

CALIFORNIA STATE LIBRARY
LIBRARY SERVICES AND TECHNOLOGY ACT (LSTA)
FISCAL YEAR 2017/2018
STATEWIDE GRANT APPLICATION

ELEMENT 1: BASIC INFORMATION (please see application instructions for additional information)

Applicant Information

- | | |
|--|-------------------------------------|
| 1. Library/Organization | 2. Library's DUNS Number |
| | 135909930 |
| 3. Legal Business Name <i>(must match name registered with Federal Employer Identification Number (FEIN))</i> | |
| Califa Group | |
| 4. Project Coordinator Name | 5. Project Coordinator Title |
| Eileen O'Shea | Consultant |
| 6. Email Address | 7. Business Phone Number |
| eileen@infopeople.org | 562-856-4750 |
| 8. Mailing Address | City State Zip |
| 2471 Flores St. | San Mateo CA 94403 |

Project Information

- 9. Project Title** Infopeople
- 10. LSTA Funds Requested** \$398,948
- 11. Cash Match & In-Kind** \$370,316
- 12. Total Project Cost** \$769,264
- 13. California's LSTA Goals** *(Check one goal that best describes the project)*
- | | |
|---|--|
| <input type="checkbox"/> Literate California | <input type="checkbox"/> Bridging the Digital Divide |
| <input checked="" type="checkbox"/> 21 st Century Skills | <input type="checkbox"/> Information Connections |
| <input type="checkbox"/> 22 nd Century Tools | <input type="checkbox"/> Community Connections |
| <input type="checkbox"/> Content Creation/Preservation | <input type="checkbox"/> Ensuring Library Access for All |
- 14. Primary Audience for project** *(Select all that apply.)*
- | | |
|---|---|
| <input type="checkbox"/> Adults | <input type="checkbox"/> Pre-School Children |
| <input type="checkbox"/> Families | <input type="checkbox"/> Rural Populations |
| <input type="checkbox"/> Immigrants/Refugees | <input type="checkbox"/> School Age Children |
| <input type="checkbox"/> Intergenerational Groups (Excluding Families) | <input type="checkbox"/> Senior Citizens |
| <input checked="" type="checkbox"/> Library Staff, Volunteers and/or Trustees | <input type="checkbox"/> Statewide Public |
| <input type="checkbox"/> Low Income | <input type="checkbox"/> Suburban Populations |
| <input type="checkbox"/> Non/Limited English Speaking Persons | <input type="checkbox"/> Unemployed |
| <input type="checkbox"/> People with Disabilities | <input type="checkbox"/> Urban Populations |
| <input type="checkbox"/> People with Limited Functional Literacy | <input type="checkbox"/> Young Adults and Teens |

ELEMENT 2: PROJECT BACKGROUND AND SUMMARY

Describe how this project was identified as a need, how it relates to your library's strategic plan, what will be accomplished if this project is implemented, and how you will know whether your project is successful. Summary should relate to activities in the timeline (Element 4) and include statistical information to support the project.

Background: According to the American Library Association "For librarians, continuous learning is critical to renewing the expertise and skills needed to teach and assist members of the public in the new information age." Continuing education provides library staff the best and often only way to gain the practical workplace skills they need to meet the constantly changing needs of their communities. Infopeople provides subsidized continuing education/professional development opportunities that address the critical need for library staff to gain new knowledge and develop the critical thinking skills necessary to best assist the communities they serve. Infopeople also supports statewide library initiatives, develops and shares resources and original web content, and facilitates communication among libraries. The mission of the Infopeople Project, identified by the Advisory Board (Element 7, Attachment #1), is "to improve the quality of life of the people of California by upgrading the performance and effectiveness of California libraries," and the goal of the Project is "to provide the California library community with the skills, tools, and resources needed to deliver high-quality service in a rapidly changing world."

Infopeople develops its continuing education program after an annual needs assessment that utilizes a variety of analytical tools. This year's proposed program uses data from online surveys, telephone interviews and online focus groups conducted in February-April 2017. (Element 7, Attachment #2). Additional information was gathered from over 1,200 user evaluations of courses offered in 2016/2017, by input from instructors, Infopeople and Califa Advisory Board members and from website feedback. The 2017 needs assessment report identified the following areas of greatest need and interest for training: communication, technology, programming, marketing/publicity, youth services, collection development and management, management/supervision, and data (collecting, analyzing and using it). The Infopeople training calendar developed for 2017/2018 addresses these topics as well as California State Library priorities including citizenship, immigration, and mental health in both online courses and webinars planned for 2017/2018.

Summary: The 2017-18 Infopeople work plan contains the following components: a broad-based continuing education program that addresses needs identified by Infopeople with direction from the State Library. The program will include: 15 live one-hour webinars, 42 instructor-led asynchronous online courses (Element 7, Attachment #3), screencasts and podcasts; the development of a marketing plan that will help Infopeople reach new markets and increase its visibility in the worlds of continuing education and professional development (please note that fees charged for online courses will pay for this effort – no LSTA funding will be used); free seats in online courses for rural library staff. Additional support for California State Library initiatives will include hosting of discussion lists and production (for a cost recovery fee) of webinars for state initiatives and projects on an as needed basis.

ELEMENT 3: PARTNERSHIPS

Please list all formal partners for your project here. Please attach (under Element 7) a copy of your signed agreement with each partner, which outlines the role the partner will play and the resources the partner will contribute.

Partner Name	Organization Type (see instructions for valid entries)	Legal Type (see instructions for valid entries)	Role on Project	Resources That Partner Will Contribute (materials/funds/staff)

ELEMENT 4: PLANNING AND EVALUATION

Please answer each area concisely and completely. For section A-F limit responses to four pages.

A. Project Intent *(Check only one that best describes the project)*

Lifelong Learning

- ☐ Improve users' formal education
- ☐ Improve users' general knowledge and skills

Information Access

- ☐ Improve users' ability to discover information
- ☐ Improve users' ability to obtain information resources

Institutional Capacity

- ☒ Improve the library workforce
- ☐ Improve the library's physical and technology infrastructure
- ☐ Improve library's operations

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

- ☐ 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

Civic engagement

- ☐ Improve users' ability to participate in their community
- ☐ Improve users' ability to participate in community conversation around topics of concern

B. Project Purpose – Short statement which answers the questions: we will do what, for whom, for what expected benefit(s).

Infopeople provides subsidized continuing education/professional development opportunities that address the critical need for library staff to gain new knowledge and develop the critical thinking skills necessary to best assist the communities they serve. Infopeople also supports statewide library projects, develops and shares resources and original web content, and facilitates communication among libraries. Benefits to learners include documented improvement in library services as a result of training, initiation of new library services, creation of extensive and publicly available online resources, and leadership in library applications of new services and technologies.

C. Anticipated Project Outputs – Measures of services and/or products to be created/provided.

- In 2017/18, Infopeople will create and deliver over 55 continuing education events including 42 online courses (instructor-led asynchronous, live online, and blended), and 15 live webinars and an equal number of archived webinars.
- Infopeople will provide over 50 hours of support for California State Library initiatives, which will include support for several discussion lists and hosting of webinars as requested for a cost recovery fee.
- Over 4,000 learners will participate in open registration online courses and live webinars during 2017-2018.
- Over 200 rural library staff in California will participate in fully subsidized online training during 2017-2018 at an estimated value of \$30,000.
- The Infopeople website will be accessed over 600,000 times.
- A marketing plan funded by fees from online courses will help guide Infopeople's efforts in finding new markets and increasing awareness of its offerings.

D. Anticipated Project Outcome(s) – What change is expected in the target audience's skills, knowledge, behavior, attitude, and/or status/life condition? How will you measure these outcomes? (for examples see attachment B of the application instructions)

Outcome 1: 85% of participants in Infopeople learning opportunities will report an increase their knowledge and skills in library services and technologies to better serve the needs of their communities.

Outcome 2: After participation on Infopeople learning opportunities, 90% of CA library participants will demonstrate increased success in application of new technologies and creation of publicly available online resources that can be used by community members.

Outcomes will be measured by using outcomes-based surveys that will be completed by learners immediately after finishing a course. Follow-up surveys will also be sent via email to learners in selected courses three months after a course has ended, in order to measure changes in behaviors and practice. Over 2,000 evaluations will be collected at the end of online courses and live webinars during 2017/2018. (Element 7, Attachment #4).

E. Briefly describe how this project will be financially supported in the future.

Infopeople has been supported in large part by LSTA funding, but that funding has been reduced over the past few years. Currently, revenue is generated by user participation in online training events, and from cash match contributions from organizations that utilize our services and from occasional special grants. In 2017/2018 Infopeople will actively explore ideas for partnerships and increased revenue generation. These ideas include: increasing the number of organizations that purchase bulk seats and/or set up deposit accounts; marketing course offerings to new audiences; exploring partnerships with other organizations; adjusting and increasing fees charged for training; and offering Infopeople expertise in webinar production and online learning as contracted services. Infopeople also is continuing to lower operating costs through reducing the number of contract consultants involved in the project. (Element 7 Attachment #5).

F. Activity Information. Activities are action(s) through which the intent or objective of a project are accomplished. Four activity types have been identified, each with select methods to help you describe how you will carry out this project. Indicate activity types that require a significant commitment of resources to the project (representing 10% or more of total project resources).

1. ☐ **Instruction** - Involves an interaction for knowledge or skill transfer and how learning is delivered or experienced. *(Check all that apply and provide a description including whether the format will be in-person, virtual, or both)*
 - ☒ Program - Formal interaction and active user engagement (e.g., a class on computer skills).
 - ☒ Presentation - Formal interaction and passive user engagement (e.g., an author's talk),
 - ☒ Consultation - Informal interaction with an individual or group of individuals (library staff or other professional) who provide expert advice or reference services to individuals, units, or organizations.
 - ☐ Other

Description: The primary component of the Infopeople grant for 2017/2018 is a comprehensive continuing education program for all levels of library staff. This program is developed after analyzing information from needs assessment surveys and feedback from focus groups (Element 6, Attachment #2), as well as consultation with the Infopeople Advisory Board and the California State Library. Infopeople will provide over 50 learning opportunities in 2017/2018. 42 online courses are planned for this year; 15 will be new, as shown in Element 7, Attachment #3. 15 live one-hour webinars will be presented and all webinar content will also be converted to podcast format. Library best practices and expert training strategies will be shared through the Infopeople website, Twitter account, and Facebook page. Infopeople will provide over 50 hours of support to organizations and State Library Initiatives by producing live webinars for a cost recovery fee and hosting several discussion lists. Infopeople will share best practices and training models with library support organizations such as CLA, State Libraries, and library consortiums.

2. ☒ **Content** - Involves the acquisition, development, or transfer of information and how information is made accessible. *(Check all that apply and provide a description including whether the format will be physical, digital, or both)*

- ☐ Acquisition - Selecting, ordering, and receiving materials for library or archival collections by purchase, exchange, or gift, which may include budgeting and negotiating with outside agencies (i.e. publishers, vendors) to obtain resources. May also include procuring software or hardware for the purposes of storing and/or retrieving information or enabling the act of experiencing, manipulating, or otherwise interacting with an information resource.
- ☒ Creation - Design or production of an information tool or resource (e.g., digital objects, curricula, manuals). Includes digitization or the process of converting data to digital format for processing by a computer.
- ☐ Description - Apply standardized descriptive information and/or apply such information in a standardized format to items or groups of items in a collection for purposes of intellectual control, organization, and retrieval.
- ☐ Lending - Provision of a library's resources and collections through the circulation of materials (general circulation, reserves). May also refer to the physical or electronic delivery of documents from a library collection to the residence or place of business of a library user, upon request.
- ☐ Preservation - Effort that extends the life or use life of a living or non-living collection, the individual items or entities included in a collection, or a structure, building or site by reducing the likelihood or speed of deterioration.
- ☐ Other

Description: Infopeople will create original course content for 15 new online courses and 15 webinars during 2017/2018. Additionally, new content will continue to be added to the Infopeople blog on topics of current interest to library staff.

3. ☐ **Planning & Evaluation** - Involves design, development, or assessment of operations, services, or resources and when information is collected, analyzed, and/or disseminated. *(Check all that apply and provide a description including whether the format will be in-house or third-party)*
- ☐ Retrospective - Research effort that involves historical assessments of the condition of a project, program, service, operation, resource and/or user group.
 - ☐ Prospective - Research effort that projects or forecasts a future condition of a project, program, service, operation, resource, and/or user group.

Description:

4. ☐ **Procurement** – May only be used for projects with an Institutional Capacity Intent. Acquiring or leasing facilities; purchasing equipment/supplies, hardware/software, or other materials (not content) that support general library infrastructure. *(Provide a description)*

Description:

ELEMENT 5: GRANT TIMELINE/ACTIVITIES

Show each major project activity and when it will be started and/or completed throughout the project. The timeline should correspond to the activities described in Planning and Evaluation. Please put an X in each pertaining month.

Activity	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
Develop work plans for ongoing consultants	X													
Contract with ongoing consultants	X													
Produce and distribute calendar of planned CE events for FY	X													
Identify and recruit instructors	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Schedule and announce CE events	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Provide mentoring and assistance to instructors	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Provide instructional design for online courses	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Conduct instructor-led online courses	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Evaluate instructor-led online courses	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Post selected materials from online courses on website	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Deliver Infopeople webinars	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Evaluate Infopeople webinars	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Archive webinars and make available through website	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Maintain Infopeople registration system & website	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Produce regular content for Infopeople blog	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Update social media presence (Twitter, Facebook)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Renegotiate/renew contracts with technology vendors	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Conduct annual needs assessment								X	X	X				
Collect, compile, interpret statistical/evaluative data	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Submit reports to the State Library	X						X							
Advisory Board meets			X								X			
Prepare Infopeople training reports for libraries as requested	X	X	X	X	X	X	X	X	X	X	X	X	X	X

ELEMENT6: BUDGET

The budget should clearly identify the amounts requested and from what sources.

Budget Category	LSTA	Cash Match & In-Kind	Total
Salaries/Wages/Benefits			
Infopeople Advisory Board	\$0	\$7,020	\$7,020
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
Subtotal	\$0	\$7,020	\$7,020
<p>Description: Infopeople does not use any LSTA funds for salaried employees. All activities are carried out by independent contract consultants who are hired based on specific areas of expertise and receive no benefits.</p> <p>In-kind support for Infopeople is provided by the Advisory Board. The Advisory Board consists of 9 members, who are library directors or assistant directors broadly representative of the California library community. They each spend an estimated 10 hours per year on meetings (in-person and virtual) to support the project for a total of 90 hours. The average hourly salary for Board members is calculated at \$60, plus 30% for benefits, for a total of \$78 per hour.</p>			
Consultant Fees			
Webinar Presenters	\$11,250	\$0	\$11,250
Instructors	\$39,450	\$81,000	\$120,450
Instructional design consultants	\$245,050	\$66,000	\$311,050
Infopeople project consultants	\$50,000	\$31,000	\$81,000
Califa consultants	\$0	\$83,096	\$83,096
Marketing consultant	\$0	\$50,000	\$50,000
	\$0	\$0	\$0
Subtotal	\$345,750	\$311,096	\$656,846
<p>Description: Paid webinar presenters receive \$750 per webinar. Instructor fees range from \$2,350 for recurring online courses to \$4,000 for development and delivery of a new 4-week course. In 2017/2018 15 new online courses and 27 recurring courses are planned (Element 7, Attachment #3). All webinar presenters and online instructors are contract consultants (Element 7, Attachment #7). The Instructional Design consultants are: one Training Coordinator, 2 instructional designers and one online tech support person. They recruit presenters and instructors, develop courses and provide support for all courses and webinars (Element 7, Attachment #6). Two Infopeople project consultants provide administrative support for the project and maintain the website. Califa staff will contribute \$83,096 in in-kind project support (Element 7, Attachment #6). \$50,000 in cash revenue (no LSTA funds) will be used to hire a marketing consultant to help reach out to new markets and increase Infopeople's revenue stream to help offset the reduction in LSTA grant funding.</p>			

Budget Category	LSTA	Cash Match & In-Kind	Total
Travel			
Infopeople Project consultant travel	\$0	\$40,000	\$40,000
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
Subtotal	\$0	\$40,000	\$40,000
Description: Covers costs for Project consultants to attend events that will include the California Library Association's annual conference, ALA's mid-year and annual conferences and other state and national library events. All travel costs will be paid using revenue. No LSTA funds will be used.			
Supplies/Materials			
General office supplies	\$0	\$500	\$500
Postage/shipping	\$0	\$1,000	\$1,000
Photocopy/printing	\$0	\$700	\$700
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
Subtotal	\$0	\$2,200	\$2,200
Description: Costs for general office supplies support training activities. These costs have declined because of more efficient and less costly office equipment and the fact that Infopeople is doing no on-ground training or event management in 2017/18. Postage/shipping is based on 2016/17 costs. Photocopy/printing costs based on 2016/17 costs. All of these costs will be covered using revenue, not LSTA grant funds.			

Budget Category	LSTA	Cash Match & In-Kind	Total
Equipment (\$5,000 or more per unit)			
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
Subtotal	\$0	\$0	\$0
Description:			
Services			
Technology vendors	\$16,930	\$10,000	\$26,930
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
Subtotal	\$16,930	\$10,000	\$26,930
Description: Infopeople annually contracts with a variety of technology vendors to provide services including server space & support, registration system, webinar hosting, media storage, a learning management system, discussion list management, closed captioning for webinars, and online surveys. All services apply directly to management of online courses and webinars. The current list of vendors with costs for each is detailed in Element 7, Attachment #8.			

Project Total	\$362,680	\$370,316	\$732,996
Indirect Cost Rate Applied 10.0 % Indirect Cost	\$36,268	\$0	\$36,268
Check one: <input type="checkbox"/> No Indirect <input type="checkbox"/> Federally negotiated indirect cost rate * <input type="checkbox"/> Indirect proposed cost rate * * please attach supporting documentation if required			
Description: The Infopeople grant is administered by the Califa Group which acts as its fiscal agent and manages all grant funds and contracts.			
Grand Total	\$398,948	\$370,316	\$769,264

ELEMENT 7: ATTACHMENTS

If you have additional resources that support your grant, please attach after this page

ELEMENT 8: INTERNET CERTIFICATION

Check the Appropriate Library Type

☐ Public Library ☐ Academic ☐ K-12 ☐ Multi-Type ☒ Special/Other

As the duly authorized representative of the applicant public library, public elementary school library or public secondary school library applying for LSTA funding, I hereby certify that the library is (*check only one of the following boxes*)

A. ☐ **An individual applicant that is CIPA compliant.**

The applicant library, as a public library, a public elementary school library or public secondary school library, has complied with the requirements of Section 9134(f)(1) of the Library Services and Technology Act.

B. ☐ **Representing a group of applicants. Those applicants that are subject to CIPA requirements have certified they are CIPA compliant.**

All public libraries, public elementary school libraries, and public secondary school libraries, participating in the application have complied with the requirements of Section 9134(f)(1) of the Library Services and Technology Act. The library submitting this application has collected Internet Safety Certifications from all other applicants who are subject to CIPA requirements. The library will keep these certifications on file with other application materials, and if awarded funds, with other project records.

C. ☒ **Not Subject to CIPA Requirements.**

The CIPA requirements do not apply because no funds made available under this LSTA grant program will be used to purchase computers used to access the Internet or to pay for direct costs associated with accessing the Internet.

SIGNATURE

I have read and support this LSTA Grant Application.

Califa Group

Library/Organization

Infopeople

Project Name

Paula McKinnon

Library Director Name

Interim Director

Title

Library Director Signature

Date

ELEMENT 7: ATTACHMENTS

Attachment 1: Infopeople Advisory Board, 2017-2018

Attachment 2: Infopeople Training Needs Assessment 2017 Final Report

Attachment 3: Infopeople Planned Online Courses by Topic, 2017-2018

Attachment 4: Infopeople 2017-2018 Logic Models & Outcomes

Attachment 5: Infopeople Course Fee Changes for 2017/18

Attachment 6: Infopeople Contract Consultants, 2017-2018

Attachment 7: Infopeople Instructors & Presenters, 2017-2018

Attachment 8: Infopeople Technology Vendors, 2017-2018

**ELEMENT 7, ATTACHMENT 1:
INFOPEOPLE ADVISORY BOARD
2017/2018**

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Infopeople Training Needs Assessment 2017

Final Report



Completed by Stephanie Gerding and Brenda Hough

February – April 2017

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INTRODUCTION

Infopeople contracted with Stephanie Gerding and Brenda Hough to conduct a 2017 Infopeople Library Training Needs Assessment. The key goals include: 1) identify priority training topics, 2) recommend areas for change and improvement, and 3) assess training needs for library staff and ways to meet those needs. This is the final report, describing methodology, recommendations, and analyzed summaries of all data sources.

METHODOLOGY

A multiple-source study was performed with data collection from Infopeople's primary constituencies, employing a multi-method design that included:

- Analysis of two online surveys
- Three online focus groups
- Telephone interviews
- Review of 2016 course evaluations
- Responses from the Infopeople website suggestion form.

The focus groups and interviews provided an opportunity to ask questions and probe topic areas to complement surveys conducted by Infopeople in March 2017. The use of this multi-method design and multiple sources provides data that is credible, convergent, and actionable.

SURVEYS

Two online surveys were administered during March 2017. The surveys were open from mid-March until the end of the month.

- 1) The General Training Needs Survey was promoted using several state and national library email lists (including Calibk12, Calix, CRL listserv, Ifptraining, LearnRT, PLSstaff dev, and PubLib) and the California Libraries group on Facebook. 317 responses were received.
- 2) The California Public Library Directors Survey was also distributed with 40 responses received.

FOCUS GROUPS

Three online focus groups were conducted with the following stakeholders:

1. **California Library Services Act (CLSA) System Administrators and Board Chairs**
(anonymous online focus group)

Four CLSA system chairs/administrators were able to participate in an anonymous 45-minute focus group on March 16, 2017.

2. **Califa's Board and Infopeople Advisory Board** (anonymous online focus group)

Four members of Califa's Board and Infopeople's Advisory Board participated in a 45-minute online focus group on March 16, 2017.

3. **Continuing Education (CE) Coordinators** (anonymous online focus group)

CE Coordinators from other State Library Agencies were invited to participate in an online focus group. Seven attended a 45-minute session on March 14, 2017. Eight states sent a yes RSVP, including: MT, OR, DE, TX, ME, CO, MO, and AZ.

Adobe Connect was used to conduct the three online focus group sessions. Participants responded via chat. Participants in the three groups were asked to keep their identities anonymous by using code names. Each focus group was asked the same set of questions, with a few variations depending on the target audience. The evaluators facilitated the sessions and created a flexible, open discussion and probed deeper into initial comments made by participants. Participants were also encouraged to respond to statements made by others.

INTERVIEWS

The evaluators conducted phone interviews with two deposit account holder representatives and a representative from an organization that has contracted with Infopeople for a customized course offering. In addition to asking the same questions that were asked in the focus groups, these individuals were also asked to share input regarding their experiences and opinions on deposit accounts and customized course offerings.

OTHER DATA SOURCES

Infopeople is continuously seeking input regarding training topics. Other input that has been collected was also used as data for this report. These included:

- **Infopeople Course Evaluation Input:** For every Infopeople course, learners complete an evaluation form, which solicits feedback about the course they are taking, and also solicits suggestions for future training they would like Infopeople to provide. For this assessment, evaluation forms from January 2016 – December 2016 were analyzed (38 courses).
- **Infopeople Website Suggestion Form:** On the Infopeople website, people are encouraged to share training suggestions. These suggestions were also reviewed as a data source.

RECOMMENDATIONS

The recommendations section of this report has been divided into two parts:

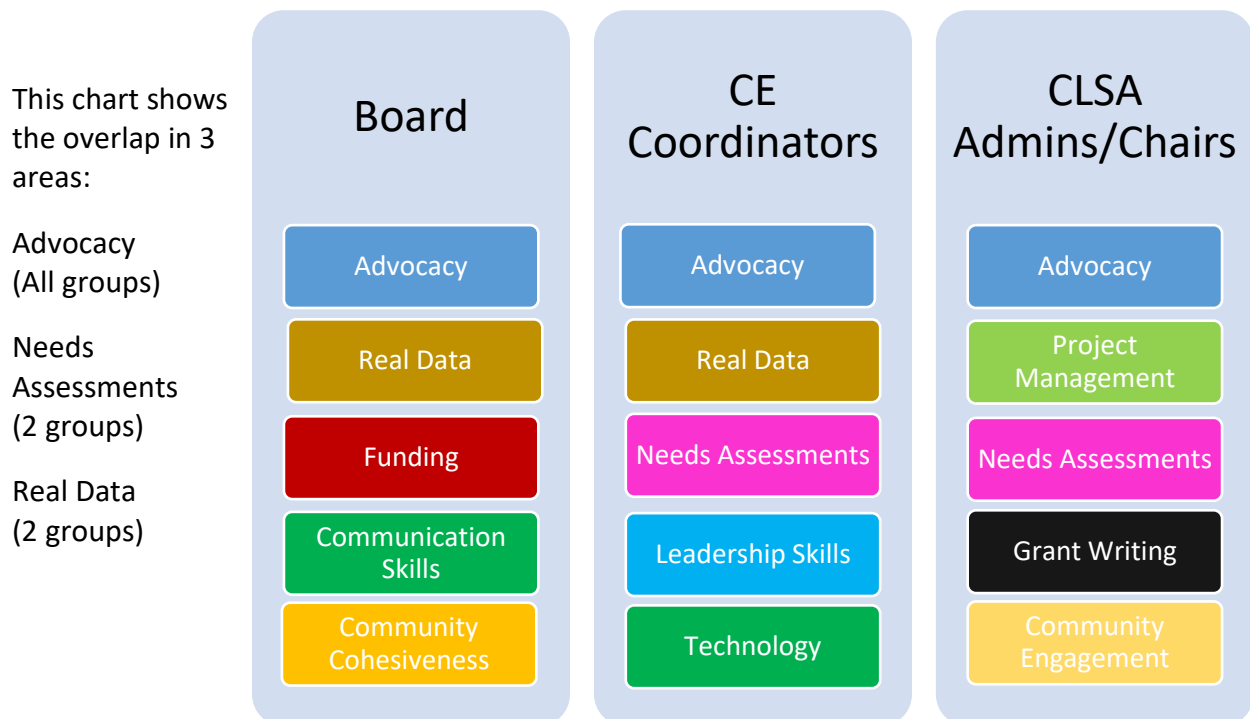
- 1) **Topics:** Priority training topics.
- 2) **Process:** Formats and delivery options for training, potential new services and resource offerings for Infopeople to consider, and more.

RECOMMENDATIONS: PRIORITY TRAINING TOPICS

In this section, we highlight the priority training topics that were identified during the focus groups, in the two surveys, and in Infopeople course evaluations.

Focus Group Priority Training Topics

Participants in the three online focus groups were asked to identify the topics most important to address in training.

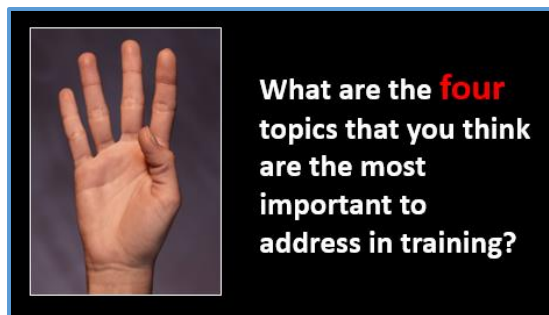


In the three online focus groups, participants shared the top four priority training topics for the next year. Summaries of each group's priority topics are below.

Advisory Board Focus Group Priority Topics

The 2017 top topics cited by the Infopeople advisory board were (listed in order of frequency):

- Advocacy, including community engagement and partnerships
- Funding, including managing budgets
- Building community cohesiveness, fostering diversity and inclusiveness in the workplace and addressing the needs of an increasingly diverse community
- Using real data, including addressing fake news
- Communication skills, including communicating the value of the library, making public presentations, and communication within the political arena



CE Coordinators Priority Topics

The 2017 top topics cited by the national Continuing Education Coordinator's group were (listed in order of frequency):

- Advocacy, community engagement and support; delivering elevator speeches, communicating value
- Technology; keeping up, online security/privacy, basic tech, troubleshooting, how to upgrade
- Transformational programs/services
- Growing leadership among staff (not just directors).
- Getting over STEM fear
- Using real data; data authenticity and use; addressing fake news
- Community Needs Assessment

"We introduce tech with the hope that local library staff will adopt and take over, but they keep expecting us to do it for them."

CLSA Administrators and Chairs Priority Topics

The 2017 top topics cited by the CLSA System Administrators and Chairs session were (listed in order of frequency):

- Training for directors and upper management (policy development, change management, budgeting)
- Project Management
- Community Engagement, outreach
- Advocacy and political skills
- Grant Writing
- Languages
- Community Assessment
- Strategic Planning
- Technology

Library Director Survey Priority Training Topics

In the survey of California library directors, respondents were asked an open-ended question: *"I would be willing to invest staff time in CE/PD that improves performance in the following area."*

- **Effective communication and customer service** was the topic area most frequently cited. 13 respondents specifically said "customer service" and 5 respondents listed "communication skills." Several respondents mentioned "conflict management" and "dealing with difficult situations." Several respondents specifically mentioned interactions with people who are experiencing homelessness and also people with mental health challenges. Skills for facilitating community conversations were mentioned, too.
- **Technology** was also frequently cited. 12 respondents listed "technology," with 3 specifically mentioning 3D printers and 2 mentioning technology troubleshooting.
- **Assessment** and **evaluation** topics were mentioned 7 times, including outcomes and assessment tools, data analysis, community assessment, performance measurements and evaluation methods.
- **Outreach, marketing, and promotion** were mentioned several times.
- **Trends** and **innovation** were mentioned several times, including "thinking outside the box."
- 7 respondents mentioned **supervisory** skills
- 7 mentioned **programming** topics, including "innovative programming ideas" and "programming ideas for middle school/teens" and "special population programming"
- 6 mentioned **collection** management
- 5 mentioned **project** management
- 4 mentioned community **engagement**
- 3 mentioned **grant** writing
- 3 mentioned **leadership**
- 2 mentioned **advocacy**
- 2 mentioned **readers' advisory**

Top Training Topic
Priorities cited by
Library Directors

Topics that received a single mention include: librarian values and ethics, non-traditional item checkouts, citizenship services, meeting room scheduling, privacy, copyright, budgeting (and aligning budgets with strategic plans), patron self-service, passport services or other revenue streams and education regarding LSTA rules/bylaws.

A follow-up question asked directors, "In your opinion, what are the top three CE/PD needs that, if met in the coming 12 months, would provide the greatest benefit to your library?" Responses to this question echoed the previous open-ended question, with a few additional

topics cited, including: teen services, citizenship services, “living and owning the vision”, analyzing demographics for service trends, cultural competencies – diversity, social media benefits, strategic planning, library space development, and volunteer enrichment.

General Training Needs Survey: Priority Topics

In the General Training Needs Survey of all types of library employees, 317 respondents indicated their interest in topics within fourteen general library training categories. They were encouraged to select as many topics as they’d like without the restraints of time or funding.

The five categories with the most interest were: **Community Outreach, Customer Service, Facilities Management, Interpersonal Skills, and Special Populations**. The topics most requested include:

- Community Engagement (78.14%),
- New Models of Customer Service (71.20%),
- Developing Partnerships (68.17%),
- Dealing with Difficult Situations (62.14%),
- Reconfiguring Spaces (61.89%),
- Keeping the Library Safe and Sane (61.81%),
- Conflict Resolution (61.29%),
- Dealing with Difficult Patrons (60.32%),
- Immigrants/New Citizens (56.07%),
- Communicating with Others (55.48%),
- Adult Programming (54.40%),
- Rethinking Reference (53.02%),
- Space Planning (53.75%),
- Tech Trends (52.12%)
- Teaching People to Use Technology (50.99%)
- Time Management (50.65%)



General Training Needs Survey: LSSC Priority Topics

In the General Training Needs Survey of all types of library employees, respondents were asked to indicate interest in topics for five categories of LSSC-approved courses, ranked below.

1. **Technology**; 136 respondents (56%) were interested or very interested in this topic

2. **Supervision and Management;** 114 respondents (47%) were interested or very interested in this topic
3. **Collections;** 101 respondents (42%) were interested or very interested in this topic
4. **Access Services;** 87 respondents (37%) were interested or very interested in this topic
5. **Foundations of Library Services;** 84 respondents (36%) were interested or very interested in this topic

Infopeople Course Topic Input

For every Infopeople course, learners complete an evaluation form, which solicits feedback about the course they are taking, and also solicits suggestions for future training they would like Infopeople to provide. For this assessment, evaluation forms from January 2016 – December 2016 were analyzed (38 courses).

Commonly mentioned topics fell into several categories, including **communication, technology, programming, marketing/publicity, youth services, collection development and management, management/supervision, and data**. Topic requests are categorized and listed below, with unique specific examples included.

- **Alternative Funding:** Grant writing. Fundraising.
- **Collection Development and Management:** Materials selection. Weeding. Adult non-fiction. Using social media for collection development. Book repair.
- **Communication:** Public speaking. Bias free/culturally effective communication in the 21st century library. Listening skills. Intercultural communication. How to Positively Communicate in the Work Place as a Supervisor. Conflict resolution. Dealing with difficult people. Dealing with conflict. The Wakanheza Project.
- **Community Engagement:** Ways to network with the community and local business. Community Outreach. Community engagement. Community outreach strategies / how to get out of the building and into your community
- **Data – Collecting, Analyzing, and Using It:** Using data to make decisions. How to conduct focus groups. Conducting community scans; How to develop programming that meets the needs and interest of your community; How to use statistics to improve library services and collections
- **Library as Place:** Library environment. How to create quiet spaces. How to control the library environment while allowing it to be an interactive community center where the community can enjoy their time at the library and each other. Safety and security. Responding to emergencies.
- **Library Maker Spaces:** 3D printers. Beyond 3D printers. Watching maker lessons in action. Actual maker projects.
- **Management/Supervision:** Writing job descriptions, Human resources pitfalls, Inclusion and diversity in the workplace, employee counselling. Evaluation of Staff. Working

through Difficult Situations with Staff. How to have difficult conversations with employees. How to interview potential employees. Performance goals. Evaluations. Employee coaching. Managing a budget – for a project or for an organization. Creating and managing policies and procedures. Workplace diversity. Managing a multigenerational workplace. Delegation. Decision making.

- **Marketing and Publicity:** Social media. Social marketing. Blogging. Effective Library Marketing to Middle-Aged Adults and Seniors (or any non-tech savvy group). Graphic design. Ways to market other than social media. Writing for the web/social media. Marketing on a limited budget.
- **Meeting the Diverse Needs of Communities:** selecting resources and attending to diverse ethnic communities. Meeting needs of ESL community. Reaching out to the elderly population. Respecting and serving the LGBTQ community in our libraries. Meeting needs of people with disabilities (physical and cognitive). Serving children who have disabilities.
- **Programming:** Programming 101. Program development and marketing programs. Programming for various users and populations. Adult programming BESIDES book clubs. Innovative teen programs. Programs for Seniors or Older Adults. The Best way to provide DIY programs to communities. outcome measure in public library programming. Measuring meaningful impact of programs for underserved. families of LGBTQ. Ideas for adult programs. Creative adult programming. Tabletop gaming and game design. Programming for baby boomers. Marketing programs. Programming for 20 somethings. Programming for rural libraries. Literature and book based programming beyond childhood. Programming for new adults. Planning arts instruction workshops for adults. Passive programming. How to plan a summer reading program
- **Projects:** Planning, project management, time management, and evaluation
- **Readers Advisory:** Recommending books (tools to use for RA). Graphic novels for kids. Book talking. Introducing adults to reading. Integrating comic books into the collection.
- **Teamwork:** Negotiation and team building. Collaboration skills. Team building. Team dynamics.
- **Technology:** What are the new ways to better serve your communities? Being able to help people use technology. technology that makes libraries more accessible and inclusive, i.e. programs and devices oriented towards people with disabilities or programs that can help communities close the digital divide and provide citizens with information and opportunities that they might not otherwise have due to income or geography. Introducing the elderly to technology. Mobile devices. Robotics in the library. YouTube for Libraries. Using SharePoint in libraries as a communication, collaboration, and file management tool.
- **Youth Services:** More on teen services, maybe an in depth course on teen collection development, teen outreach, teen programming. Reader's Advisory for Teens. Advanced Teen Services. Tween Services. Resources every library should have for teens.

Introducing life skills to teens. Helping teens know the value of reading. Teen advisory boards. Marketing YA collections. Teens at the center of tech programs to lead tech programming or makerspaces. Children's services. Children's literature. Learning through play. Incorporating early literacy tips into storytime.

Other topics that were mentioned in course evaluations include:

- Strategic planning
- Instructional design
- Creating meaningful staff development opportunities
- Suicide prevention
- Cataloging
- Coordinating volunteers and engaging teen volunteers
- Time management
- Stress management
- Working successfully with Friends groups and foundations
- User Experience (UX)

RECOMMENDATIONS: PROCESS

In this section, we share recommendations and suggestions not related to training topics (which were covered in the previous section). Recommendations include the following:

- Webinars
- Training formats and methods
- Deposit accounts
- Communication
- Potential new Infopeople service and product offerings

In addition, because we believe it may be useful to Infopeople as they explore new directions, we've included responses to two open-ended questions asked of focus group attendees.

WEBINAR RECOMMENDATIONS

Infopeople offers regularly scheduled one-hour webinars on various topics of interest to the library community. In this section, recommendations and data related to webinars will be highlighted.

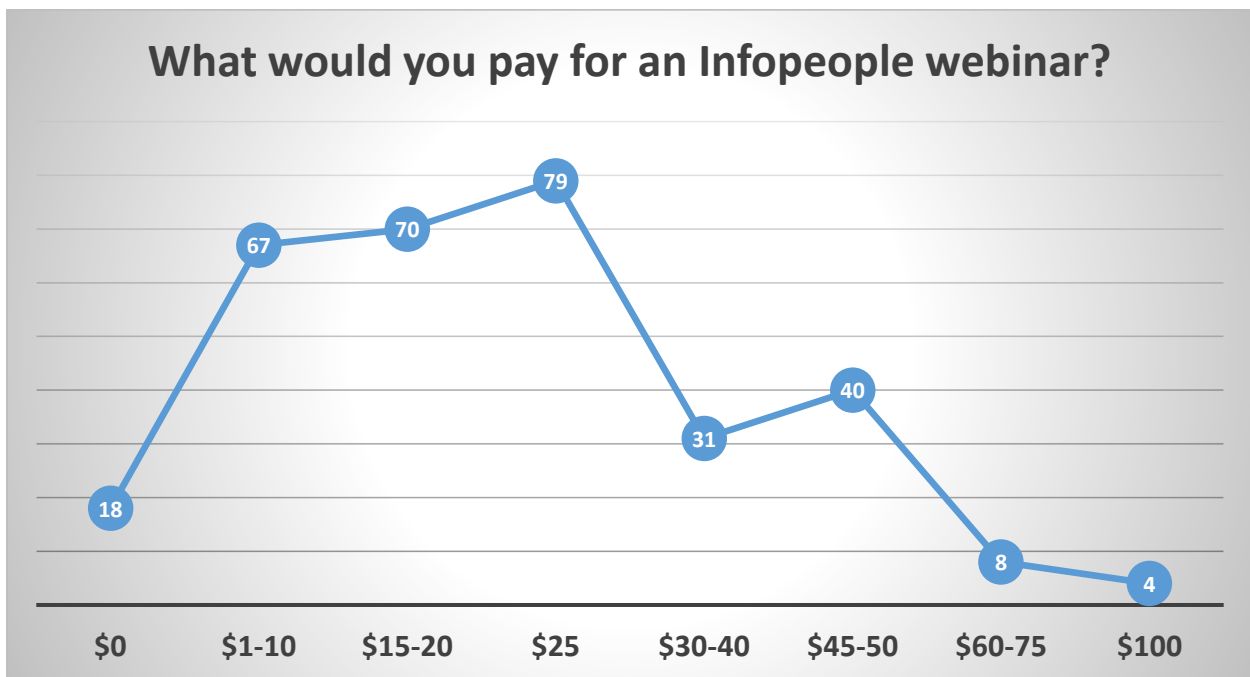
- **Recommendation: Provide Customized Webinars**
Offer on-demand webinars that can be held when groups meet. These could be repeats of live webinars so that an instructor could provide the same content, but with personalized interactivities with one group, such as a library or for a state.
- **Recommendation: Provide Webinar Series**
Offer webinar series as a way to provide more in-depth training, but in quick segments.

- **Recommendation: Consider Charging for Some Webinars**

While many in the library field are accustomed to one-hour webinars being free, there may be some circumstances in which people are willing to pay – for high quality and high demand webinar topics that are not available elsewhere.

As Infopeople moves to a self-sustaining, rather than grant funded model, it is necessary to consider the costs involved with webinars and how to recover those costs. In the past, Infopeople one-hour webinars have been free to attend. In the General Training Needs Survey and also in the focus groups, respondents were asked questions about webinars and fees.

317 people provided a response to the following open-ended question in the General Training Needs Survey, *“What do you feel is a fair and manageable fee to charge for attending a quality, instructor-paid, one-hour webinar?”* 18 people replied that would not pay, while 79 said they would pay \$25. All responses are reflected in the chart below with the number of respondents indicated in the blue circle.



BOARD

In the focus group with members of the Infopeople and Califa boards, all board members wanted a group rate to be offered as well as seat packages for volume discounts. Pricing suggestions ranged from \$25-\$50. They cited other sources charging for webinars and said they would pay for Infopeople webinars if easy to do so.

“Other organizations (ALA, PLA) charge a substantial amount for webinars that are not as good as Infopeople’s.”

"I would pay for the Infopeople ones if it was easy, convenient."

"I think perhaps you could bundle the webinar with a course, so if you attend a webinar on a topic, they could apply some of that charge to a course that goes deeper into that topic."

"I think easy is key, such as allowing a single login attached to a deposit account that then I could authorize multiple people to use without needing a separate charge; would help systems spend training money wisely."

STATE CE COORDINATORS

In the State CE Coordinators focus group, most preferred a library or statewide subscription for webinars. A sliding scale based on pop served or budget was appealing. Many agreed with the statement, *"The iTunes model of a smallish fee is probably sustainable. I think ALA's webinars, by contrast, are too expensive."*

"We pay for all/most profdev for library staff statewide - would be willing to pay a reasonable amount for the IP webinars - they're good value."

"It might be nice to have 1 free webinar per quarter? Some libraries will never be able to pay to attend training."

"Consider them good marketing for the courses. I don't pay for people to take webinars."

"If we had input on the topics and speakers, then we would be more willing to support the cost of a webinar."

"Most of our libraries don't have training budgets so we'd have to fund it at the state level which is problematic with IMLS in limbo. I would hope the cost would be low \$25-\$50 at most for an individual webinar."

"ALA webinars don't give us enough advanced notice."

"We wouldn't pay for individual staff to attend individual webinars here. If you wanted to capture our state, you would have to either offer the course/training specific to our state, or you would have to offer something like a 1 year pass, and we would purchase so many of those to distribute to library staff throughout the state."

SYSTEMS

Focus group members from Systems, who are Chairs or Executive Directors, were willing to pay for needed, quality, webinars, but preferred the cost to be low and the option for bulk purchasing.

“IFP already has great credibility. I am ok with charging, but should be low. Would also be good if an institution could purchase a bulk, like \$1000 and then let staff just charge against that so don't need to pay each time.”

“I think it really depends on the content. I'd pay more for something I can't readily get somewhere else.”

TRAINING FORMATS AND METHODS RECOMMENDATIONS

In addition to sharing topic suggestions, respondents also shared input regarding training formats and methods. Infopeople currently offers one hour webinars, 2-week self-paced instructor-led online courses, and 4-week self-paced instructor-led online courses. In online training course evaluations, learners frequently cite time challenges when trying to complete a two- or four-week course. Focus group participants were also asked about formats and their responses are summarized here.

- **Recommendation: Provide Bite-sized Training**
Continue to provide in-depth content but find ways to deliver it in “bite-sized” pieces.
- **Recommendation: Provide Customized Courses**
Provide customized course offerings for states or large systems. Allow a state to purchase a course that could be offered for their state. Instructors could provide the same content, but personalized to individual states.

BOARD MEMBERS

All board members agreed, “We need bite-sized, modular training that people can fit into busy and ever-changing schedules, e.g. webinars, independent self-paced learning.”

“I think all of the formats are of value, I think sometimes it varies by which topic and which learner”

“I refer staff to the webinars all the time for an introduction or update on a topic, those are great.”

“I think the longer courses are great for very layered or detailed topics”

STATE CE COORDINATORS

Most preferred Instructor-led courses and webinars. Comments are included here.

“Hard to get people to complete the courses. Webinars are really good for keeping up with trends. We struggle to get people to show up for more than an hour to anything, which is why I vote webinars first.”

“I think they're more inclined to complete if it's not self-paced.”

"I much prefer f2f training. But... the 4 week instructor led courses offer more depth."

"Self-paced over courses, because they can do them at any time. But I would like to see better content than what WebJunction offers... they are pretty shallow"

"Depends on staff size / budget at library. e.g. self-paced or free hour for smaller, longer courses for larger libraries."

"FREE webinars; until the federal budget settles down and we know how IMLS will fare, it's not possible to commit to online courses for a fee. I do like the idea of independent online learning".
"It's hard to complete something without a deadline."

SYSTEMS

Overall, system representatives preferred the webinars and self-paced online learning. They were interested in custom training.

"The webinars are fantastic as 'hit it and quit it' - I can get info really fast as an overview. Love that."

"Custom online courses sound interesting."

"I have done a 4-week course and thought it was really good - I could get a sense of what other people were doing."

"Independent Online Learning. I have audited MOOC courses and found them helpful so i think this model would work."

"Webinars work well for trainings applicable across classifications w/in the team that don't require much interaction. Instructor led is preferred for those trainings that are on more in depth topics, like those suggested for upper management."

DEPOSIT ACCOUNT RECOMMENDATIONS

Infopeople offers deposit accounts, which allow organizations to purchase course seats in advance. If the organization purchases a minimum quantity, they receive a discount.

Interviewees were asked about deposit accounts and focus group attendees were asked about deposit accounts, too. Feedback shows that the deposit account option is favorably viewed.

- **Recommendation: Promote Deposit Accounts**

Continue to offer deposit accounts, as they are well received, but as many indicated they weren't aware of this service, additional marketing is warranted.

- **Recommendation: Customize Deposit Account Reporting and Tracking**

May be necessary to accommodate special requests related to reporting and attendance tracking based upon an organization's requirements.

BOARD

"Needs vary depending on size/type of library or system. Smaller libraries can't afford custom training, but could really make use of the deposit accounts to manage budgets"

STATE CE COORDINATORS

"Reports for attendance/completion."

"I wasn't even aware of this option. great option!" (deposit accounts)

"We use the deposit accounts and are happy to be able to offer that service to our libraries."

"IP changed the way they handled it as of July 1 - the transition was a little bumpy, but the kinks have been worked out and it seems to be working well now."

"We would need something especially if we used LSTA money to buy the seats."

"I wasn't aware of this option either. can you limit the seats to specific courses, etc?"

"It is a pain, though, that I have to do the sign-up for the individuals... we don't have a large staff."

"Reporting very important...didn't know deposit accounts were available to states"

"We have staff register with us, then we register them with IP, so we have control!"

SYSTEMS

"Probably most libraries don't know about the deposit accounts. love the idea"

"Yes!" (to deposit accounts)

"Would use." (deposit accounts)

"Might need to think about ensuring the funds are spent during that FY for accounting reasons." (deposit accounts)

COMMUNICATION RECOMMENDATIONS

During the focus groups and interviews, the researchers asked questions about communication from and with Infopeople, specifically seeking ideas for improvement.

- **Recommendation: Promote the Planned Training Calendar**

The consensus seems to be that Infopeople does a good job with promoting courses and webinars that will be offered soon (within a month or two). Several people mentioned wanting more notice of training opportunities. On their website, Infopeople does provide a planned training calendar, which is regularly updated and covers planned courses for the entire year. Regularly mention this calendar in communications to help heighten awareness that it exists.

- **Recommendation: Provide Regular Communications with Stakeholders**

Provide regular communication opportunities for two-way conversations with stakeholder groups. Continue to include focus groups and interviews as part of regular needs assessment activities. In every focus group, participants expressed appreciation

for being asked for their input. CLSA System Administrators and Chairs asked for regularly scheduled meetings.

- **Recommendation: Explore Adding Content to Training Announcements**

Continue to share course announcements via email. Also, consider a weekly or monthly email newsletter, which includes not only course and webinar announcements, but also training tips and resources.

BOARD

Input from the Califa and Infopeople board focus group regarding communication from Infopeople is included below.

"I like the upcoming courses emails with just three or four."

"Anything that puts fewer emails in my inbox is a plus"

"Make sure you are communicating with special libraries also, not just public."

"weekly newsletters would be great."

"Yes to weekly newsletters"

"CALIX is so cluttered that I think things get lost. Maybe we need an Infopeople listserv that people can opt in to."

"There is the training list, but mostly I get that then forward the emails to supervisors or individuals."

"I agree that people don't know about the separate infopeople mailing list."

"I think the listserv needs promotion."

"Could that list include other training topics, or a way to ask questions? Training topics, best book on this topic, best way to train on that topic, etc., Brand Infopeople as the go to source for training as a whole, not just their own."

"Like the idea of having it be a more robust training listserv - but would need wide promotion which might be hard."

Many said: *"I think regular reporting and analysis of InfoPeople offerings, satisfaction, attendance, etc for the Board is important - with recommendations, performance data."*

"Send periodic reminders of something that is already available, such as if news breaks in a certain area, a reminder that there may be a webinar on it already in the archive."

"A better way to search the webinar archive by topic, I just have to think I remember a topic, then go browse for it."

"Maybe a more consolidated communication like a newsletter periodically - that talks about upcoming training, highlights topical archived webinars, shares "best practices" about how other libraries are approaching training."

"How about a training practices area, so trainers can work with each other?"

STATE CE COORDINATORS

They find out about Infopeople training through emails from Gini Ambrosino, the national CE list of free webinars from Wyoming, Webjunction listings, Learning RT email list, and the Infopeople website.

POTENTIAL NEW INFOPEOPLE OFFERINGS RECOMMENDATIONS

In addition to courses and webinars, Infopeople is considering a number of additional services to offer to libraries and library organizations. Focus group participants and interviewees were asked to comment on these ideas.

Recommendation: Offer Customized Assessments

Consider contracting with organizations to provide customized training needs assessments and skills assessments.

Recommendation: Offer Customized Preconferences

Consider contracting with organizations to provide customized half-day or full-day in-person workshops for preconferences or staff training days.

Recommendation: Explore Providing Certifications

Although feedback did not provide definitive answers regarding certification options, there was positive feedback about the possibility. Infopeople may want to explore this option with follow-up research.

BOARD

Most said all new offering suggestions would be welcome. *“Pre-conferences are a good way for me to leverage conference attendance.” “Custom webinars and courses could be an opportunity for the CSLA systems, state libraries, library associations etc. to develop and offer training under their brand - kind of like private labelling in supermarkets.”*

STATE CE COORDINATORS

All attendees expressed positive feelings about custom webinars. Four were very excited about Infopeople providing training needs assessment services and added, “Some larger systems might be interested in their own training needs assessment.” Two said they would be interested in a statewide competencies self-assessment tool. “I would be interested in a SKILLS assessment tool for library staff and could possibly pay for that.” Four were interested in contracting with Infopeople for ½ day pre-conferences. There was also interest in a certification program with one attendee noting that the, “CONTEd Forum group looking at recognizing each other's certification programs.”

SYSTEMS

Custom webinars were a popular option. There was excitement about the Needs Assessment offering, “I think that could be huge!”

Preconferences were wanted, “ Almost every library has staff development days and would really be interested I think in having this type of training.”

Two loved the idea of developing a new Credential System and courses. Someone also said, “just to throw it out, but I really like what Infopeople was doing 5-6 years ago. Infopeople was the only game in town for training and it was really in-person focused on a very local level -- there was a connection there that I no longer get with infopeople.” “Yes, there are no more in-person trainings, like for cataloging. That was good. Maybe you could offer that as a boutique service.”

INPUT: HOW ELSE COULD INFOPEOPLE SUPPORT LIBRARY LEARNING NEEDS?

As a follow-up to the questions Gerding and Hough asked focus group attendees about potential new offerings, attendees were asked to respond to the question, “How else could Infopeople support library learning needs?” Responses are highlighted here.

BOARD

“Provide training packages (outlines, slides, materials) that could be delivered in house. We have just had a good experience with this type of approach for “Safe Zone” training.”

STATE CE COORDINATORS

“I bid out 24 webinars a year. It's a pain. If there were some way to contract to bid out the 24 topics to an organization that would have presenters capable in all the topics, that would make my life easier.”

“It would be nice to get completion reports for those that we pay for.”

“CE coordinators are looking at learning management systems.”

“I need to talk with IP to find out what kind of things they offer; we don't have a fulltime CE person but would like to offer more CE to our libraries.”

“It would be nice if I didn't have to physically register them myself.”

“We are in the process of developing a curriculum specific to our state. We don't provide a lot of really in-depth training for specialized library roles, so that would be great.”

SYSTEMS

“Offering training on data privacy, patron privacy, changes in laws.”

“Help our libraries stay ahead of technology trends so that we can assist rather than catch up

"A question I keep hearing over and over again is about ADA rules/emotional pets. Mary Minow did a session a few years ago and about once every 3-4 months i refer someone to that archived webinar."

INPUT: WHAT'S ONE THING INFOPEOPLE SHOULD DO DIFFERENTLY?

Gerding and Hough asked focus group attendees, "What's one thing Infopeople should do differently?" Responses are highlighted here.

BOARD

All liked: *"Find a way to be really quick and responsive to current issues. e.g. Today's federal budget has generated a huge need for immediate advocacy. It would be great if Infopeople could promote archived advocacy webinars or courses, or very quickly put together a focused webinar on how to lobby your federal elected officials."*

"Make the online course materials available for separate purchase after the online course - someone just wants the materials, not needing the teacher's time."

"More detailed and regular analysis and reporting to the Board Maybe quarterly? or a couple of times a year?"

"The podcast from George and Joan was awesome, and I know a lot of work for them, but having something like that with regular comments from those we may only see at professional conferences is great."

STATE CE COORDINATORS

"We need help with competency-based needs assessments; and analysis for individual librarians."

"More advanced notice of training opps would really help us."

"More rigorous learner assessments - how do we know that learners have achieved a change in behavior or status?"

"I learned a lot today about the different options Infopeople provides - had no idea deposit accounts were possible, and the different types of training offered."

SYSTEM

"That is an interesting idea to promote the archived things. lots is still relevant."

"The things that help define grey areas or legal are helpful."

"The idea which was brought up earlier about using people who are not librarians to do some of the training."

"What about any pre-conferences at CLA and charge for them?"

CONCLUSION

These needs assessment activities were conducted to ensure the ongoing relevance of Infopeople's training by assessing library training needs, identifying the priority training topics to meet those needs, and recommending areas for change and improvement in Infopeople's training program. Conducting this needs analysis connects Infopeople's planning to the knowledge, skills, and abilities that library staff need to serve their communities. Infopeople can use the findings of this assessment to direct resources to areas of greatest demand. Research conducted this year also explored ways in which Infopeople may diversify services beyond webinars and courses to provide other needed services related to library professional development. The needs assessment also helped inform some participants of Infopeople's work. This was mentioned in the survey and focus groups, for example, one CE Coordinator remarked, "I learned a lot today about the different options Infopeople provides - I had no idea deposit accounts were possible, and the different types of training offered."



**95% of survey respondents
would recommend
Infopeople to others.**

The results of the research indicate that participants have a very positive impression of the training provided by Infopeople. Of the 317 respondents to the General Training Needs Survey, **95% responded that they would recommend Infopeople to others.**

Focus group participants also expressed positive perceptions of Infopeople's current training and trainers. The focus groups were very engaged and provided enthusiastic support for Infopeople's training program. There were also many comments expressing appreciation for the opportunity to give input: "Thank you for asking for our opinions," "Thanks for asking and listening!," "Thanks for inviting us to participate!"

"I consider myself fortunate to have taken so many excellent classes through Infopeople!!"

"You provide an extremely valuable service."

"I really appreciate Infopeople's training and use it frequently!"

"Any courses I have taken, or webinars I have attended have been excellent and useful in my job. They have encouraged me to pursue a learning culture in my library branches."

The findings revealed priority training topics and areas for improvement that are discussed in more depth in the preceding recommendations sections. The priority training topics most commonly identified by all stakeholder groups are summarized in the following table and the broad recommendations are included below.

PRIORITY TRAINING TOPICS	
Advocacy	Technology (Trends, Public Training, Keeping Up)
Community Engagement/Outreach	Funding and Grant Writing
Real Data	Project Management
Needs Assessments	Evaluation
Customer Service	Leadership and Supervisory Skills
Communication Skills	Innovation
Partnerships	Programming
Dealing with difficult situations & conflicts	Services to Immigrants/New Citizens
Reconfiguring Spaces/ Space Planning	Time Management
Keeping the Library Safe and Sane	Rethinking Reference

Recommendations

Suggestions for improving Infopeople's training program include the following process recommendations in five areas.

Webinars

- Provide Customized Webinars
- Provide Webinar Series
- Consider Charging for Some Webinars

Training Formats and Methods

- Provide Bite-sized Training
- Provide Customized Courses

Deposit accounts

- Promote Deposit Accounts
- Customize Deposit Account Reporting and Tracking

Communication

- Promote the Planned Training Calendar
- Provide Regular Communications with Stakeholders
- Explore Adding Content to Training Announcements

Potential New Infopeople Service and Product Offerings

- Offer Customized Assessments
- Offer Customized Preconferences
- Explore Providing Certifications

APPENDIX

A. INFOPEOPLE COURSE EVALUATION INPUT

Infopeople course participants complete evaluation forms, which not only ask for feedback about the course they are taking, but also ask for suggestions for future training. Training suggestions made in evaluation forms from January – December 2017 were analyzed (38 courses) for this needs assessment. Top Topics requested in the course evaluations were:

- Collection Management
- Communication
- Data – Collecting, Analyzing, Using
- Grant Writing and Fundraising
- Management and Supervision
- Marketing and Publicity
- Programming
- Time and Project Management
- Youth Services

B. FOCUS GROUP INPUT

Formats

BOARD MEMBERS

All board members agreed, “We need bite-sized, modular training that people can fit into busy and ever-changing schedules, e.g. webinars, independent self-paced learning.”

“I think all of the formats are of value, I think sometimes it varies by which topic and which learner”

“I refer staff to the webinars all the time for an introduction or update on a topic, those are great.”

“I think the longer courses are great for very layered or detailed topics”

STATE CE COORDINATORS

Most preferred Instructor-led courses and webinars.

“Hard to get people to complete the courses. Webinars are really good for keeping up with trends. We struggle to get people to show up for more than an hour to anything, which is why I vote webinars first.”

“I think they're more inclined to complete if it's not self-paced.”

"I much prefer f2f training. But... the 4 week instructor led courses offer more depth."
"Self-paced over courses, because they can do them at any time. But I would like to see better content than what WebJunction offers... they are pretty shallow"
"Depends on staff size / budget at library. e.g. self-paced or free hour for smaller, longer courses for larger libraries."
"FREE webinars; until the federal budget settles down and we know how IMLS will fare, it's not possible to commit to online courses for a fee. I do like the idea of independent online learning".
"It's hard to complete something without a deadline."

SYSTEMS

Overall, they preferred the webinars and self-paced online learning. They were interested in custom training.

"The webinars are fantastic as 'hit it and quit it' - I can get info really fast as an overview. Love that."
"Custom online courses sound interesting."
"I have done a 4-week course and thought it was really good - I could get a sense of what other people were doing."
"Independent Onling Learning. I have audited MOOC courses and found them helpful so i think this model would work."
"Webinars work well for trainings applicable across classifications w/in the team that don't require much interaction. Instructor led is preferred for those trainings that are on more in depth topics, like those suggested for upper management."

Cost of Webinars

BOARD

All board members wanted a group rate to be offered as well as seat packages for volume discounts. Pricing suggestions ranged from \$25-\$50.

"\$25 for the live webinar, where you can chat and ask questions, much less, maybe \$5 for the archive?"
"Other organizations (ALA, PLA) charge a substantial amount for webinars that are not as good as Infopeople's."
"I don't use the ALA ones if Infopeople has come close to the same topic, and I would pay for the Infopeople ones if it was easy, convenient"
"I think perhaps you could bundle the webinar with a course, so if you attend a webinar on a topic, they could apply some of that charge to a course that goes deeper into that topic."

"I think easy is key, such as allowing a single login attached to a deposit account that then I could authorize multiple people to use without needing a separate charge; would help systems spend training money wisely

STATE CE COORDINATORS

Most preferred a library or statewide subscription for webinars. A sliding scale based on pop served or budget was appealing. Many agreed with the statement, *"The iTunes model of a smallish fee is probably sustainable. I think ALA's webinars, by contrast, are too expensive."*

"Staff might value them more if they knew we were paying a small fee for them to attend."

"We pay for all/most profdev for library staff statewide - would be willing to pay a reasonable amount for the IP webinars - they're good value."

"It might be nice to have 1 free webinar per quarter? Some libraries will never be able to pay to attend training."

"Consider them good marketing for the courses. I don't pay for people to take webinars."

"We like your webinars, and you can develop more current topics faster than us....so that might be a good benefit to the state. I would hate to see you go away. I do worry about individual libraries spending to attend, as we have a lot of organizations in our state already doing that."

"If we had input on the topics and speakers, then we would be more willing to support the cost of a webinar."

"I like that approach (one hour free, 2-4 week course pay-for)."

"We have a statewide library consortium, so maybe pricing based on that sort of thing."

"I don't consider webinars true training; make no mistake. I encourage people to take webinars, but just don't consider that they offer much more than being informational."

"All of my presenters do it for free, and I coach as needed. I use experts in my state. I may not know enough about how/if libraries in my state are paying for courses...Also for me to attend any training that costs \$, I have to know about it far in advance so I can get it through our purchasing dept."

"It is interesting...a perceived value for webinars...we need about 3 months notice due to our situation."

"probably 2 months notice of webinars."

"Most of our libraries don't have training budgets so we'd have to fund it at the state level which is problematic with IMLS in limbo. I would hope the cost would be low \$25-\$50 at most for an individual webinar. I wonder what will happen to the archives? I use a lot of the those in my online certification program."

"I have found IP to be flexible in terms of POs and that sort of thing - they make an effort to make it work - that is appreciated."

"Yes, a "minimal" fee."

"I also think that ALA webinars are too expensive."

"Need to consider the recordings - a cost to attend those too? Maybe a lesser cost - so those who could not attend live, could wait and get information at a discount..."

"Would be too high for most of my libraries, esp small rural. Maybe 5- 10\$..I know that is hard."

"And ALA webinars don't give us enough advanced notice."

"We wouldn't pay for individual staff to attend individual webinars here. If you wanted to capture our state, you would have to either offer the course/training specific to our state, or you would have to offer something like a 1 year pass, and we would purchase so many of those to distribute to library staff throughout the state."

"Our large libraries wo have training plans, also have staff that help create training. The small, rural libraries have neither the budget nor the staff to do their own."

"I could see us paying for access to archived webinars!"

"Would like an annual sub."

"Maybe we could do some hybrid of a state subscription with the libraries paying a minimal fee to keep all our costs down.."

"We purchase seats for the ecourses and buy more when we run out."

"A fee to access the archive would be a reasonable statewide model."

"At the state level, our state's entire training budget for purchase/hire for the year is \$3000

SYSTEMS

"Do they all need to be priced the same? Maybe you could have a few tiers based on content, experience of the presenter, etc.?"

"IFP already has great credibility. I am ok with charging, but should be low. Would also be good if an institution could purchase a bulk, like \$1000 and then let staff just charge against that so don't need to pay each time."

"I think it really depends on the content. I'd pay more for something I can't readily get somewhere else."

"I'm less likely to pay for training I can partner with a few directors in my area to do for less or for free."

"Need to think too about how right now the slides are available. would you get access to slides for free, but pay for webinar? that might not be a good model."

"Find out whatever library juice is charging and charge \$5 less. Haha"

"And is that per computer, per log in, per library, can my staff crowd around one computer?"

"Yes, need to consider that about shared listening"

Communication--Emails

BOARD

"I like the upcoming courses emails with just three or four."
"Anything that puts fewer emails in my inbox is a plus"
"Make sure your are communicating with special libraries also, not just public."
"weekly newsletters would be great."
"Yes to weekly newsletters"
"CALIX is so cluttered that I think things get lost. Maybe we need an Infopeople listserv that people can opt in to."
"There is the training list, but mostly I get that then forward the emails to supervisors or individuals."
"I agree that people don't know about the separate infopeople mailing list"
"I think the listserv needs promotion."
"Could that list include other training topics, or a way to ask questions? Training topics, best book on this topic, best way to train on that topic, etc., Brand Infopeople as the go to source for training as a whole, not just their own."
"Like the idea of having it be a more robust training listserv - but would need wide promotion which might be hard."

STATE CE COORDINATORS

They find out about Infopeople training through emails from Gini Ambrosino, the national CE list of free webinars from Wyoming, Webjunction listings, Learning RT email list, and the Infopeople website.

Potential New Offerings

BOARD

Most said all new offering suggestions would be welcome.

"Pre-conferences are a good way for me to leverage conference attendance."
"Custom webinars and courses could be an opportunity for the CSLA systems, state libraries, library associations etc. to develop and offer training under their brand - kind of like private labelling in supermarkets."

STATE CE COORDINATORS

All wanted the custom webinars. Four were very excited for the needs assessment offering, "some larger systems might be interested in their own training needs assessment." Two said they we would be interested in a statewide competencies self-assessment tool. "I would be interested in a SKILLS assessment tool for library staff and could possibly pay for that." Four were interested in ½ day preconferences. There was also Interest in the certification program, "CONTEd Forum group looking at recognizing each other's certification programs."

SYSTEMS

Custom webinars were a popular option. There was excitement about the Needs Assessment offering, "I think that could be huge!"

Preconferences were wanted, "Almost every library has staff development days and would really be interested I think in having this type of training."

Two loved the idea of developing a new Credential System and courses.

Two said, "just to throw it out, but I really like what Infopeople was doing 5-6 years ago. Infopeople was the only game in town for training and it was really in-person focused on a very local level -- there was a connection there that I no longer get with infopeople." "Yes, there are no more in-person trainings, like for cataloging. That was good. Maybe you could offer that as a boutique service."

How else could Infopeople support library learning needs?

BOARD

"Provide training packages (outlines, slides, materials) that could be delivered in house. We have just had a good experience with this type of approach for "Safe Zone" training

STATE CE COORDINATORS

"I bid out 24 webinars a year. It's a pain. If there were some way to contract to bid out the 24 topics to an organization that would have presenters capable in all the topics, that would make my life easier. I put together the topics, and then they go through approvals from the SOS, and then the Secretary's council. Once everyone is happy, then I go about bidding them out."

"It would be nice to get completion reports for those that we pay for."

"CE coordinators are looking at learning management systems."

"I need to talk with IP to find out what kind of things they offer; we don't have a fulltime CE person but would like to offer more CE to our libraries."

"It would be nice if I didn't have to physically register them myself."

"We are in the process of developing a curriculum specific to our state. We don't provide a lot of really in-depth training for specialized library roles, so that would be great."

SYSTEMS

"Offering training on data privacy, patron privacy, changes in laws."

"Help our libraries stay ahead of technology trends so that we can assist rather than catch up

"A question I keep hearing over and over again is about ADA rules/emotional pets. Mary

Minow did a session a few years ago and about once every 3-4 months i refer someone to that archived webinar."

Communication--General

BOARD

Many said: *"I think regular reporting and analysis of InfoPeople offerings, satisfaction, attendance, etc for the Board is important - with recommendations, performance data."*

"Send periodic reminders of something that is already available, such as if news breaks in a certain area, a reminder that there may be a webinar on it already in the archive."

"A better way to search the webinar archive by topic, I just have to think I remember a topic, then go browse for it."

"Maybe a more consolidated communication like a newsletter periodically - that talks about upcoming training, highlights topical archived webinars, shares "best practices" about how other libraries are approaching training."

"How about a training practices area, so trainers can work with each other?"

What one thing could Infopeople do differently?

BOARD

All liked: *"Find a way to be really quick and responsive to current issues. e.g. Today's federal budget has generated a huge need for immediate advocacy. It would be great if Infopeople could promote archived advocacy webinars or courses, or very quickly put together a focused webinar on how to lobby your federal elected officials."*

"Make the online course materials available for separate purchase after the online course - someone just wants the materials, not needing the teacher's time."

"More detailed and regular analysis and reporting to the Board Maybe quarterly? or a couple of times a year?"

"The podcast from George and Joan was awesome, and I know a lot of work for them, but having something like that with regular comments from those we may only see at professional conferences is great."

STATE CE COORDINATORS

"We need help with competency-based needs assessments; and analysis for individual librarians."

"More advanced notice of training opps would really help us."

"More rigorous learner assessments - how do we know that learners have achieved a change in behavior or status?"

"I learned a lot today about the different options Infopeople provides - had no idea deposit accounts were possible, and the different types of training offered."

SYSTEM

"That is an interesting idea to promote the archived things. lots is still relevant."

"The things that help define grey areas or legal are helpful."

"The idea which was brought up earlier about using people who are not librarians to do some of the training."

"What about any pre-conferences at CLA and charge for them?"

Deposit Accounts

BOARD

"Needs vary depending on size/type of library or system. Smaller libraries can't afford custom training, but could really make use of the deposit accounts to manage budgets"

STATE CE COORDINATORS

"Reports for attendance/completion."

"I wasn't even aware of this option. great option!"

"We use the deposit accounts and are happy to be able to offer that service to our libraries."

"IP changed the way they handled it as of July 1 - the transition was a little bumpy, but the kinks have been worked out and it seems to be working well now."

"We would need something especially if we used LSTA money to buy the seats."

"I wasn't aware of this option either. can you limit the seats to specific courses, etc?"

"It is a pain, though, that I have to do the sign-up for the individuals... we don't have a large staff."

"Reporting very important...didn't know deposit accounts were available to states"

"We have staff register with us, then we register them with IP, so we have control!"

SYSTEMS

"Probably most libraries don't know about the deposit accounts. love the idea"

"Yes!"

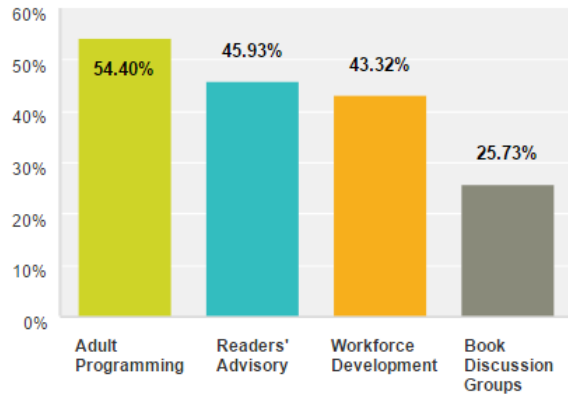
"Would use."

"Might need to think about ensuring the funds are spent during that FY for accounting reasons."

C. GENERAL TRAINING NEEDS SURVEY TOPIC CHARTS

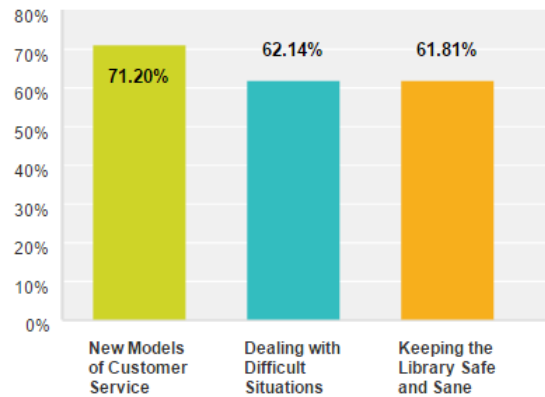
Adult Services

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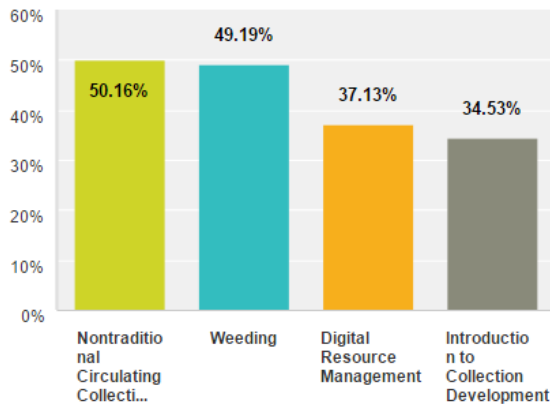
Customer Service

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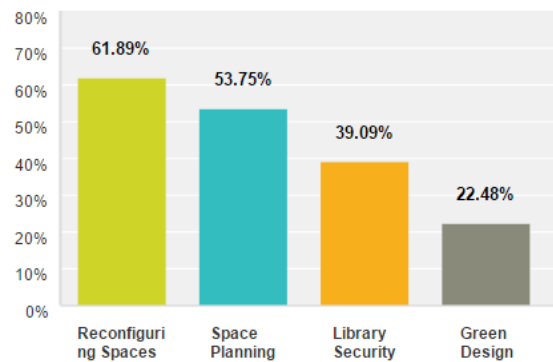
Collection Development

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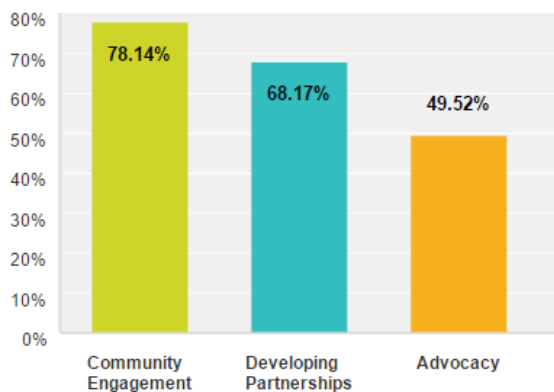
Facilities Management

Answered: 307 Skipped: 10



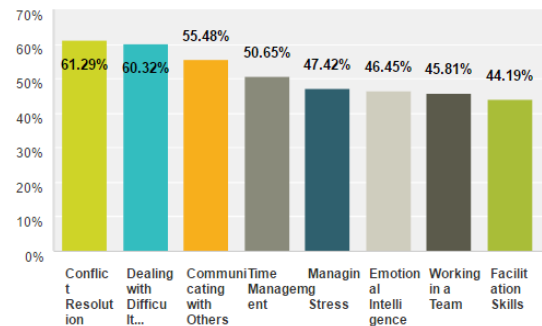
Community Outreach

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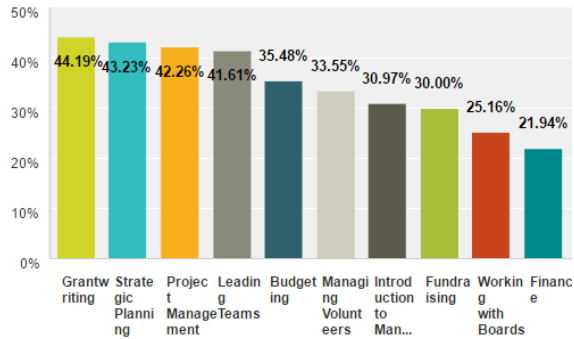
Interpersonal Skills

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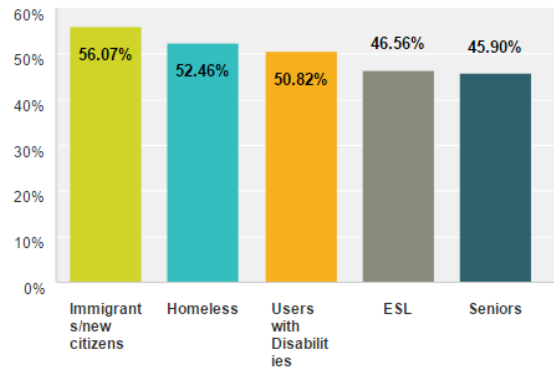
Library Administration, Management & Supervision

Answered: 310 Skipped: 7



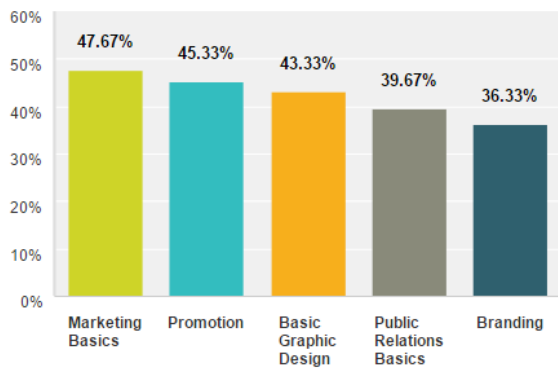
Special Populations

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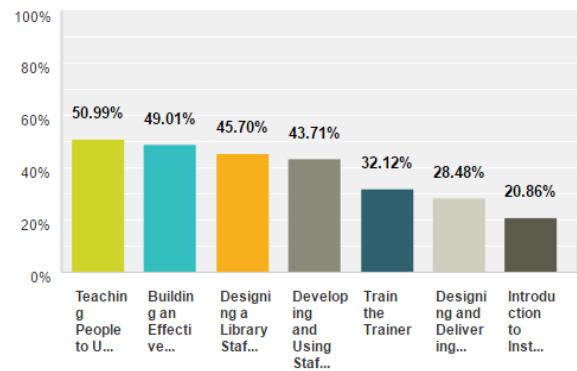
Marketing

Answered: 300 Skipped: 17



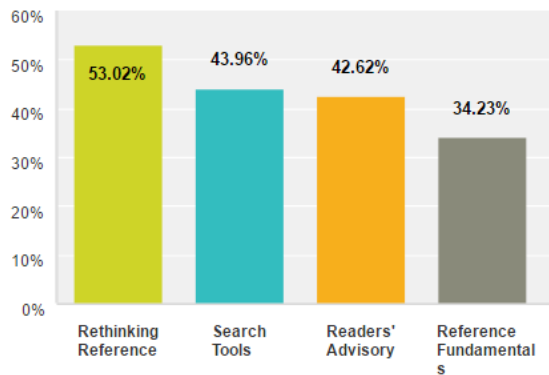
Staff & Public Training

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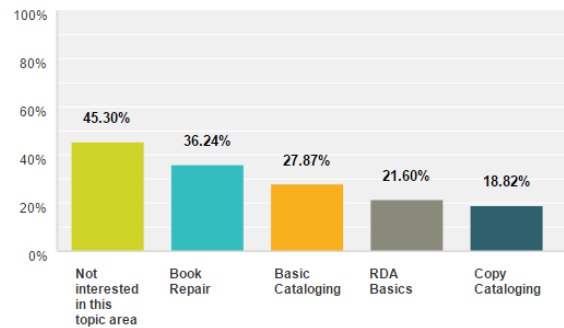
Reference & Information Services

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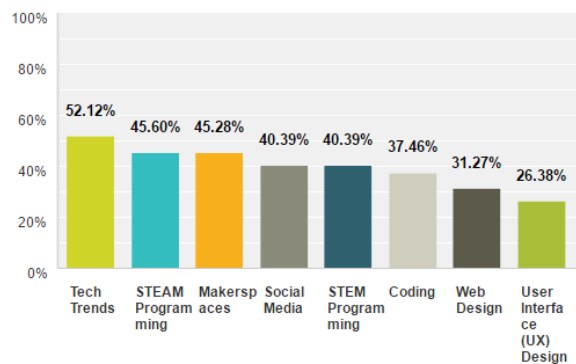
Technical Services

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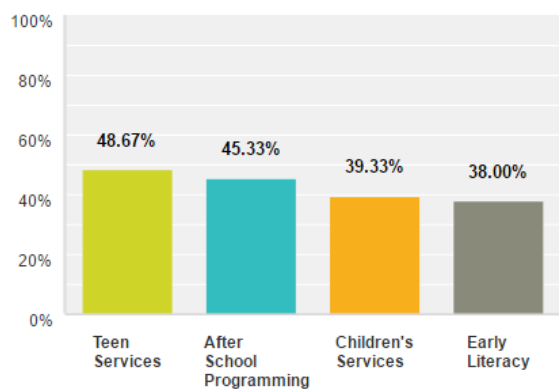
Technology

Answered: 307 Skipped: 10



Youth Services

Answered: 300 Skipped: 17



Element 7, Attachment #3: Infopeople Planned Training Calendar 2017/18

Online Courses (regular font) **Recurring Courses** (27)
Webinars (italics) **New Courses** (15)

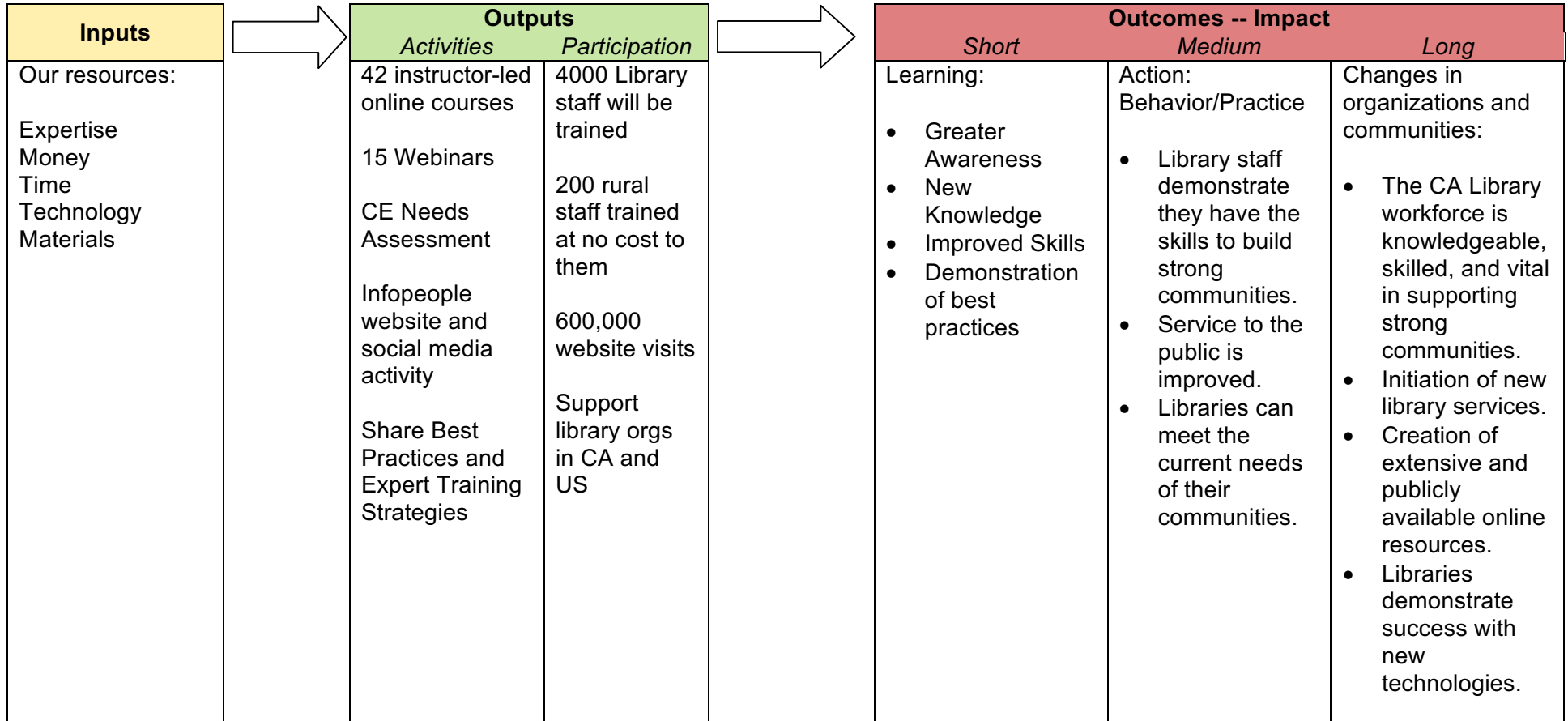
July – 2017 Effective Time Management in the Workplace Writing that Works: Written Communication for Library Staff <hr/>	August Readers Advisory: Books and Beyond (LSSC) Communication is More Than Words (LSSC) Using Social Media for Readers Advisory (SF) Using Data in Libraries <hr/> <i>Outcomes Based Programming</i>	September Children’s Services Fundamentals (LSSC) Introduction to Library Management Cultural Intelligence Program Outcomes <hr/> <i>Infopeople 101</i>
October Library Grants 101 Content Marketing (combo of 2 courses) Tabletop Games and 21st Century Skills (SF) Reconfiguring Space on a Budget <hr/> <i>New Books for Storytime</i>	November Serving People with Mental Illness Supervisory Success Parent Engagement Workshops (SF) Adult Learning Styles <hr/> <i>Storytelling for Community Relationships</i> <i>Privacy Online (Patrons and staff)</i>	December Sensory Storytimes Weeding for Your Library’s Health <hr/> <i>Passport and other Revenue Streams for Libraries</i>
January 2018 Core Reference Fundamentals (LSSC) Basic Cataloging and Classification (LSSC) Developmentally Appropriate Programming for Youth Conducting Assessments and Surveys <hr/> ***** <i>Data Analysis to inform Collection Development</i>	February Teen Services Fundamentals (LSSC) Project Management Fundamentals for Library Staff Adult Programming for Emerging Adults Training Patrons on Technology (Digital Literacy) <hr/> <i>What’s New in Children’s Literature</i>	March Library Services for Patrons Experiencing Homelessness Emotional Intelligence Experiential Learning Labs New Models of Customer Service <hr/> <i>Roving Reference</i> <i>Handling Negative Feedback and Comments online</i>
April Reader’s Advisory for Teens Using Technology for Community Engagement STEAM in the Library Conflict Resolution in the Workplace <hr/> ***** <i>Reaching out to Non-Users</i> <i>Community Led Programming</i>	May All Work is Team Work Customer Service Challenges User Experience Library Marketing Toolkit <hr/> ***** <i>What’s New in Young Adult Literature</i> <i>Emerging Tech Trends</i>	June Staying on Top of Technology Career Planning – Renew Yourself <hr/> <i>Creating Space for Learning at Work</i>

**Element 7, Attachment 4:
Infopeople 2017-2018 Logic Models & Outcomes**

Infopeople's Purpose: To provide the California library community with the skills, tools, and resources needed to deliver high-quality service in a rapidly changing world.

Infopeople's Mission statement: To improve the quality of life of the people of California by upgrading the performance and effectiveness of California libraries.

How well do Infopeople's training activities contribute to our purpose and mission? This logic model links outcomes with our activities.



When staff are well-trained and competent, they can provide services that make a difference in the lives of their library patrons.

Element 7, Attachment 4:
Infopeople 2017-2018 Logic Models & Outcomes

Outcome 1: The CA Library workforce is knowledgeable, skilled, and vital in supporting strong communities. Participants in Infopeople learning opportunities increase their knowledge and skills in library services and technologies.

Outcome 2: CA libraries demonstrate success in application of new technologies and creation of publicly available online resources used by community members.

Activity: Webinars

Evaluations will be collected via a survey immediately after the webinar.

- **Greater awareness:** Over 85% of the respondents will report greater awareness regarding the topic after a webinar.
- **Increased knowledge:** When surveyed, 90% of participants will report they increased their knowledge and skills.
- **Improved skills:** Additionally, over 90% will be able to apply what they learned in their work.

Activity: Online Courses

Course topics support the priority training needs identified in the *2018 Infopeople Training Needs Assessment*. Outcomes-based surveys will be completed immediately after finishing a course. Follow-up surveys will also be sent via email to learners in selected courses three months after a course has ended, to measure changed behaviors and practice.

- **Increased knowledge:** When asked to report the increase in their knowledge of a topic, learners will report on average an increase in knowledge of the topic of 50%.
- **Improved skills:** Over 85% of learners will find the course materials, assignments and instructors' knowledge of value and will apply what they learned in their work.
- **Change in behavior, practice:** Follow-up evaluations sent via email three months after a course ends will measure whether the things learned in the course were put into practice at the library or in the community (for example, conducted a program, developed a partnership, offered a new service, etc.).

Activity: Infopeople Shares Library Best Practices and Expert Training Strategies

- Library best practices and expert training strategies will be shared through the Infopeople website, Twitter account, and Facebook page.
- Infopeople will share best practices and training models with library support organizations such as CLA, WebJunction, State Libraries, and library consortiums.

**Element 7, Attachment 5:
Infopeople Instructor/Presenter Fees & Course Fee Changes for 2017/18**

Course Development Costs

No changes are planned for 2017/2018. Compensation for online course instructors and webinar presenters will remain at 2016/2017 rates as listed below:

Online Courses (new)

- Development fee: \$2000
- Delivery fee: 2,000

Total Fee: \$4,000

Online Courses (recurring)

- No development fee
- Delivery fee: \$2,200 (with the possible option of updates at \$75/hr)

Online Courses (short format)

- Development fee: \$1,500
- Delivery fee: \$1,000

Total Fee: \$2,500

Online Courses (short format, recurring)

- No development fee
- Delivery fee: \$1,200 (with option of updates at \$75/hr)

Webinars

- Delivery fee: \$750

Infopeople Course Fee Changes for 2017/18

As grant funding levels are reduced, Infopeople recognizes the need to raise the subsidized fees charged to learners in and out of California. Fees per course were increased in 2016/2017, and the following increases are planned for 2017/2018.

Online Courses

Current: 4-week course = \$125 in state, \$200 out of state
2017/2018 cost = \$150 in state, \$200 out of state

Current: 2-week course = \$75 in state, \$150 out of state
2017/2018 cost = \$100 in state, \$175 out of state

Webinars

Current: free
2017/2018 cost = may be a small fee charged for attending/registering

Element 7, Attachment 6: Infopeople Contract Consultants, 2017/2018

Webinar Presenters & Online Course Instructors:

Infopeople trainers are independent contractors. Once Infopeople determines training topics for the grant year, the Instructional Coordinator identifies experts in those areas and contacts them in about training for Infopeople. The Instructional Design team then works with each trainer through all initial stages of training development. While some instructors teach more than one course for Infopeople, most instructors, as subject experts, teach only one course or a series of related courses on a single topic. Biographies of Infopeople trainers for 2017/2018 are included with the grant application as Element 7, Attachment #7. The work plan for 2017/2018 calls for 15 webinars (@ \$750/webinar = \$11,250), 15 new online courses (13 new 4-week courses @ \$4,000 = \$52,000, 2 new 2-week courses @ \$2,500 = \$5,000), and 27 recurring courses (27 @ 2,350 = \$63,450).

Instructional Design Consultants:

The Instructional Design team is comprised of the Training Coordinator, two instructional designers and one online technical support person. They are compensated through a combination of LSTA grant funds and revenue (cash contribution).

Training Coordinator

1200 hours @ \$85 = \$102,000

Duties: Works closely with the Califa Interim Director to conduct training needs assessments and determine training priorities. Acts as primary recruiter for Infopeople trainers and presenters. Working with instructional designers, guides trainers through initial steps of curriculum development including creation of outlines and announcements. Develops training schedule. Directly supervises the other instructional designers. Provides instructional design for many courses, especially those dealing with technology. 2017/2018 focuses:

- Explore new partnership opportunities for Infopeople.
- Provide the lead in Infopeople marketing efforts.
- Participate in various national conferences and meetings to raise awareness of the Infopeople brand and its course offerings.
- Oversee new projects and initiatives.

Requirements: MLS degree and at least five years of professional library experience, including experience in continuing education/staff development. Needs excellent oral and written communication skills, strong organizational skills; ability to work with many different types of people; good judgment and ability to make decisions. Knowledge of California and national library landscape essential.

Instructional Designers

1600 hours @ \$75 = \$120,000

Duties: Work with Infopeople employees as a team to ensure the effective design and delivery of online courses. As assigned by the Instructional Coordinator, provide instructional design services for Infopeople online courses, giving constructive feedback to instructors in all areas of course content and activities. Proofread and edit own work and work of others to improve

**Element 7, Attachment 6:
Infopeople Contract Consultants, 2017/2018**

quality, readability, consistency, and effectiveness of courses. Review and recommend instructional improvements in all aspects of online courses, including the writing of learning objectives and course outlines, learner activities, pre- and post-assessments of learning, and course evaluations. Participate in regular Infopeople team communications and meetings. Stay current in online learning trends and technology to better evaluate and recommend improvements to the Infopeople LMS, and synchronous and asynchronous tools for online course delivery.

Requirements: MLS degree preferred. Graduate degree or coursework in online instructional design highly desirable. Excellent computer skills, including Windows, Microsoft Office, email, and web searching; excellent oral and written communication skills; strong people skills; efficient and organized; good judgment and ability to make decisions.

Online Technical Support

1370 hours @ \$65 = \$89,050

Duties: Under direction of the instructional designers, responsible for providing comprehensive support to the trainers and students in online courses, including putting trainers' materials into the Moodle courseware, providing quality control for Moodle course content, assisting with technical issues related to Moodle, and analyzing course evaluations and providing reports. Develop new course elements and provide analysis of new Learning Management Systems.

Requirements: At least two years of website management experience; strong computer/technical skills; good judgment and decision-making abilities; excellent copywriting skills.

Project Consultants:

The following two Infopeople project consultants are compensated through a combination of LSTA grant funds and revenue (cash contribution).

Project Assistant

600 hours @ \$50 = \$30,000

Duties: Responsible for the organization and operation of the basic support functions for Infopeople. 2017/2018 focuses:

- Serve as the main public contact for Infopeople via telephone and email.
- Handle learner registration in Infopeople's Learning Management System (LMS).
- Compile reports on learner evaluations.
- Handle contracting of instructors.
- Promote Infopeople events.
- Provide support as needed for other training-related activities.

Requirements: Excellent computer skills, including Windows, Microsoft Office, email, and Internet; excellent oral and written communication skills; strong people skills; organizational ability; strong general office skills; good judgment and ability to make decisions. Library background highly desirable.

Interim Director/Consultant

600 hours @ \$85 = \$51,000

Element 7, Attachment 6:
Infopeople Contract Consultants, 2017/2018

Duties: Provides transitional support for management and reporting of the Infopeople grant. Maintains Infopeople website & registration system and provides support as needed for webinar production. In conjunction with the Califa Group, monitors the Infopeople grant budget. 2017/2018 focuses:

- Maintenance of Infopeople website & registration system.
- Oversee development of 2018/2019 grant.
- Transition overall management of Infopeople grant to the Califa Group.

Requirements: MLS degree and at least five years of professional library experience, including supervision and management. Must have experience in project management and grant preparation. Needs excellent oral and written communication skills and ability to work with large numbers of people. Must have solid knowledge of California libraries and library politics and history. Needs good organizational skills and sensitivity to organizational and professional politics. Good budget skills are essential. Demonstrated ability to be innovative is highly desirable. Knowledge of computer applications in libraries is essential.

During the 2017/2018 grant year, all Infopeople management activities will be transitioned to the Califa Group. This is planned as an in-kind contribution of \$83,096 that includes:

- Paula Mackinnon, Califa Interim Director, will allocate 25% of her time in an increasingly hands-on role managing the program and conducting business development for Infopeople in partnership with Infopeople Training Coordinator Lisa Barnhart.
- Amy Jordan, Califa Member Services & Outreach Manager, will provide additional marketing and business development support (estimated 25% of her time).
- Califa Operations Manager Wayne Walker, will allocate approximately 10% of his time to Infopeople technology management.

Activities that will be assumed by Califa include:

- Management of the Infopeople website
- Management of Infopeople technology needs
- Overall management & reporting of the Infopeople grant
- Marketing and expansion into new markets of Infopeople training

This in-kind contribution allows for a reduction in Infopeople staffing as follows:

- Elimination of web manager position (phased out by June 30, 2017)
- Elimination of webinar support position (phased out by June 30, 2017)
- Elimination of Interim Director position (phased out by June 30, 2018)

**Element 7, Attachment 5:
Infopeople Instructor/Presenter Fees & Course Fee Changes for 2017/18**

Course Development Costs

No changes are planned for 2017/2018. Compensation for online course instructors and webinar presenters will remain at 2016/2017 rates as listed below:

Online Courses (new)

- Development fee: \$2000
- Delivery fee: 2,000

Total Fee: \$4,000

Online Courses (recurring)

- No development fee
- Delivery fee: \$2,200 (with the possible option of updates at \$75/hr)

Online Courses (short format)

- Development fee: \$1,500
- Delivery fee: \$1,000

Total Fee: \$2,500

Online Courses (short format, recurring)

- No development fee
- Delivery fee: \$1,200 (with option of updates at \$75/hr)

Webinars

- Delivery fee: \$750

Infopeople Course Fee Changes for 2017/18

As grant funding levels are reduced, Infopeople recognizes the need to raise the subsidized fees charged to learners in and out of California. Fees per course were increased in 2016/2017, and the following increases are planned for 2017/2018.

Online Courses

Current: 4-week course = \$125 in state, \$200 out of state
2017/2018 cost = \$150 in state, \$200 out of state

Current: 2-week course = \$75 in state, \$150 out of state
2017/2018 cost = \$100 in state, \$175 out of state

Webinars

Current: free
2017/2018 cost = may be a small fee charged for attending/registering

**Element 7, Attachment 7:
Infopeople Instructors and Presenters Bios, 2017/2018**

Barbara Alvarez – Barbara Alvarez has been training, speaking, and educating learners of various skill-levels and professional backgrounds for nearly five years. Currently she is Head of Adult Services where she works with a department and management team to increase community engagement opportunities. Previously, Barbara was a Business Liaison Librarian where she designed and delivered continuing educational tools to job seekers, professionals, and business owners.

Laura Baldassari-Hackstaff – Laura Baldassari-Hackstaff is a youth librarian at Douglas County Libraries in Colorado where she has worked for 14 years. She developed and presents an 8-week early literacy class for children 24- to 36-months-old and their parents, as well as storytimes for babies and toddlers. Laura is also a member of the Colorado Libraries for Early Literacy (CLEL) steering committee. She received her MLIS from the University of Denver in 2011.

Audrey Barbakoff - Adult Services Manager at Kitsap Regional Library and the author of *Adults Just Wanna Have Fun: Programs for Emerging Adults* (ALA Editions, 2016). For her innovative adult programs, she was named a 2013 Library Journal Mover and Shaker and one of Flavorwire's "10 of the coolest librarians alive."

Josh Berk - Executive Director of the Bethlehem Area Public Library (Bethlehem, PA) and certified in Mental Health First Aid.

Anne Cain – Anne Cain spent 40 years working in public libraries and retired in 2010 as Director of the Contra Costa County Library. Since then, she served as the Interim Director of the San Jose Public Library for fifteen months. Prior to coming to Contra Costa County, Anne worked at the Pasadena (CA) Public Library and the Newton (MA) Free Library. Under Anne's leadership, the Contra Costa County Library became a highly successful, award-winning library known for its innovative use of technology, service programs tailored to the specific needs of 26 communities and new library facilities in Antioch, Brentwood, Clayton, Danville, Dougherty Station, Hercules, Lafayette, Oakley, Orinda, San Pablo, San Ramon and Walnut Creek.

Michael Cart - Michael Cart is a nationally known expert in the field of young adult literature and of adult books for young adults. Currently a columnist and reviewer for ALA's "Booklist" magazine, he is also the author and/or editor of twenty books including such anthologies as "Love and Sex: Ten Stories of Truth" and "How Beautiful the Ordinary: Twelve Stories of Identity," and "From Romance to Realism." He is also co-author with Christine Jenkins of "The Heart Has Its Reasons," a history of gay, lesbian, bisexual, and transgender literature for young adults.

Emily Clasper - As the System Training and Operations Manager for Suffolk Cooperative Library System since 2005, Emily leads a team managing and providing support for an ILS shared by 50 of the member libraries from across the county. A certified Project Manager, Emily often coordinates large cooperative projects for the libraries in her consortium, and is actively involved in providing continuing education for the library professionals in her area.

Suzanne Flint – Suzanne Flint is a Library Programs Consultant for the California State Library. She is a program developer, nonprofit administrator and health educator with over 20 years of clinical and administrative experience developing and delivering services to help individuals and families manage a full array of health, education and lifestyle issues.

**Element 7, Attachment 7:
Infopeople Instructors and Presenters Bios, 2017/2018**

Sarah Flowers - Sarah Flowers has worked in California public libraries since 1992, as a young adult librarian, supervisor of adult and teen services, community librarian, and, until she retired in 2009, as Deputy County Librarian for the Santa Clara County library.

Stephanie Gerding - Stephanie Gerding is an independent library consultant and MaintainIT Project contributor and focuses her writing and training on technology, train-the-trainer, and grants topics. She is the author of *The Accidental Technology Trainer: A Guide for Libraries* (<http://www.infotoday.com/books/books/TheAccidentalTechnologyTrainer.shtml>.)

Francisca Goldsmith - Francisca Goldsmith has worked as an Infopeople instructor since 2000. She served as Branch Services Director of Halifax Public Libraries (Nova Scotia) and Library Services Manager at Berkeley Public Library (CA). She has managed branch services for a regional library system with urban, suburban and rural areas, served as the collection management librarian and head of teen services, and provided reference services in both academic and public libraries. Working with school and public library staff, she has provided training to support up-to-date reference assistance and to design local weeding projects.

Amanda Goodman - Amanda L. Goodman is the user experience (UX) librarian at Darien Library, a public library in Connecticut. At work, she has taught twenty classes ranging from online safety to editing photos to military genealogy. As an online instructor, she has taught hundreds of librarians how to build library websites using WordPress.

Cheryl Gould - Cheryl has been a training consultant for Infopeople since 1996. She has delivered workshops on a wide range of topics including: Increasing computer competency, search skills, Training the Trainer, Word, Powerpoint, Libris Design, Mastering Tough Public Service Situations and Cutting Edge Customer Service Techniques. Recent additions to her toolbox include helping organize library staff days and acting as MC and playground director throughout the day to facilitate people getting to know each other, have a bit of fun and stay energized.

Catherine Hakala-Ausperk – Catherine Hakala-Ausperk is currently the Executive Director of the Northeast Ohio Regional Library System (NEO-RLS) and owner of Libraries Thrive Consulting. A consultant and frequent speaker at national and state conferences, staff days and workshops, she has a passion for supporting, coaching and developing successful libraries, staff members and leaders. Hakala-Ausperk is a 30-year public library veteran and an adjunct faculty member of Kent State University's School of Library and Information Science, where she teaches Management.

Kelli Ham - Kelli Ham is the Consumer Health Coordinator for the National Libraries of Medicine, Pacific Southwest Region (NN/LM PSR). Kelli helps libraries and community organizations provide quality health information services to the public. Kelli develops presentations and training materials with a focus on health literacy, new technologies for delivery of health information, and services to special populations. Kelli created the Health e-Shows series of webinars in 2008 for Infopeople, covering a variety of consumer health topics for public librarians.

Lauren Hays – Assistant Professor and Instructional and Research Librarian, Co-Director for Center of Games and Learning, MidAmerica Nazarene University.

**Element 7, Attachment 7:
Infopeople Instructors and Presenters Bios, 2017/2018**

Linda Hofschire - Director of the Colorado State Library's Library Research Service. She has more than 15 years of experience working in social science research and evaluation.

Amy Holcomb - Experiential Learning Coordinator at Skokie Public Library, currently a featured speaker and facilitator for a Library Journal online workshop.

Brenda Hough - Brenda Hough is a library consultant and educator. She currently coordinates continuing education for the Northeast Kansas Library System. She has previously held positions with TechSoup for Libraries, The Bill and Melinda Gates Foundation, and the Lake Agassiz Regional Library System (Minnesota). She has delivered webinars and taught courses for the Public Library Association (PLA), WebJunction, Emporia State University (Kansas), and the University of Illinois - Urbana Champaign's Certified Public Administrator Program.

David Lee King - David Lee King is the Digital Services Director at Topeka and Shawnee County Public Library, where he plans, implements, and experiments with emerging technology trends. He speaks internationally about emerging trends, website management, digital experience, and social media, and has been published in many library-related journals. David was named a Library Journal Mover and Shaker for 2008.

Amy Koester – Amy Koester, MLS, is the Youth & Family Program Coordinator at the Skokie Public Library. She has been developing STEAM programs and services for youth for more than two years, and she blogs regularly about these and other library activities as the Show Me Librarian. Amy has also shared monthly STEAM program plans and ideas on the ALSC Blog and for The Library as Incubator Project. She has written articles on STEAM programs and services for School Library Journal and Children and Libraries.

Xiaoli Li - Having worked in both public and academic libraries, Xiaoli Li has a wide range of experience with cataloging. She is an active advocate for continuing education and a trainer for "Cataloging for the 21st Century," a Library of Congress initiative. She has made numerous presentations and authored several journal articles on serials control. She chaired OCLC Post Pinyin Conversion Cleanup Project and planned several major projects for the libraries where she has worked, including Yale University Libraries, University of Washington Libraries, and most currently UC Davis.

Catherine McHugh - Catherine McHugh, Ph.D. is the founder and president of McHugh Management Consulting, a firm specializing in leadership development, organizational effectiveness, and executive coaching.

Laura Olson – Laura Olson, a youth services librarian for Douglas County Libraries in Colorado, has over 12 years with libraries: half in public libraries and the other with national library networks. She has created yoga storytimes and classroom read-aloud programs, performed many literacy-based storytimes, received her MLS from Emporia State University in 2010, and currently sits on the steering committee for CLEL—Colorado Libraries for Early Literacy.

Penny Peck - Penny Peck has been a children's librarian for 25 years. Before that, she was Snow White and Mother Goose at Children's Fairyland in Oakland, ran a nightclub, worked as the wardrobe mistress for the Berkeley Ballet, and was an agent for a standup comedian. Her experience includes

**Element 7, Attachment 7:
Infopeople Instructors and Presenters Bios, 2017/2018**

performing thousands of children's storytimes, leading hundreds of book club discussions for students in grades 4-12, conducting hundreds of school tours and assemblies, reviewing children's books and media, and conducting the Performers' Showcase for auditioning library entertainment.

Laurie Putnam - Laurie Putnam has been managing writers, editors, publications, and publishing departments for two decades. Since 2004, she has been teaching professional writing and publishing to future librarians in San Jose State University's School of Library and Information Science. Laurie also runs a communications business based in Monterey, California, where she leads the development of publications and communications programs for libraries, nonprofit organizations, and high-tech companies. Prior to forming her own business, Laurie was director of branding and marketing communications at Aspect Telecommunications in San Jose.

Matt Reidsma - Matthew Reidsma is the Web Services Librarian at Grand Valley State University in Allendale, Michigan. He is the co-founder and editor-in-chief of Weave: Journal of Library User Experience, a peer-reviewed, open access journal for Library User Experience professionals.

Mary Ross - Mary Ross has over 25 years of experience working in public libraries and managed the staff training and development program at the Seattle Public Library for eight years. In addition to an MLIS, she has certificates in online learning design and in online classroom facilitation. Under contract to the Washington State Library, she designed "Anytime, Anywhere Answers" and "The Virtual Reference Adventure," online training programs for virtual reference providers. She has also designed courses for WebJunction and LibraryU.

Jane Salisbury - Jane Salisbury supervises Library Outreach Services at Multnomah County (OR) Library, providing service to all kinds of non-traditional library patrons, including home-bound people, immigrants, older adults, inmates, and shelter residents.

Crystal Schimpf - Crystal Schimpf is a librarian and a trainer, with a passion for digital literacy and technology issues. She provides collaborative, transformative training for libraries and nonprofits. She has provided training on projects for the Urban Libraries Council's Edge Initiative, the Public Library Association, TechSoup, the Colorado State Library, Community Technology Network, and the R-Squared Conference. One of her areas of expertise is training for rural populations.

Aaron Schmidt – Aaron Schmidt is a principal at Influx Library User Experience Consulting and maintains a library and website usability weblog, walkingpaper.org. He has presented on the topic of library technology and usability throughout the United States, and in Canada, the UK, the Netherlands and Spain. In 2005, Schmidt was named a Library Journal "Mover & Shaker."

Lisa Shaia – Lisa M. Shaia is a children's librarian. She has been working in the field with children of all ages, from babies to teenagers, since 2005. She developed and taught classes for ALA's Association for Library Service to Children's division. Storytime Tools focused on ways to spice up your storytime, and Series Programming for the Elementary School Age instructed you on using series books for successful after school programs.

Laura Solomon - Laura Solomon, MCIW, MLS, is the Library Services Manager for the Ohio Public Library Information Network and the former Web Applications Manager for the Cleveland Public

Element 7, Attachment 7:
Infopeople Instructors and Presenters Bios, 2017/2018

Library. She has been doing web development and design for over 12 years in public libraries and as an independent consultant. She specializes in developing with Drupal, as well as in web code and accessibility standards. As a former children's librarian, she enjoys bringing the "fun of technology" to audiences and in giving libraries the tools they need to better serve the virtual customer.

Kaite Stover - Kaite Mediatore Stover is the Director of Readers' Services for The Kansas City Public Library. She holds Masters degrees in Library Science and English Literature from Emporia State University. Stover is the co-editor of The Readers' Advisory Handbook (ALA Editions 2010) with Jessica E. Moyer. She has contributed chapters to Research-Based Readers' Advisory (ALA Editions 2008) and Integrated Advisory Service (Libraries Unlimited 2010). Currently, Stover writes the "He Reads, She Reads" column for Booklist with David Wright and "Under the Radar" for Public Libraries with Jessica E. Moyer.

Jennifer Weeks - Jennifer Weeks is Supervising Librarian of Children's Services for Santa Clara County Library.

Julie Winkelstein - Julie Ann Winkelstein has held a variety of positions, from jail and prison librarian to family literacy coordinator to children's, teen and adult services librarian to newspaper columnist. She returned to school in 2008 and received her PhD in Information and Communication in 2012. Her dissertation focused on homeless LGBTQ youth and public libraries and brought together her twin interests of social justice and public libraries.

Element 7, Attachment #8
Infopeople Technology Vendors, 2017-2018

Technology	annual cost
GoTo Meeting	\$1,800.00
Amazon Web Server	\$500.00
Caption Colorado (1)	\$600.00
CloudFlare (2)	\$240.00
dotList	\$600.00
Dropbox for Teams	\$760.00
iATS (Cyber Source) (3)	\$2,800.00
Giant Rabbit (4)	\$12,600.00
Rackspace (email)	\$312.00
Remote Learner	\$6,120.00
SurveyMonkey	\$300.00
Vimeo Pro	\$199.00
WordPress	\$99.00
Total	\$26,930.00

1. Caption Colorado provides closed captioning on request.
2. CloudFlare is a service that protects the server from Denial of Service (DoS) and cyber attacks
3. iATS (Cyber Source) is the vendor Infopeople uses to process all website credit card transacti
4. Giant Rabbit is the Drupal and CiviCRM hosting service used by Infopeople.

CONSULTANT FEES

CONSULTANT FEES

Consultant Name	Role	Estimated No./Hours	Hourly Rate	Estimated Cost
Lisa Barnhart	Manages instructional design team. Handles recruitment of instructors and presenters. Oversees new projects and initiatives.	1200	\$85	\$102,000
Brenda Hough	Instructional designer helps instructors in development and presentation of online courses. Provides support for grant development and assists with webinar production.	800	\$75	\$60,000
Mary Augugliaro	Instructional designer helps instructors in development and presentation of online courses. Produces Infopeople webinars and handles webinar presenters.	800	\$75	\$60,000
Nancy Nerenberg	Online technical support for online courses. Handles content going into Moodle and develops tutorials as needed.	1370	\$65	\$89,050
Gini Ambrosino	Main point of contact for Infopeople. Handles Moodle registration for learners and other support tasks as assigned.	600	\$50	\$30,000
Eileen O'Shea	Grant reporting & management. Handles Infopeople website support & maintenance.	600	\$85	\$51,000
Califa Group	Califa is providing in-kind support for Infopeople (\$83,096), taking on management of the grant and supervision of the website.			\$83,096
Marketing consultant	Support for a marketing plan to explore new markets (\$50,000 - cost to be covered by revenue, not LSTA grant funds).			50,000
Webinar Presenters	Infopeople pays subject experts \$750 to develop & present one-hour live webinars. 15 webinars are planned for 2017/2018.			11,250
Instructors	Infopeople hires subject experts to develop and deliver courses. Fees range from \$2,350 for a recurring course, to \$4,000 for a new online course. 42 courses are planned for 2017/2018.			\$120,450
Estimated Consultant Hourly Cost Total				\$656,846