, Black literature, Black studies, Black colleges*

Use *African American* where nationality is important, such as in *African American genealogy* or a historically *African American community* or *African American neighborhood*.

Some in the LVA review group suggested using *African Americans* for a plural noun construction, rather than the term *Black people*. But, again, it depends on context (geographic and time period) and, if current, the personal preferences of the people being described. Seeking feedback from our community and from Black stakeholders is recommended.

Further reading on this subject:

"Say African American or Black, but first acknowledge the persistence of structural racism"
https://www.urban.org/urban-wire/say-african-american-or-black-first-acknowledge-persistence-structural-racism

4

"Black vs. African-American:

The complex conversation Black Americans are having about identity #ForTheCulture"
https://www.wusa9.com/article/news/local/black-history/black-vs-african-american-the-complex-conversation-black-americans-are-having-about-identity-fortheculture/65-80dde243-23be-4cfb-9b0f-bf5898bcf069

Biracial, Multiracial

From the Associated Press Stylebook:
https://www.apstylebook.com/race-related-coverage
The terms *biracial* and *multiracial* are acceptable, when clearly relevant, to describe people with more than one racial heritage. Usually more useful when describing large, diverse groups of people than individuals. Avoid *mixed-race*, which can carry negative connotations, unless a story subject prefers the term. Be specific if possible, and then use *biracial* for people of two heritages or *multiracial* for those of two or more on subsequent references if needed. Examples: *She has an African American father and a white mother* instead of *She is biracial*. But: *The study of biracial people showed a split in support along gender lines*. *Multiracial* can encompass people of any combination of races. (Note: Some in the LVA review group report seeing a move away from *biracial* and toward *multiracial*).

From the Diversity Style Guide:
https://www.diversitystyleguide.com/topic-glossaries/raceethnicity-glossary/multiracial/
Multiracial: People of two or more racial backgrounds. In the 2010 U.S. census, approximately 9 million individuals, or 2.9 percent of the population, self-identified as multiracial. That number is expected to grow as more interracial couples have children.

If you need to refer to terms like *mulatto*, *quadroon*, *octoroon*, etc., within historic records, put the term in quotation marks the first time it appears and define/explain its historical use.

Black & white vs. Black & White

Capitalize the word *Black* when used to refer to racial or ethnic identity. However, the LVA review group suggests that the Library not capitalize the word *white* when referring to racial or ethnic identity because of its association (when capitalized) with white supremacy.

This is consistent with recent decisions by the Associated Press, *Columbia Journalism Review*, the *Wall Street Journal*, the *New York Times*, *USA Today*, the *Los Angeles Times*, *NBC News*, and the *Chicago Tribune*.

5

The *Columbia Journalism Review*'s statement on the subject sums up the LVA review group's reasoning as well: "We capitalize *Black*, and not *white*, when referring to groups in racial, ethnic, or cultural terms. For many people, *Black* reflects a shared sense of identity and community. White carries a different set of meanings; capitalizing the word in this context risks following the lead of white supremacists."

As the Associated Press says: "We will closely watch how usage and thought evolves, and will periodically review our decision."

From the Associated Press Stylebook:
https://www.apstylebook.com/race-related-coverage
Use of the capitalized **Black** recognizes that language has evolved, along with the common understanding that especially in the United States, the term reflects a shared identity and culture rather than a skin color alone.

Black(s), **white(s)** (n.) Do not use either term as a singular noun. For plurals, phrasing such as *Black people, white people, Black teachers, white students* is often preferable when clearly relevant. *White officers account for 64% of the police force, Black officers 21% and Latino officers 15%. The gunman targeted Black churchgoers.* The plural nouns *Blacks* and *whites* are generally acceptable when clearly relevant and needed for reasons of space or sentence construction. *He helped integrate dance halls among Blacks, whites, Latinos and Asian Americans. Black* and *white* are acceptable as adjectives when relevant.

For more reading on the subject: "AP says it will capitalize Black but not white"
https://apnews.com/7e36c00c5af0436abc09e051261fff1f

Person of Color, People of Color

The terms **person of color** and **people of color** are losing favor in current usage. When writing about an individual or a group of people of the same race or ethnicity, try to use a specific identity term such as **Black**, **Latinx**, a tribal affiliation, etc. To describe groups of people that include multiple (non-white) races or ethnicities, the phrase **Black, Indigenous, and People of Color** (BIPOC) is currently used in academic writing. This long phrase will not work for all uses, however. Therefore, the term **people of color**, while not recommended, is acceptable in some contexts. When writing about terms used in records and documents related to the slavery era, the term is sometimes needed. See **Writing About Slavery** below.

6

Writing About Slavery

Instead of *slave*, use *enslaved* or *captive* as an adjective before a noun like *person, woman, man, child, laborer(s), worker(s), African(s)* or *African American(s).*

Instead of *slave owner, slaveholder, slave master,* or *planter,* use *enslaver* or describe someone as a person who *claimed people as property, held people in slavery,* etc.

Instead of *slave labor,* use *stolen labor.* Use *stolen labor, knowledge, and skills* if context and space allows.

Instead of *born a slave,* use *born to enslaved parents, born to an enslaved woman,* or *born into slavery*.

The phrase *slave trade* still seems to be in common use (for example, in the important new website https://enslaved.org/). If you're seeking an alternative, however, use a phrase like *the sale of enslaved people* or *human trafficking,* or describe someone as a person who *worked in the business of slavery* or *sold people into slavery* rather than as a *slave trader.*

If you want an alternative to *runaway slave* (or *escaped slave, fugitive slave*), use *fugitive from slavery* or *freedom seeker* or a phrase like *a self-liberated* [or] *self-emancipated individual.* An alternative to *runaway slave ads* could be a phrase like *ads seeking fugitives from slavery*. The term *runaway* is still common usage, however. For example, the Freedom on the Move website (https://freedomonthemove.org/) uses both *fugitive* and *runaway* in its language.

Instead of *mulatto, quadroon, octoroon,* etc., use *biracial* or *multiracial*. If you need to use terms such as these within text sentences to refer to historical records, put the word or term in quotation marks the first time it appears and define/explain its historical use.

Within text sentences, when you need to mention record names (or terms used in records) such as *Free Negro, Free Negro Lists, Free Negro Registers*, etc., put the term in quotation marks the first time it appears and define/explain its historical use.

The phrase *free person of color* was commonly used in the 19th century by biracial and multiracial people in order to differentiate themselves from those described as *Free Negroes* or *Free Blacks*. In pre–Civil War court papers (freedom suits, Free Negro registrations, deeds of emancipation, etc.), many African Americans in the 19th century commonly referred to themselves as a *free person of color*. The "Archives for Black Lives In Philadelphia" supports using this term in describing historical records (see below).

7

Archives for Black Lives In Philadelphia: Anti-Racist Description Resources, "Describing Slavery Records":
https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf
Use *free [person|man|woman] of color* (often abbreviated as *f.p.c.*, *f.m.c.*, or *f.w.c.* on documents), *freed [person|man|woman]*, or another term to describe those who were not enslaved during a period when slavery existed in that society. Note that terminology differs depending on geographic location or language, and conduct research to avoid using anachronistic or geographically or linguistically inaccurate terms.

However, there are differences of opinion about its use in writing about slavery:
From **P. Gabrielle Foreman, et al. "Writing about Slavery/Teaching About Slavery: This Might Help"**
https://naacpculpeper.org/resources/writing-about-slavery-this-might-help/
Avoid using **people of color** as a blanket term when writing about Black people or other specific groups—unless you are referencing Cuba, where *gente de color* was a legitimate term used by peoples of African descent in the 19th century.

A Note About "Discoverability"
We want people to be able to find records (and items within records), even if those records have insensitive names or use insensitive terms. And we realize that the Library must use Library of Congress records terms that have not yet been updated. Therefore, it's acceptable to use some of the "unacceptable" terms in cataloging language or in lists of record types to make them discoverable. Similarly, it's okay to tag a blog post with a phrase like *slave narrative* (rather than *enslaved labor narrative*) if needed to make it discoverable.

For More Information & Further Reading

This document is the one that most organizations seem to be using as the new guideline:
P. Gabrielle Foreman, et al. "Writing about Slavery/Teaching About Slavery: This Might Help"
https://naacpculpeper.org/resources/writing-about-slavery-this-might-help/

This document is also relevant and has some information specifically for archival organizations:
Archives for Black Lives In Philadelphia: Anti-Racist Description Resources
Especially its section called "Describing Slavery Records"
https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf

8

Asian / Asian American / Asian Pacific Islander Desi American (APIDA)

From the University of South Carolina at Aiken, Dept. of Diversity Initiatives, Inclusive Language Guide
https://www.usca.edu/diversity-initiatives/training-resources/guide-to-inclusive-language/inclusive-language-guide/file

Asian refers to people who are citizens of countries in the Far East, Southeast Asia, or the Indian subcontinent, or to describe people of Asian descent. *Asian Americans* trace their origins to these regions.

Pacific Islander includes Native Hawaiian, Samoan, Guamanian, Fijian, and other peoples of the Pacific Island nations.

Desi refers to individuals whose cultural and ethnic identity are related to the Indian subcontinent and the diaspora.

Use *Asian/Pacific Islander* when referring to the relevant population in its entirety. Otherwise, use the preferred term of the individual or group. (Note: When writing about groups who live in the United States, use *Asian Pacific Islander Desi American(s)* or *Asian American(s)*.

Try to be specific when possible. For example, if you are referring to individuals from Japan, instead of saying *Asian*, use *Japanese*. Refer to groups as *Asian students*, *Asian faculty members*, etc., not *Asians*.

More information (with long list of countries):
Asian American Journalists Association, Covering Asia & Asian Americans
https://aaja.org/2020/11/30/covering-asia-and-asian-americans/

Latino / Latina / Latinx / Hispanic

From the National Association of Hispanic Journalists, Cultural Competence Handbook
https://nahj.org/wp-content/uploads/2020/08/NAHJ-Cultural-Competence-Handbook.pdf

Latino, Latina, Latinx, and *Hispanic* are often used as "umbrella terms" describing people who are from a Spanish-speaking country or whose ancestors are.

While the terms are sometimes used interchangeably, in reality *Hispanic* only refers to persons of Spanish-speaking origin or ancestry, while *Latino* is accurate to refer to anyone of Latin American origin or ancestry. Note: *Latino* applies to men, boys, and mixed-gender groups (i.e., Latino community); *Latina* applies to women and girls.

9

While it may be accurate to describe a person with either **Hispanic** or **Latino**, it does not make the terms interchangeable, because they mean two separate things. Be mindful that some prefer to identify themselves as *Hispanic*, while others call themselves Latino or choose to be identified specifically by their country of origin. The National Association of Hispanic Journalists recommends asking the person or group how they want to be identified.

Pronounced "La-teen-ex" (or sometimes "La-tin-ex"), **Latinx** is a gender-neutral term sometimes used in lieu of *Latino* or *Latina* for people of Latin American heritage. For those who identify with two or more Latin American cultural or racial identities, *Latinx* is a term that is all-inclusive. There has been some pushback regarding use of this term, however: https://www.washingtonpost.com/outlook/latinx-latinos-unpopular-gender-term/2020/12/18/bf177c5c-3b41-11eb-9276-ae0ca72729be_story.html

From GENIAL (Generating Engagement and New Initiatives for All Latinos)
https://www.exploratorium.edu/sites/default/files/Genial_2017_Terms_of_Usage.pdf

Hispanic: Someone who is a native of, or descends from, a Spanish-speaking country

Chicano/Chicana: Someone who is native of, or descends from, Mexico and who lives in the United States

Latino/Latina: Someone who is native of, or descends from, a Latin American country (can include people from Brazil)

From *USA Today*
https://www.usatoday.com/story/news/nation/2019/06/29/latina-latino-latinx-hispanic-what-do-they-mean/1596501001/
Latinx: The gender-neutral term for *Latino* and *Latina*. Use of the term *Latinx* to refer to all people of Latin American descent has become more common as members in the LGBTQ community and its advocates have embraced the label.

Regarding the term *Hispanic*
Outreach staff members have recently been seeing the rejection of *Hispanic*, particularly among young people, with criticism of the term because of its association with colonization. Avoid using it as a blanket term to describe groups of people from different countries. When using this term, if space allows, define it and explain why it's being used.

10

Native American / Virginia Indian / Indigenous Peoples

From *The Chicago Manual*

https://www.chicagomanualofstyle.org/book/ed17/part2/ch08/psec038.html

Many among those who trace their roots to the Aboriginal peoples of the Americas prefer ***American Indians*** to ***Native Americans***, and in certain historical works *Indians* may be more appropriate.

From the Native American Journalists Association

https://najanewsroom.com/reporting-guides/

https://najanewsroom.com/wp-content/uploads/2018/11/NAJA_Reporting_and_Indigenous_Terminology_Guide.pdf

When possible, identify individuals as tribal members or citizens according to the tribe's preferred terminology. Identification by tribal citizenship is preferable to general terms such as ***Native American*** when citizenship information is available.

Native American or ***American Indian****?*

Either term is generally acceptable and can be used interchangeably, although individuals may have a preference. ***Native American*** gained traction in the 1960s for American Indians and Alaska Natives. Over time, *Native American* has been expanded to include all Native people of the continental United States and some in Alaska. Although the two terms can be used interchangeably, the term *Native American* should be used only to describe groups of Native Americans—two or more individuals of different tribal affiliation. Always try to identify people by their preferred tribal affiliation when describing individuals or individual tribes.

Native

The term ***Native*** can be used as an adjective to describe styles, such as *Native fashion*, *Native music*, or *Native art*. Exercise caution when using the word, though, as it is primarily used as slang.

Indigenous

While an official definition of ***Indigenous*** is not agreed on, the United Nations has developed an understanding of the term based on self-identification; historical continuity to pre-colonial and/or pre-settler societies; links to territories and resources; distinct social, economic, and political systems; and possession of distinct languages, cultures, and beliefs. In the case of the United States, tribal membership or citizenship denotes Indigenous identity. These factors make the word *Indigenous* an identity, not an adjective, and the Native American Journalists Association urges writers to capitalize these terms in order to avoid confusion between *indigenous plants and animals* and *Indigenous human beings*. Finally, avoid referring to *Indigenous people* as possessions of states or countries. Instead of *Wyoming's Indigenous people*, try *the Indigenous people of Wyoming*.

11

Indigenous people or *Indigenous peoples?*
This term seems to be used both ways, but with a preference for **peoples** among Indigenous communities, particularly younger members.

The Chicago Manual says (www.chicagomanualofstyle.org/book/ed17/part2/ch05/psec016.html): "Strangely enough, *person* forms two plurals—*persons* and *people*—but *people* also forms the plural *peoples* {the **peoples** of the world}."

From Smithsonian National Museum of the American Indian
https://americanindian.si.edu/nk360/didyouknow#topq2
American Indian, Indian, Native American, Native
All of these terms are acceptable. The consensus, however, is that whenever possible, Native people prefer to be called by their specific tribal name. In the U.S., **Native American** has been widely used but is falling out of favor with some groups. The terms **American Indian** or **Indigenous American** are preferred by many Native people.

Roxanne Dunbar-Ortiz in her book *An Indigenous Peoples' History of the United States*:
"I refrain from using *America* and *American* when referring only to the United States and its citizens. Those blatant imperialistic terms annoy people in the rest of the Western Hemisphere, who are, after all, also Americans."

Karenne Wood's book *Virginia Indian Heritage Trail*, published by Virginia Humanities in 2008, has a short section on writing about Virginia Indians and language to use.
https://www.virginiahumanities.org/wp-content/uploads/2018/02/VA-Indian-Trail-Guide.pdf

White / Caucasian

Although the term *Caucasian* is commonly used interchangeably with the term *white* to refer to people having European ancestry, avoid this term because of its origins connecting it to eugenics and white supremacy. Read more at these links.
https://www.nytimes.com/2013/07/07/sunday-review/has-caucasian-lost-its-meaning.html
https://www.latimes.com/opinion/story/2019-09-10/race-caucasian-myth-racism
https://www.sapiens.org/column/race/caucasian-terminology-origin/

12

SEXUAL ORIENTATION & GENDER

Some general rules to follow: 1) When writing about a current individual, follow the individual's preference for descriptive language, if known, and be specific when possible and relevant. 2) If you need to mention an insensitive or offensive term because it appears within historic records, put the term in quotation marks the first time it appears and define/explain its historical use.

Gender Neutral & Gender Inclusive Language Guidance

Try to avoid gender bias when writing about people's participation in society. It can be tricky to balance inclusion with the historical reality of gender roles and sex discrimination. The following are just a few examples. Finding alternatives will require professional judgment and knowledge of the historical context.

The term **gender nonconforming** is useful when discussing people in a historical context.

Instead of **frontiersmen** use **settlers**. Not all European settlers were men. (In some cases the word **colonizers** might be more accurate.)

Instead of **men** or **enlisted men** use **enlisted soldiers** when referring to pre-20th-century soldiers. We know women and gender-nonconforming people fought, but of course they could not do so openly.

Instead of **men and women** use **people** when referring to 20th-century soldiers. The intent of *men and women* is inclusion, and *people* better reflects the existence of gender nonconforming people in the 20th-century military. However, there are cases where it's awkward or impossible to substitute *soldiers* for *men* (for instance, *cavalrymen*). If you can't re-phrase, then leave the term as-is.

It's okay to use **women** when discussing members of Women Clubs. While these organizations no doubt had gender-nonconforming members, they were explicitly for women.

We hope to expand this section with more examples to provide more guidance. We recommend that people use their best judgment, while erring on the side of gender-neutral language.

Excerpts from the GLAAD Media Reference Guide Glossary of Terms
https://www.glaad.org/reference
https://www.glaad.org/sites/default/files/GLAAD-Media-Reference-Guide-Tenth-Edition.pdf
The terminology that follows applies to writing about contemporary subjects. When writing about people in the past, we can describe behaviors and relationships but should not necessarily label their identities.

13

Acceptable Terms & Their Definitions (a list of terms to avoid will follow)**:**

asexual
An adjective used to describe people who do not experience sexual attraction (e.g., *asexual person*). A person can also be ***aromantic***, meaning they do not experience romantic attraction. (For more information, visit asexuality.org.)

bisexual, bi
A person who has the capacity to form enduring physical, romantic, and/or emotional attractions to those of the same gender or to those of another gender. People may experience this attraction in differing ways and degrees over their lifetime. Bisexual people need not have had specific sexual experiences to be bisexual; in fact, they need not have had any sexual experience at all to identify as bisexual. Do not use a hyphen in the word *bisexual*, and only capitalize bisexual when used at the beginning of a sentence.

civil union
Historically used in the U.S. to describe state-based relationship recognition for same-sex couples that offered some or all of the state (though none of the federal) rights, protections, and responsibilities of marriage. While many Western countries (including the United States) have now legalized marriage for same-sex couples, others only legally recognize same-sex relationships through civil unions.

coming out
A lifelong process of self-acceptance. People forge a LGBTQ identity first to themselves and then they may reveal it to others. Publicly sharing one's identity may or may not be part of coming out.

domestic partnership
Civil/legal recognition of a committed relationship between two people that sometimes extends limited protections to them.

gay
The adjective used to describe people whose enduring physical, romantic, and/or emotional attractions are to people of the same sex (e.g., ***gay man, gay people***). Sometimes ***lesbian*** (n. or adj.) is the preferred term for women. Avoid identifying gay people as ***homosexuals***, an outdated term considered derogatory and offensive to many lesbian and gay people.

gender expression
External manifestations of gender, expressed through a person's name, pronouns, clothing, haircut, behavior, voice, and/or body characteristics. Society identifies these cues as masculine and feminine, although what is considered masculine or feminine changes over time and varies by culture. Typically, transgender people seek to align their gender expression with their gender identity, rather than the sex they were assigned at birth.

14

gender identity
A person's internal, deeply held sense of their gender. For transgender people, their own internal gender identity does not match the sex they were assigned at birth. Most people have a gender identity of man or woman (or boy or girl). For some people, their gender identity does not fit neatly into one of those two choices. Unlike *gender expression, gender identity* is not visible to others.

heterosexual
An adjective used to describe people whose enduring physical, romantic, and/or emotional attraction is to people of the opposite sex. Also *straight*.

intersex
An umbrella term describing people born with reproductive or sexual anatomy and/or a chromosome pattern that can't be classified as typically male or female. Those variations are also sometimes referred to as Differences of Sex Development (DSD). Avoid the outdated and derogatory term *hermaphrodite*. While some people can have an intersex condition and also identify as transgender, the two are separate and should not be conflated. (For more information, visit interactyouth.org.)

lesbian
A woman whose enduring physical, romantic, and/or emotional attraction is to other women. Some lesbians may prefer to identify as gay (adj.) or as gay women. Avoid identifying lesbians as *homosexuals*, a derogatory term.

LGBTQ
Acronym for lesbian, gay, bisexual, transgender, and queer. Sometimes, when the Q is seen at the end of LGBT, it can also mean questioning. LGBT and/or GLBT are also often used. The term *gay community* should be avoided, as it does not accurately reflect the diversity of the community. Rather, *LGBTQ community* is preferred.

out
A person who self-identifies as LGBTQ in their personal, public, and/or professional lives. For example: *Ricky Martin is an out pop star from Puerto Rico*. Preferred to *openly gay*.

queer
An adjective used by some people, particularly younger people, whose sexual orientation is not exclusively heterosexual (e.g., *queer person*, *queer woman*). Typically, for those who identify as queer, the terms *lesbian*, *gay*, and *bisexual* are perceived to be too limiting and/or fraught with cultural connotations they feel don't apply to them. Some people may use queer, or more commonly *genderqueer*, to describe their gender identity and/or gender expression. Once considered a pejorative term, queer has been reclaimed by some LGBT people to describe themselves; however, it is not a universally accepted term even within the LGBT community. When Q is seen at the end of LGBT, it typically means *queer* and, less often, *questioning*.

15

sex

The classification of a person as male or female. At birth, infants are assigned a sex, usually based on the appearance of their external anatomy. (This is what is written on the birth certificate.) A person's sex, however, is actually a combination of bodily characteristics including: chromosomes, hormones, internal and external reproductive organs, and secondary sex characteristics.

sexual orientation

The scientifically accurate term for an individual's enduring physical, romantic and/or emotional attraction to members of the same and/or opposite sex, including lesbian, gay, bisexual, and heterosexual (straight) orientations. Avoid the offensive term *sexual preference*, which is used to suggest that being gay, lesbian, or bisexual is voluntary and therefore "curable." People need not have had specific sexual experiences to know their own sexual orientation; in fact, they need not have had any sexual experience at all. Transgender people may be straight, lesbian, gay, bisexual, or queer. For example, a person who transitions from male to female and is attracted solely to men would typically identify as a straight woman.

transgender, transsexual

An umbrella term for people whose gender identity and/or gender expression differs from what is typically associated with the sex they were assigned at birth. People under the transgender umbrella may describe themselves using one or more of a wide variety of terms, including *transgender*. Use the descriptive term preferred by the person. Many transgender people are prescribed hormones by their doctors to bring their bodies into alignment with their gender identity. Some undergo surgery as well. But not all transgender people can or will take those steps, and a transgender identity is not dependent upon physical appearance or medical procedures. For a glossary of related terms, see: https://www.glaad.org/reference/transgender

Terms to Avoid:

biphobia

Fear of bisexuals, often based on stereotypes, including inaccurate associations with infidelity, promiscuity, and transmission of sexually transmitted infections. *Intolerance*, *bias*, or *prejudice* is usually a more accurate description of antipathy toward bisexual people.

closeted

Describes a person who is not open about their sexual orientation. Better to simply refer to someone as *not out* about being LGBTQ. Some individuals may be out to some people in their life, but not out to others due to fear of rejection, harassment, violence, losing one's job, or other concerns.

16

gay community
This term should be avoided, as it does not accurately reflect the diversity of the community. Rather, *LGBTQ community* is preferred.

hermaphrodite
Avoid this outdated and derogatory term. Use *intersex* instead. While some people can have an intersex condition and also identify as transgender, the two are separate and should not be conflated.

homophobia
Fear of people attracted to the same sex. *Intolerance, bias,* or *prejudice* is usually a more accurate description of antipathy toward LGBTQ people.

homosexual
An offensive term to avoid. Outdated clinical term considered derogatory and offensive. The Associated Press, *New York Times,* and *Washington Post* restrict usage of the term.

lifestyle
An offensive term to avoid. Inaccurate term used by anti-LGBTQ extremists to denigrate LGBTQ people. As there is no one straight lifestyle, there is no one LGBTQ lifestyle.

openly gay
Describes people who self-identify as gay in their personal, public, and/or professional lives. Also *openly lesbian, openly bisexual, openly transgender, openly queer*. While accurate and commonly used, the phrase still implies a confessional aspect to publicly acknowledging one's sexual orientation or gender identity.

outing
The act of publicly declaring (sometimes based on rumor and/or speculation) or revealing another person's sexual orientation or gender identity without that person's consent. Considered inappropriate by a large portion of the LGBTQ community.

same-sex marriage
The terms *gay marriage* and *same-sex marriage* should be avoided, as they can suggest marriage for same-sex couples is somehow different than other marriages. In June 2015, the U.S. Supreme Court ruled in *Obergefell v. Hodges* that every American has the constitutional right to marry the person they love. When reporting on marriage for same-sex couples, preferred terminology includes *marriage equality* and *marriage for same-sex couples*.

sexual preference
Avoid this offensive term, which is used to suggest that being gay, lesbian, or bisexual is voluntary and therefore "curable." *Sexual orientation* is the scientifically accurate term for an individual's enduring

17

physical, romantic and/or emotional attraction to members of the same and/or opposite sex, including lesbian, gay, bisexual, and heterosexual (straight) orientations.

sodomy laws
Historically used to selectively persecute gay people, the state laws often referred to as **sodomy laws** were ruled unconstitutional by the U.S. Supreme Court in *Lawrence v. Texas* (2003). **Sodomy** should never be used to describe same-sex relationships or sexual orientation.

TRANSGENDER NAMES, PRONOUN USAGE & DESCRIPTIONS

Always use a transgender person's chosen name.
Many transgender people are able to obtain a legal name change from a court. However, some transgender people cannot afford a legal name change or are not yet old enough to legally change their name. They should be afforded the same respect for their chosen name as anyone else who uses a name other than their birth name (e.g., celebrities). It is never appropriate to put quotation marks around either a transgender person's chosen name or the pronoun that reflects that person's gender identity.

Use the pronoun that matches the person's authentic gender.
A person who identifies as a certain gender, whether or not that person has taken hormones or undergone surgery, should be referred to using the pronouns appropriate for that gender. If you are not certain which pronoun to use, ask the person, "What pronouns do you use?"

If it is not possible to ask a transgender person which pronoun they use, use the singular they or use the pronoun that is consistent with the person's appearance and gender expression.
For example, if a person wears a dress and uses the name Susan, feminine pronouns are usually appropriate. Or it is also acceptable to use the singular *they* to describe someone when you don't wish to assign a gender. For example: "Every individual should be able to express *their* gender in a way that is comfortable for *them*."

Some use the singular *they* to reflect their non-binary gender identity and/or gender expression.
In 2015, *The Washington Post* updated its style guide to include the singular *they* to describe people who "identify as neither male nor female." It is increasingly common for people who have a non-binary gender identity and/or gender expression to use they/them as their pronoun. For example: "Jacob writes eloquently about their non-binary identity. They have also appeared frequently in the media to talk about their family's reaction to their gender expression."

The *AP Stylebook* has also allowed this use:
https://www.nbcnews.com/feature/nbc-out/ap-stylebook-embraces-they-singular-gender-neutral-pronoun-n739076

18

MENTAL & PHYSICAL ABILITY / MEDICAL ISSUES

Some general rules to follow: 1) When writing about a current individual, follow the individual's preference for descriptive language, if known, and be specific when possible and relevant. 2) If you need to mention an insensitive or offensive term because it appears within historic records, put the term in quotation marks the first time it appears and define/explain its historical use.

From the University of Kansas Research and Training Center on Independent Living:
Guidelines: How to Write about People with Disabilities
http://rtcil.org/products/media/guidelines

Acceptable Language Options: A Partial Glossary of Disability Terms

Acquired disability refers to a disability (other than a developmental disability) that occurred sometime after birth.

Amputee, limb loss and limb difference are terms used to describe a person who has lost a limb due to an accident or illness. *Limb difference* is more often used for people who have a congenital condition (one that was present at birth). Descriptive terms like *lower-* or *upper-limb loss* and *below-knee* or *above-knee amputation* may be used, e.g., *She has upper-limb loss* or *Her leg was amputated above the knee.*

ADHD (Attention Deficit Hyperactivity Disorder) is the clinical diagnosis for a genetic neurobehavioral condition that is characterized by symptoms in three categories: inattention, excessive activity and impulsive behavior. Say *person with ADHD*. Do not use *hyper* or *lazy*.

Autism spectrum disorder (ASD) refers to a complex neurodevelopmental disability that may cause differences in social interaction, verbal and nonverbal communication, sensory processing, and repetitive behaviors. People who are not autistic and do not have other cognitive disabilities are sometimes referred to as *neurotypical*.

Asperger's syndrome, which was previously considered a stand-alone diagnosis, was removed from the Diagnostic and Statistical Manual of Mental Disorders in 2013 and is now considered under the ASD umbrella. People on the autism spectrum can have significant limitations in one area with no limitations in others. Use *child with autism, person on the spectrum* or *autistic man*. Labels like *high-functioning* and *low-functioning* are not helpful because such distinctions can impact the way an autistic person is treated and are considered offensive by the autistic community.

Blind and low vision describes a condition in which a person has loss of sight for ordinary life purposes. A person is *legally blind* when vision with best correction is no better than 20/200. *Low vision* and *vision loss* are generic terms for vision loss caused by macular degeneration and other

19

conditions. *Low vision* usually refers to someone who is legally blind, but can still see large print, bright colors, light and shadow and large shapes, while *vision loss* refers to those who have lost vision after birth. Say *he is blind* or *girl who has low vision*. (You may ask which term best suits the person.) Some blind people consider themselves visual thinkers so they regard **visually impaired, vision impaired,** and **visually challenged** as negative terms. (Note: Virginia has a Department for the Blind and Vision Impaired (https://www.vdbvi.org), so it's okay to use the term **vision impaired** when writing in a generic way, and not about an individual person.)

Brain injury and traumatic brain injury (TBI) describe a condition where there is long-term or temporary disruption in brain function. The two types are distinguished by cause, with a **non-traumatic** or **acquired brain injury** resulting from an internal event, like a stroke or seizure, whereas a **TBI** results from an external injury, such as a fall or car crash. Difficulties with cognitive (thinking, remembering, learning), physical, emotional and/or social functioning may occur. Use *person with a brain injury* or *person who has a traumatic brain injury*. Do not say **brain damaged**.

Chemical and/or electromagnetic intolerances or sensitivities describe chronic medical conditions characterized by neurological impairment, muscle pain and weakness, respiratory problems and gastrointestinal complaints. Reactions for those with **chemical intolerances** are triggered by low-level exposure to everyday substances and products, including pesticides, solvents, cleaning agents, new carpeting and adhesives, fragrances and scented products. **Electrical hypersensitivities** are triggered by electromagnetic fields from electrical devices and frequencies. Chemical and electromagnetic intolerances or sensitivities are also called **toxicant-induced loss of tolerance (TILT)**, **environmental illness** or **sick building syndrome**. Use *person with chemical intolerance, person with electrical hypersensitivities* or *people with environmental illness*. Do not use the terms **chemphobic** or **idiopathic environmental intolerance**.

Chronic health conditions or diseases refer to conditions that are persistent, generally lasting more than three months, not preventable by vaccines, and not curable by medication. There is some variation in use of this term. The Centers for Disease Control and Prevention (CDC) classify heart disease, stroke, cancer, diabetes, obesity, and arthritis as examples of chronic diseases. The Centers for Medicare and Medicaid Services have a more extensive list of chronic conditions that includes dementia, depression, and HIV. Use *person with cancer* or *people who have AIDS*. Do not use the term **victim**, e.g., *AIDS victim*.

Cleft palate or lip describes a specific congenital disability involving the roof of the mouth, lip and gum. Say *person who has a cleft palate*. The term **hare lip** is anatomically incorrect and stigmatizing.

Congenital disability describes a disability that has existed since birth but is not necessarily hereditary, such as cerebral palsy. Use *person with a congenital disability* or *person with a disability since birth*. **Birth defect** and **deformity** are considered offensive.

20

Deaf and hearing impairment. *Deaf* refers to a degree of hearing loss that is significant enough to prevent understanding speech through the ear. Deaf people (as a group) usually identify as *the Deaf* or *Deaf community* (with a capital D) rather than *people who are deaf*. They are part of a specific community made up of those who share a common culture and sign language. ***Hearing impairment, hearing loss, deafness,*** or ***hearing difficulties*** are generic terms used by some individuals to indicate any degree of hearing loss, from mild to profound, although some perceive the term *hearing impaired* as negative. Members of the Deaf community do not use any of these terms as they are medically defined. ***Hard of hearing*** refers to those with a mild to moderate hearing loss who may use technology for amplification. A person who has hearing difficulties may have speech difficulties, too, but deafness does not affect mental abilities. Use *deaf woman* or *hard of hearing boy*. People who have some degree of hearing and vision loss prefer the term ***Deaf-Blind***. Never use ***deaf and dumb*** or ***deaf mute***.

Developmental disability (DD) is an umbrella term for a number of lifelong conditions apparent during the developmental period. The developmental period is generally understood to end at the age of 22. The most common DD conditions are intellectual disability, Down syndrome, autism, cerebral palsy, spina bifida, fetal alcohol syndrome, and fragile X syndrome. Although the term ***intellectual disability*** is often used in conjunction with ***developmental disability***, many people with a developmental disability do not have an intellectual disability. The acronym ***IDD*** is used to describe a group that includes people with ID, people with another DD, and/or people with both. The supports that people with DD or IDD need to meet their goals vary in intensity from intermittent to pervasive. Say *she has cerebral palsy*, *he has a developmental disability* or *he is autistic*. Do not say ***mentally retarded***.

Disability is a general term used to indicate that the environment does not accommodate a person's abilities. The term may refer to a physical, sensory, or mental condition. Do not use the term ***handicapped*** because many *people with disabilities* consider it offensive. Some people object to the term ***disabled*** because it suggests the person has an inability to function (as in a disabled car) and it suggests that people with disabilities are a homogeneous group. Others proudly claim *disabled* as part of their identity, and others prefer the terms ***difference*** and ***differently abled*** because they avoid the negative implications of *disability*. However, some consider *differently abled* a euphemism that does not acknowledge the truth. The term is considered offensive within disability communities, particularly among many Black people who are disabled or deaf, who feel they are, in fact, disabled by social and institutional barriers. (Note: Don't use the term *differently abled* unless it's the preference of a specific individual.) Again, language is always evolving. The range of available terms reflects a movement toward greater inclusivity, which is a positive development. When in doubt, ask. When you can't ask, use ***people with disabilities*** or ***the disability community***.

Disfigurement refers to cosmetic or physical changes to the body caused by burns, trauma, disease, congenital conditions, surgery, or other events. Although disfigurement may not affect a person's functional abilities, it can limit a person's opportunities because of fear and bias from others. Do not say ***burn victim***. Say ***burn survivor*** or *child who has burns*.

21

Down syndrome describes a specific chromosomal condition that results in intellectual disability, a distinctive appearance, and particular health concerns. Down syndrome is a developmental disability. Say *person with Down syndrome*. Do not use **mongoloid** or **Down person**.

Dwarfism, see *Little person*

Emotional support animal, see *Service animal*

Intellectual disability (ID) is a condition defined by substantial limitations in both intellectual functioning and adaptive behavior that are apparent during the developmental period. ID is a developmental disability, and the supports that people with ID need to meet their goals vary in intensity from intermittent to pervasive. Though **mental retardation** was once an accepted clinical term, it became commonly used as an insult or slur, so people who have ID, their families, and advocacy organizations campaigned to end its use. Say *people with intellectual disabilities*. Do not use **retarded**, **mentally retarded** or **subnormal**.

Invisible disabilities, sometimes called hidden disabilities, include a wide range of conditions that are not immediately apparent to others, such as autism spectrum disorders, mental health conditions, learning disabilities, fibromyalgia, and traumatic brain injuries. Some people with accessible parking permits have an invisible disability, so it is not fair to assume they are not permitted to use an accessible parking space based on their appearance.

Learning disabilities refer to a number of disorders that may affect the acquisition, organization, retention, understanding or use of verbal or nonverbal information. These disorders affect learning in individuals who otherwise demonstrate at least average abilities essential for thinking and/or reasoning. As such, learning disabilities are distinct from global intellectual disability. Learning disabilities result from impairments in one or more processes related to perceiving, thinking, remembering or learning. These include but are not limited to: language processing, phonological processing, visual spatial processing, processing speed, memory and retention, and executive functions, such as planning and decision making. Dyslexia is an example of a learning disability. Say *person with a learning disability*. Do not use **slow learner** or **retarded**.

Little person or person of short stature describes people who have a variety of genetic conditions that cause them to grow to less than 4'10" tall. **Dwarfism** is a medical term, but it should not be used as general terminology. Do not refer to these individuals as **midgets** because the term carries circus sideshow connotations.

Mental illness and psychiatric disability refer to a variety of psychological conditions. Say *person with a mental illness or psychiatric disability*. If necessary for medical or legal accuracy, use diagnostic terms such as *schizophrenia*, *psychosis*, or *bipolar disorder* (which replaced **manic depression**). Words such as **crazy**, **maniac**, **lunatic**, **schizo** and **psycho** are offensive and should never be applied to people with

22

mental health conditions. For more details, refer to the Entertainment Industries Council's online style guide at eiconline.org.

Nondisabled is the preferred term when the context requires a comparison between people with and without disabilities. Use **nondisabled** or *people without disabilities* instead of **able-bodied**, **normal** or **healthy**.

Physical disability is an umbrella term that refers to conditions affecting a person's physical functioning, dexterity, and stamina, thereby affecting a person's ability to operate in their environment. Examples include spinal cord injury, amputation, and other conditions that may have physical manifestations, like multiple sclerosis or stroke.

Post-polio syndrome is a condition that affects some people long after their recovery from poliomyelitis (polio). It is characterized by muscle weakness, joint and muscle pain, and fatigue. People who experience post-polio syndrome are not currently experiencing the active phase of the virus. Say *person with post-polio syndrome*. Do not **use polio victim**.

Seizure describes an involuntary muscle contraction and/or a brief impairment or loss of consciousness resulting from a neurological condition such as epilepsy or a brain injury. Say *girl with epilepsy* or *teen with a seizure disorder*. Do not use **epileptic fit** or **spastic attacks**.

Sensory disability is an umbrella term that refers to conditions of sight, hearing, touch, smell or taste. Blindness and deafness are sensory disabilities. Autistic people may have sensory disabilities or hypersensitivity to sounds, lights, or other sensations. People who have a sensory processing disorder have trouble receiving and responding to information gathered through the senses.

Service animal or service dog describe animals that have been individually trained to assist or perform tasks for people with disabilities. In addition to guiding people with blindness or low vision, they may alert deaf people, pull wheelchairs, alert and protect a person who is having a seizure, remind a person to take prescribed medications, or calm a person with post-traumatic stress disorder during an anxiety attack. **Seeing eye dog** is an outdated and less inclusive term. An **emotional support animal** is an assistance animal that may or may not have special training and is recognized as a reasonable accommodation for a person with a disability under the federal Fair Housing Act. While emotional support animals are often used as part of a medical treatment plan as therapy animals, they are not considered service animals under the ADA and may be prohibited in public spaces.

Speech disability is an umbrella term for several conditions in which a person has limited speech patterns. Use *child who has a speech disability*. For a person without speech capability, say *non-speaking* or *person without speech*. Do not use **mute** or **dumb**.

23

Spinal cord injury (SCI) describes a condition in which there has been permanent damage to the spinal cord, resulting in some degree of impairment or paralysis. *Quadriplegia* or *tetraplegia* denote some loss of function in all four extremities, while *paraplegia* refers to loss of function only in the lower part of the body. In both cases, the individual might have some function in the affected limbs. While people with spinal cord injuries may refer to themselves as a ***para*** or a ***quad***, communicators should use *man with paraplegia, woman with paralysis* or *person with a spinal cord injury*. Don't say ***cripple*** or ***handicapped***.

Substance use disorder refers to patterns of drug or alcohol use that result in significant impairment in at least three life areas (family, employment, health) over any 12-month period. Although such terms as ***alcoholic*** and ***addict*** are medically acceptable, some individuals may consider them derogatory. More acceptable terms are *people who are substance dependent* or *person who is alcohol dependent*. Individuals who have a history of dependence on alcohol and/or drugs and are no longer using alcohol or drugs may identify themselves as ***recovering*** or as a *person in recovery*.

Survivor is used to affirm a person's recovery from an adverse health condition such as cancer, burns, brain injury, or stroke. Use *cancer survivor* or *brain injury survivor*. *Survivor* is preferable to ***victim*** because it recognizes a person's ability to grow, change, and overcome adversity.

Visible disabilities are conditions that others can observe. Visible disabilities include many physical disabilities, Down syndrome, and conditions that require the obvious use of supports such as communication devices, external hearing aids, crutches, etc.

Vision impaired, see *Blind and low vision*

Wheelchair user refers to a person who uses a wheelchair. People with any number of disabilities may use wheelchairs, and people may use wheelchairs continuously or only under certain conditions. Don't say ***wheelchair-bound*** or ***confined to a wheelchair***, as these terms are inaccurate and convey pity. A wheelchair or other assistive device enables the user to participate more fully in life.

24

CHILDREN OF UNMARRIED PARENTS

When writing about children of unmarried parents, you might need to refer to the legal term *illegitimate child(ren)* when discussing records or other documents. However, the term *nonmarital child(ren)*, which is less offensive, is now gaining favor in the legal world. When not referring to records, search terms, or legal terms, use a phrase such as *child(ren) of unmarried parents* or write that the person's *parents were not married*.

25

FOR FURTHER READING

Conscious Style Guide
https://consciousstyleguide.com

National Assembly of State Arts Agencies, Inclusive Language Guide
https://nasaa-arts.org/nasaa_research/inclusive-language-guide/

University of South Carolina at Aiken, Dept. of Diversity Initiatives, Inclusive Language Guide
https://www.usca.edu/diversity-initiatives/training-resources/guide-to-inclusive-language/inclusive-language-guide/file

Archives for Black Lives in Philadelphia: Anti-racist Description Resources
https://archivesforblacklives.files.wordpress.com/2019/10/ardr_final.pdf

Black Women's Suffrage: Harmful Language Statement
https://blackwomenssuffrage.dp.la/harmful-language-statement

The Language of Cataloguing: Deconstructing & Decolonizing Systems of Organization in Libraries
https://ojs.library.dal.ca/djim/article/view/7853

Disrupting Whiteness in Libraries and Librarianship: A Reading List
https://www.library.wisc.edu/gwslibrarian/bibliographies/disrupting-whiteness-in-libraries/

NMAAHC's Talking About Race
https://nmaahc.si.edu/learn/talking-about-race/topics/whiteness

Conscious Editing of Archival Description at UNC-Chapel Hill
http://www.ncarchivists.org/wp-content/uploads/2020/02/jsnca_vol16_dean.pdf

26

Appendix M: E-Rate in Virginia

VIRGINIA LIBRARIES

OUTCOMES REPORT 2019-2020
(E-RATE FUNDING YEAR 2020-2021)

LIBRARY
OF VIRGINIA

E-RATE CENTRAL
—SIMPLIFYING E-RATE—

Virginia Libraries Outcomes Report 2019-2020
(E-rate Funding Year 2020-2021)

70 Libraries Participated in E-rate

$2.4M In Pre-Discount Amount Requested

$1.5M In Post-Discount Amount Requested

97 Applications Filed

E-RATE CENTRAL
—SIMPLIFYING E-RATE—

VALibraries@e-ratecentral.com
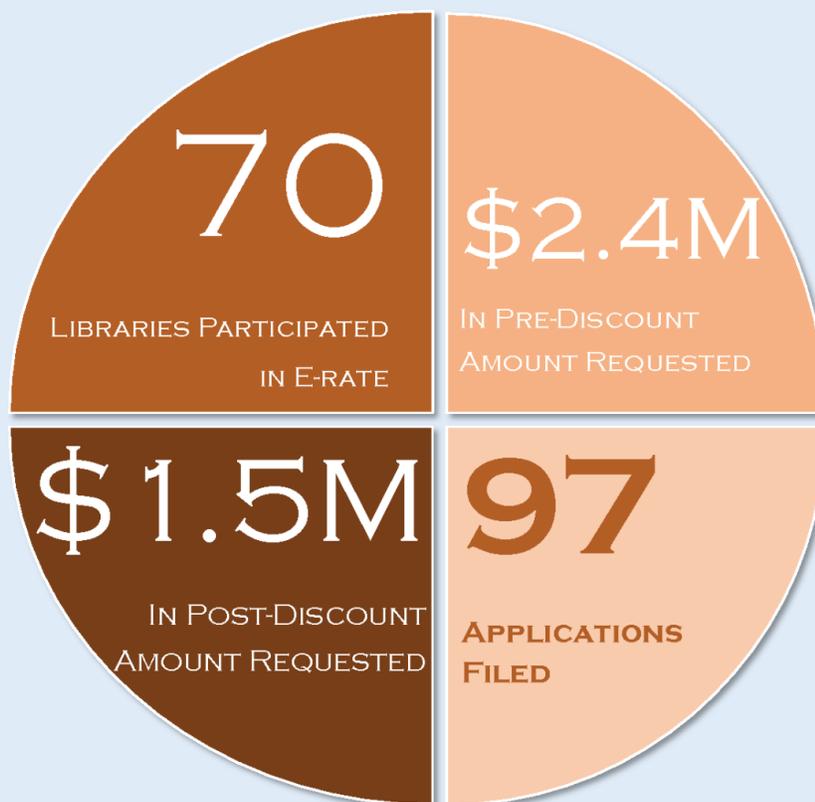
LIBRARY OF VIRGINIA

VIRGINIA LIBRARIES
OUTCOMES REPORT 2019-2020
(E-RATE FUNDING YEAR 2020-2021)

FY 2020 – 21 Funding By Category of Service			
Data Transmission and/or Internet Access	Internal Connections	Managed Internal Broadband Services	Basic Maintenance of Internal Connections
$1,466,810.00	$78,550.00	$14,108.00	$1,047.00

DATA TRANSMISSION AND/OR INTERNET ACCESS

$1,749,348.00 — 2017

$1,595,447.00 — 2018

$1,647,226.00 — 2019

$1,466,810.00 — 2020
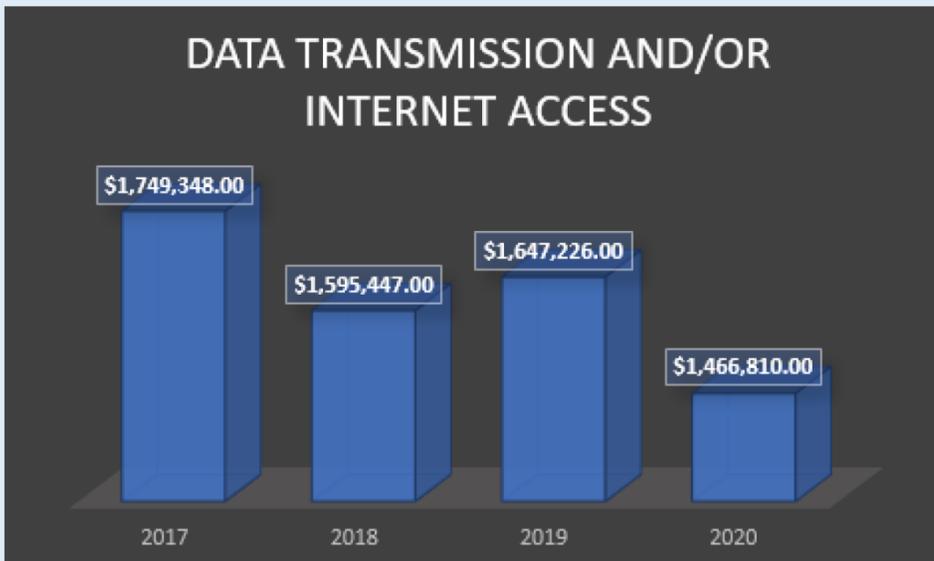
Internet and WAN costs per Mbps are decreasing as fiber-optic availability increases.
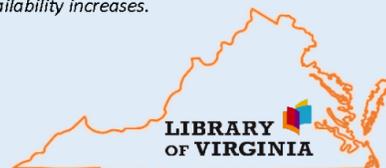
E-RATE CENTRAL
—SIMPLIFYING E-RATE—

VALibraries@e-ratecentral.com

LIBRARY of VIRGINIA

Virginia Libraries
Outcomes Report 2019-2020
(E-rate Funding Year 2020-2021)

Library Participants

70 — 2017
72 — 2018
74 — 2019
70 — 2020

2018 through 2020 Funding

$3,402,553.15 — 2018 Pre-Discount Amt
$2,466,187.85 — 2018 Discounted Amt
$3,561,778.67 — 2019 Pre-Discount Amt
$2,392,854.64 — 2019 Discounted Amt
$2,454,328.49 — 2020 Pre-Discount Amt
$1,767,328.33 — 2020 Discounted Amt

Pre-Discount Amt   Discounted Amt

E-RATE CENTRAL
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LIBRARY of VIRGINIA
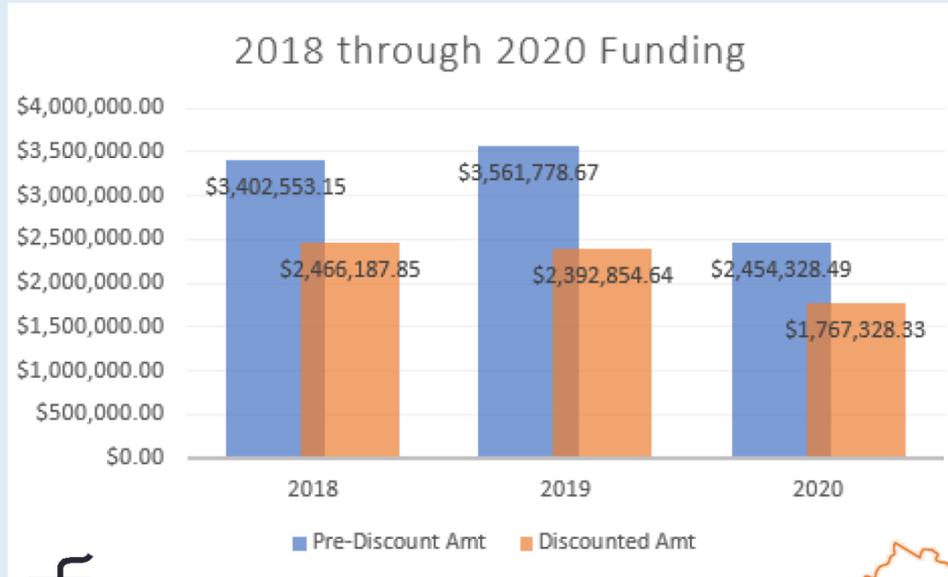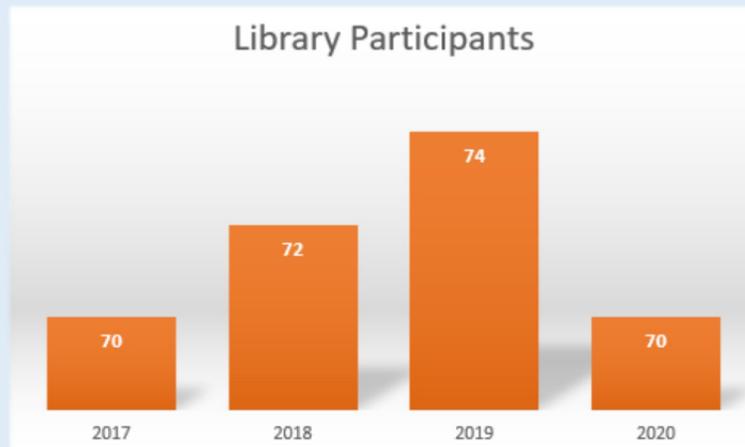
Virginia Libraries
Outcomes Report 2019-2020
(E-rate Funding Year 2020-2021)

Funding Comparison

2017 to 2020

2017 through 2020 Comparison: PRE-DISCOUNTED AMOUNTS						
FUNDING YEAR	Data Transmission and/or Internet Access	Internal Connections	Managed Internal Broadband Services	Basic Maintenance of Internal Connections	Voice	Grand Total
2017	$2,442,778.56	$470,729.16	$49,133.40	$12,400.00	$445,957.17	$3,420,998.29
2018	$2,155,041.51	$335,407.59	$23,690.04	$2,647.80	$154,827.72	$2,671,614.66
2019	$2,371,986.41	$1,366,123.78	$50,200.68	$2,010.43	n/a	$3,790,321.30
2020	$2,051,355.17	$104,770.68	$20,880.96	$1,310.24	n/a	$2,178,317.05
Grand Total	$9,021,161.65	$2,277,031.21	$143,905.08	$18,368.47	$600,784.89	$12,061,251.30

2017 through 2020 Comparison: COMMITTED E-RATE AMOUNTS						
FUNDING YEAR	Data Transmission and/or Internet Access	Internal Connections	Managed Internal Broadband Services	Basic Maintenance of Internal Connections	Voice	Grand Total
2017	$1,734,744.25	$350,254.24	$39,587.25	$0.00	$95,896.91	$2,220,482.65
2018	$1,561,234.12	$263,624.23	$16,583.03	$2,191.72	$15,482.76	$1,859,115.86
2019	$1,647,226.14	$847,795.42	$39,281.07	$1,647.38	n/a	$2,535,950.01
2020	$1,466,810.42	$48,550.14	$14,107.78	$1,047.29	n/a	$1,530,515.63
Grand Total	$6,410,014.93	$1,510,224.03	$109,559.13	$4,886.39	$111,379.67	$8,146,064.15

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