National Network of Libraries of Medicine (NN/LM)

(RFP) Number: NLM RFP 05-103/VMW

Offeror: University of Utah

Region Number: Region 4/MidContinental Region

**Type of Proposal: Technical Proposal – Final Proposal
             Revisions**

Statement of Work Area: Outreach Evaluation Resource Center

NN/LM Outreach Evaluation Resource Center

NLM RFP 05-103/VMW
OMB NO. 0990-0115

University of Utah
Spencer S. Eccles Health Sciences Library
10 North 1900 East, Bldg. 589
Salt Lake City, UT 84112

Technical Proposal
Outline of Final Proposal Revisions

Revisions to the final proposal were made in the following manner:
- Eliminated text is denoted using a strikethrough. ~~Strikethrough~~
- New text is bolded. **Bold**

See sample paragraph below:

> **Electronic document delivery in the region will be coordinated by the Network Member Liaison.** To assist libraries as they migrate to electronic document delivery, the Network Member Liaison will develop promotional and instructional materials on how to use current and emerging methods of electronic delivery. ~~These materials will be available from the web and will form the basis of articles to be published in the MCR newsletter.~~ **Information on electronic document delivery will be included on the MCR web site. Articles will be written for the Plains to Peaks Post newsletter, as well as short reminders or notices will be included in the weekly RML News. Articles will also be written for state and local health science library newsletters, where possible. State liaisons will be responsible for including information on electronic document delivery in communications and visits with member librarians. They will also present information on electronic document delivery at local health science library meetings and when teaching classes to health science librarians.** The MCR will pull statistics on an annual basis to determine whether we are meeting the indicators for the number of libraries offering electronic document delivery service.

The table of contents has been updated to reflect the current document.

Table of Contents:

Technical Proposal Cost Information/Summary of Labor and Direct Costs

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Direct Labor Hours						
Professional Personnel						
OERC Director (Betsy Kelly)	1040	1040	1040	1040	1040	5200
OERC Coordinator (TBN)	2080	2080	2080	2080	2080	10400
OERC Coordinator (TBN)	1040	1040	1040	1040	1040	5200
Support Personnel						
Programmer	312	312	312	312	312	1560
Total Hours	4,472	4,472	4,472	4,472	4,472	22,360
Direct Labor Cost:	118,332	123,064	127,987	133,106	138,430	640,919
Material Cost:	2,000	0	4,000	0	0	6,000
Travel Cost:	13,849	15,469	13,604	16,167	16,555	75,643
Other: Consultant for Mapping	8,654	10,800	5,562	5,729	5,901	36,645
Other: Consultant for Handbook Revision		27,733	20,800			48,533
Other Cost: Includes Communications, Reproduction, Supplies, Professional Development	11,700	17,000	17,390	17,789	18,198	82,078
TOTAL DIRECT COST	154,535	194,066	189,342	172,791	179,084	889,819

NN/LM Outreach Resource Evaluation Center
Technical Proposal

Part 1: Mission, Goals, and Regional Service Plan

The National Library of Medicine, through the Regional Medical Library Network and now the National Network of Libraries of Medicine, has conducted outreach activities for nearly 40 years. The earliest efforts of the outreach were to build awareness of health professionals on the products and services available from the Library and to improve access to biomedical literature.

In 1987 the NLM Board of Regents Planning Subcommittee convened a Panel on Outreach to address the Senate Committee on Appropriations' request that NLM "develop an active outreach program to disperse ...information to rural and remote health care professionals..." The Panel was charged with developing "a plan that would address the need to increase the awareness of prospective users; suggest strategies for removing obstacles to access; and propose mechanisms to insure the maximum relevance of NLM's diverse array of information products and services. The August 1989 report of the Panel, *Improving Health Professionals' Access to Information: Report of the Board of Regents* (http://www.nlm.nih.gov/archive/20040721/pubs/plan/ih/contents.html) described recommendations and a series of actions to accomplish each recommendation; each series of actions included an evaluation component.

Of significance was the charge to conduct user studies to understand "the impact of MEDLINE-derived information on the professional practice of medicine." The report goes on to say "(e)valuation studies and user panels...not only point the way to the development of optimally designed products ... but they also can contribute significantly to our intellectual understanding of the scientific communications process that, ultimately, succeeds or fails in transferring the results of biomedical research from the bench to the bedside."

The panel's recommendation was to "plac(e) a high priority on research to ascertain the information requirements of U.S. health professionals, the suitability of current means for acquiring health-related information, and impediments to such acquisition. Using these data, NLM should mount a national campaign to increase awareness of its information products and services among all health professionals in all settings, and *put in place permanent feedback mechanisms to ensure their optimal utility*...(author's emphasis),"
http://www.nlm.nih.gov/pubs/plan/ih/sec_4.pdf

By the end of 1998, NLM made available MEDLINEplus, a web resource of health information for the general public with the aim that "(e)ventually ... all Americans become aware of the wealth of good health information available to them that has resulted from the nation's investment in biomedical and behavioral research." NLM has funded outreach projects through the National Network of Libraries of Medicine and in 2000 established the first center charged specifically

with training and assisting in evaluation activities centered on these outreach programs.

For a number of years funding agencies such as the United Way and the WK Kellogg Foundation have required that funded projects demonstrate how programs they support achieve the goals set out in their proposals. Since 1993 the United States government has focused on the results of activities undertaken. Under the Government Performance and Results Act federal agencies must develop multiyear strategic and performance plans and produce annual performance reports. (http://www.gao.gov/new.items/gpra/gpra.htm). The National Library of Medicine, as an agency of the federal government, needs to know whether and how the funds committed to the NN/LM Regional Medical Libraries have contributed to the goals of the NLM:

> • To develop collaborations among network members and other organizations to improve access to and sharing of biomedical information resources throughout the nation;
> • To promote awareness of, access to, and use of biomedical information resources for health professionals and the public, with a particular emphasis on contributing to the Healthy People 2010 goal of eliminating health disparities;
> • To develop, promote, and improve electronic access to health information by network members, health professionals, and organizations providing health information to the public.

Although RMLs have for many years submitted quarterly and annual reports of the activities and progress made under their funding as Regional Medical Libraries, formal evaluation of outreach efforts had not been a program element. In developing its response to the 2000 request for proposal for the National Network of Libraries of Medicine (NN/LM), the University of Utah committed its proposed Regional Medical Library to active and specific evaluation efforts. This RML believes that the NLM, the NN/LM and the Network members must share information about information access needs and understand how the activities carried out under the auspices of the RML contribute to reducing disparities in access to health information and increase awareness and use of NLM products and services. Programs that include an evaluation component from the outset enable planners and program staff to monitor the effectiveness of the planned programs and adjust activities to meet the articulated goals and outcomes.

The NN/LM MidContinental Region (NN/LM MCR) has incorporated evaluation in its program planning since the beginning of the current contract. One FTE has been devoted expressly to assessment and evaluation of the health information needs of the region's health professionals and consumers, to the needs of hospital librarians and other health information professionals and to assisting RML staff and Network members in building programs that will meet those needs. Formal planning using logic models, a web based activities tracking database and reports based on that data have ensured that the NN/LM MCR

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activities and regionally funded awards are meeting the expressed goals of the contract, that the information needs of the region's population are addressed and that specific measures can be taken to demonstrate the success of NN/LM MCR sponsored work.

The NN/LM MidContinental Region proposes to fulfill the requirements of the Statement of Work for the Outreach Evaluation Resource Center by extending its experience of the past five years to all the Regional Medical Libraries and the Network members of the National Network of Libraries of Medicine. This proposal is to house the OERC at the Becker Medical Library, Washington University in St. Louis, Missouri where the Assessment and Evaluation Liaison is located. The Liaison will become the Assistant Director, OERC and will apply her experience and expertise in evaluation to the tasks of extending outreach evaluation to all RMLs and Network members in the NN/LM. 1.5 FTE professionals and .15 FTE programmer will also become OERC staff members to work with the Assistant Director in carrying out planned activities.

Statement of Work

1.   Provide or arrange for training and continuing education opportunities for NLM, RML and Network staff with regard to planning and evaluation of outreach and basic network services

Objective:

Provide or arrange for training and continuing education opportunities for NLM, RML and Network staff

Rationale:

Librarians have traditionally collected data that is used to show the quantity of work performed. Outreach evaluation requires the collection of data, but that data and its implications are often much more complex than gate counts, items circulated or reference questions answered. Useful evaluation can inform program administrators and stakeholders about the effectiveness of the work performed. It is important to know whether the individuals going through the library's gates were successful in their quest for information, whether the questions the reference staff answered assisted the inquirer in accomplishing his or her task, whether the books purchased were relevant and useful to the intended audience. Likewise, the RMLs need to know where their activities are successful in meeting their goals, which activities are less productive and how the recipients of services benefit from RML efforts.

Librarians are rarely taught the concepts and processes of evaluation practice during their Masters course work. The discipline has its own vocabulary, standards, and methods. The OERC will work with the staff of the NLM, NN/LM and Network members to assess the level of knowledge about evaluation, and will design and make available formal, informal, and self directed training opportunities so that the efforts of all these groups can be shown to achieve the goals of the NN/LM – the improvement of access to health information for the U.S. public and health professionals

All NN/LM Regional Medical Libraries will be required to designate a staff member to be responsible for evaluation during the 2006-2011 contract. The OERC will serve as a resource, trainer and collaborator working with the evaluation consultants. At the end of the next contract the National Library of Medicine will have a clear picture of how the NN/LM programs and NLM programs and services impact access to health information in the United States.

Approach and Methodology:

Discuss evaluation training needs, determine levels of knowledge, expertise and experience and RML expectations of OERC

NLM, RML and Network staffs are likely to have varied levels of knowledge, expertise and experience with evaluation planning and programs. The responsibilities of the RML evaluation consultants will be newly defined with this contract and will undoubtedly evolve over time. It will be important for the OERC staff to meet both individually and in groups with the many staff who are charged with evaluating RML activities throughout the contract period. The OERC staff will discuss evaluation training needs of each region with the Director and Associate Director and the evaluation consultant during the first quarter of Year 1. As each RML may have different needs and interests, appropriate training opportunities will be developed during the second half of Year 1 to respond to those assessed needs. These early discussions and ongoing conversations and meetings will form the basis for developing both initial and ongoing training in evaluation practice and theory for the NN/LM Regional Medical Library programs and will ensure that training remains relevant.

Offer evaluation workshops and continuing education opportunities for NLM, RML and Network staff

We anticipate that training needs will vary with the experience of assessment staff at the RMLs. The OERC will offer onsite classes and workshops using distance technologies such as Breeze. Classes will be scheduled in several regions each year, with the choice of class dependent on the needs and interests of the Region. Each workshop will be offered as a weekly series once per year and will also be developed as a self guided tutorial for Assessment Coordinators to use or refer back to as needed throughout their tenure. OERC staff will lead discussions during Breeze sessions and will also be available to discuss the materials and assist coordinators as needed when using the tutorials. Other visitors to the OERC website will be free to use the tutorial materials.

The OERC will offer twice during the contract a one day workshop for all RML evaluation consultants on project planning and evaluation. While different RMLs may have different needs there is a benefit to all consultants coming together and participating in at least one workshop early in the contract or early in their tenure in the position to introduce, practice and discuss planning and evaluation. The OERC will offer additional training using face to face, distance education technologies and self directed modules as appropriate and effective throughout the contract period.

Workshop 1: Introduction to Outcomes Based Evaluation. (Online: June)
      OERC will evaluate whether existing online toolkits designed to teach Outcomes Based Evaluation will be appropriate and can be adapted

to meet OERC and RML needs. Some of the kits to be reviewed include, but are not limited to:

- o Management Assistant Program (MAP) for Non-Profits: http://www.managementhelp.org/evaluatn/outcomes.htm
- o Tobacco Technical Assistance Consortium: http://www.ttac.org/power-of-proof/index.html
- o USDHHA Administration for Children and Families: http://www.acf.hhs.gov/programs/opre/other_resrch/pm_guide_eval/r eports/pmguide/pmguide_toc.html
- o Outcomes Evaluation in the Human Services: http://www.the2professors.com/
- o Outcomes Toolkit v.2 http://ibec.ischool.washington.edu/ibecCat.aspx?subCat=Outcome% 20Toolkit&cat=Tools%20and%20Resources

If necessary, OERC staff will develop a new workshop that will provide a foundation for the basic terminology of OBE and how it is used and will introduce the concept of OBE for RML program planning. In six sessions, one hour each, the class will begin with a discussion of the concept of outcomes based evaluation (OBE) as a system of measuring results and the reasons will RMLs will want to incorporate OBE in their work. OBE focuses efforts on understanding how the work carried out in a program positively or negatively affects desired change in the population intended to benefit from the program. At it's simplest level, the RML programs are intended to increase access to health information for the populations of the United States and OBE is a means of measuring how well the programs carried out under the auspices of the RML accomplish that purpose.

Once the terminology has been introduced, participants will begin to develop a program plan for their RML based on these concepts. They will articulate the objectives of the program, design the activities that will be carried out to accomplish those objectives, identify the outputs - or products of the activities and enumerate the outcomes, or changes that will be realized as a result of carrying out the activities. These parts will come together to form a logic model, an outline for carrying out the program.

Once the program is designed, the participants will address the evaluation plan. Participants will learn how to develop the evaluation question (i.e., what is the purpose of our program and what do we want to know about it) How will the evaluator understand the program's contribution to meeting the articulated objectives? What data must be collected and what are the possible and most appropriate data collection methods to use? What measures will be accepted as evidence of success in achieving the desired outcomes? How will this information be reported and to whom?

By the end of the series the participants will have a basic understanding of program planning, logic model development and evaluation planning. They will be able to apply this knowledge to the work of their respective RMLs and assist regional Resource Libraries and Primary Access Libraries as well as community based organizations to review their own programs in terms of planning for desired outcomes and understanding how programs do or do not contribute to achieving their objectives.

This online class supplements planning and evaluation modules in the existing OERC class "Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs". Those who have had this introduction will be better able to concentrate on evaluation theory discussed in Making a Difference and be able to apply both the theory and the practice to completing the Making a Difference exercises.

Workshop 2: Practice Using Evaluation to Plan RML programs (Online: August)

Assessment coordinators who have taken the Introduction to OBE and those who already have a level of familiarity with OBE will have an opportunity to practice creating logic models to plan for implementing OBE principles in their RML's annual planning activities. This class will consist of 4 online sessions preceded by assignments to be completed by participants before coming together in the online environment. Targeted hands on activities and discussions will result in a basic logic model outline that can be used by each RML. Attendees will work to articulate the objectives and desired outcomes for their RML activities and indicators of success that will define having achieved the desired outcome. Coordinators will then be able to share this process with their RML colleagues.

Creating Surveys using Survey Monkey (Online: March)

This class will introduce online surveys using Survey Monkey as the tool for creating the instruments. Over four one hour sessions attendees will learn the principles of survey design including types of questions that will elicit desired data; how to construct questions and check for consistency, specificity, exclusivity, and appropriate language,; use logic in guiding the path the respondent follows,; developing the survey sample population,; testing the survey with population samples to check for question validity and response validity;, distributing the survey;, and collecting and analyzing data, and reporting the results.

In addition to training specifically designed for evaluation consultants, the OERC will offer *Measuring Your Impact: Using Evaluation to Show Value* in at least one region per year and *Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs* in at least one region per year.

In addition to training specifically designed for evaluation consultants **travel has been requested to enable the OERC to offer classes at least three times per year in different regions. By offering a class at each of two joint chapter meetings (once each year 1 and year 2) as well as in two other regions each year the OERC can have broad reach to train both RML staff and Network members. If the classes are not accepted for chapter meetings they will be offered in other locations as interested groups are identified. Year One is proposed for Seattle for the Pacific Northwest Tri Chapter meeting, the Southeast and South Central Regions and Year Two for Atlanta for the joint MidAtlantic/ Southern Chapter meeting as well as the Middle Atlantic and Greater Midwest Regions. Although we would like to offer more classes, with the OERC cannot fund additional trips with the proposed budget. However, any region or local group that would like to sponsor either class at other times will be accommodated if the requestor's time frame can be met and the sponsor can fund travel for the instructors**

To extend the reach of evaluation practice the OERC will work with Regional evaluation consultants in a train-the-trainer venue by inviting them to co-teach with an OERC instructor when a workshop is offered for Network members in their region.

Continuing education and networking opportunities are plentiful in the professional evaluation community and evaluation consultants will be encouraged to investigate attendance and continuing education opportunities at the American Evaluation Association meeting. Consultants will benefit from interactions with and exposure to professional evaluators and the practice of evaluation at this meeting.

We will propose to be included on the agenda at NN/LM new staff orientation to introduce the role of evaluation in NN/LM programs
Use Breeze to introduce the OERC, its staff and its work, to new NN/LM staff and others who may be interested.

New NN/LM personnel have an opportunity to visit the National Library of Medicine for orientation sometime during the first or second year of their employment. The agenda for these two days includes presentations by the various units of the National Library of Medicine and opportunities to meet the staff of the NNO. ~~We will propose that the OERC be included on the orientation program. A thirty minute presentation that will reach nearly every new NN/LM staff member is an ideal venue for introducing the OERC and for describing the role that evaluation has in the work of the NN/LM RMLs.~~
The OERC will use Breeze in concert with conference calls during the time that new RML staff attend orientation at the NLM and/or at other times during the year to introduce the Center, its staff and its work. If it is acceptable to NLM and the National Network Office, the presentation will also be open to any interested RML staff and/or Network members, or will

be recorded for others to view asynchronously. The intent is to have a presence on the orientation program and a distance presence will work nicely to meet this objective. The cost of travel for OERC staff will be deleted from the budget. Only staff new to NN/LM will attend as regular orientation participants.

Outcomes - OERC and RML staff will receive evaluation training appropriate to their needs

Indicators - All RML evaluation consultants report that training received was appropriate to their needs

Schedule:

Year 1:
Meet with RML Directors, Associate Directors and Evaluation Consultants during RML Directors' meeting and during break out time to discuss training needs and evaluation practices in the regions

Develop training plans based on discussions with RML staff

Year 2 and Year 4:
Offer one day class on developing program and evaluation plans for RML evaluation consultants as a pre-RML Directors meeting workshop

Years 1-5:
Offer three online workshops, once each every year:
- o **Introduction to Outcomes Based Evaluation (Online: June)**
- o **Practice Using Evaluation to Plan RML programs (Online: August)**
- o **Creating Surveys using Survey Monkey (Online: March)**

Offer *Measuring Your Impact: Using Evaluation to Show Value* in at least one region per year;
Offer *Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs* or the new class being developed and piloted in 2006, Planning and Evaluating Health Information Outreach Projects, in at least two regions per year, one being during MLA chapter meetings.

The class schedule for Measuring Your Impact as taught in 2006 is
- **8:30   Introductions and Overview of Workshop**
- **9:00   The Bottom Line - Lecture and group participation**
- **9:20   A Process for Demonstrating Your Library's Value - Lecture**
- **9:30   The Vision - Lecture, group participation**

10:00	Refresh
10:15	The Environment - Lecture, discussion and class exercise
11:00	The Blueprint - Part I: The Logic Model - Lecture and class exercise
12:00	Lunch
1:00	The Blueprint - Part II: The Evaluation Plan - Lecture, class exercise and sharing
2:00	Build It - Lecture
3:00	The Housewarming - Lecture
3:15	Resources, class questions and evaluation Adjourn

The class schedule for Making a Difference as taught in 2004 is

8:00	Class introductions and Overview of Workshop
8:15	Introduction to program evaluation in outreach
8:30	Introduction to outreach theories
9:15	Stage I: Community Assessment—what is it and how will it help?
10:00	Refresh
10:30	Stage 2: Goals and Objectives—tools for goal oriented evaluatioι
10:45	Breakout Session—Exercise #1
11:05	Review Exercise #1
11:30	Stage 3: Planning activities and strategies
Noon	Lunch
1:00	Stage 3: Planning activities and strategies, cont.
1:30	Stage 4: Basics for an evaluation plan – the evaluation objective
2:00	Stage 5: Designing the evaluation
2:40	Breakout Session –Exercise #2
3:00	Refresh
3:30	Review Exercise #2
4:00	Stage 6: Making Sense of the Data
4:30	Class questions and evaluation
5:00	Adjourn

Workshop Outline for Planning and Evaluating Health Information Outreach Projects

- What is community-based outreach and how do we evaluate it?
- Conducting a community assessment
- Developing an outcomes-based project
- Identifying evaluation questions
- Writing objectives
- Selecting evaluation methods

~~Years 1-5:~~
~~Offer *Measuring Your Impact: Using Evaluation to Show Value* in at least one region per year; offer *Making a Difference: Strategies for Improving*~~

~~and Evaluating Library Outreach Programs in at least one region per year, ideally during MLA chapter meetings~~

~~We will propose to be included on the agenda at NN/LM new staff orientation to introduce the role of evaluation in NN/LM programs~~

Year 3-5:
Invite Regional evaluation consultants to co-teach with an OERC instructor when a workshop is offered in their region

Statement of Work

2.   Promote and continue to develop a Web site for information dissemination on this topic. The OERC Web site will provide documentation of best practices, lessons learned and other evaluation findings

Objective:

Promote and continue to develop a Web site for information dissemination

Rationale:

There is a wealth of information about evaluation – best practices, theory, case studies and research – both in print and online. Because formal evaluation efforts in library work are less common than in other disciplines in the social sciences it is imperative that librarians look outside the library literature for information. The OERC web site should serve as a respected, comprehensive resource for RML staff and Network members seeking guidance on designing and carrying out program planning and evaluation. Health sciences librarians are turning to the RML to help save their libraries and to ensure access to health information for professionals and the public. It is incumbent upon the RMLs to share information about showing value – the foundation of evaluation work – to assist librarians in proving their value to their institution, especially of concern to under-funded hospital administrators.

Approach and Methodology:

Develop the OERC website as a resource for health information providers for planning and evaluating programs

The OERC Web site will serve as one avenue of communication of information about evaluation of outreach and broader RML projects. The web site will be a resource to RML staff as well as to Network and Affiliate members, community based organizations, public libraries and the public health workforce seeking

tools, theory, examples and funding opportunities for planning and evaluating programs.

During the first quarter of the contract the OERC staff will evaluate the current OERC web site and begin planning for redesign as needed. One consideration will be whether materials appropriate only to RML Assessment Coordinators and other RML staff should be posted to the NN/LM Staff Wiki as opposed to posting all materials to the public NN/LM site. All members of the OERC staff will contribute material to the OERC website and staff Wiki. Each staff member will have specific areas of responsibility for review and posting while one staff member will have primary responsibility for promoting web pages. As of January 2006 many of the pages on the current site had not been updated in more than two years. Every page on the site will be reviewed two or three times a year and updates and additions made. Date of review will be noted on each page. Postings to the Outreach_eval discussion list will be archived on the site along with any articles published in RML and MLA chapter newsletters. Materials published in open access journals will be deposited in PubMed Central

The site will include
- Literature citations
- Book lists
- Best practices examples
- Lists of free resources for use in program and evaluation planning
- Tutorials and modules for self education
- Logic model and evaluation plan templates and examples
- Survey tools and information about building, administering and analyzing surveys and survey data
- Sample evaluation reports including text, photo essays, graphs and charts and discussions about reporting concerns including audiences, purpose, dissemination choices and using reporting for marketing, budgeting and planning
- Links to the What Works Clearinghouse and its Registry of Outcome Evaluators (http://whatworks.ed.gov/technicalassistance/EvlSearch.asp). OERC will work to identify evaluators experienced in health information programs, especially those who have worked with underserved populations, community based organizations, and libraries.

Create guidelines and templates for reporting best practices, lessons learned in outreach activities, evaluation experiences and use of evaluation and outreach for advocacy

As health science librarians incorporate evaluation practice into their work examples, templates and guidelines available through the OERC will support

their efforts. Seeing applications of new concepts makes it easier to apply the concepts to individual situations. Examples and templates will be drawn from both library and community based outreach evaluation projects. Achievements and findings of projects conducted under regional subcontracts and awards will be highlighted on the OERC web site. Health science librarians throughout the country will be invited and encouraged to share their successes so others can build on their work without having to "reinvent the wheel".

Expand online communications vehicles to include an Evaluation Wiki, bulletin board and a reinvigorated Outreach_Eval discussion list

In addition the OERC will utilize the NN/LM staff Wiki, activate the nascent Outreach_Eval list serve and investigate instituting a bulletin board where individuals and groups can share information about evaluation efforts and lessons learned and where these postings can be archived.

We have had both unsuccessful and very successful experiences with discussion lists and blogs (an advanced version of a bulletin board) and attribute the successes to the timeliness and usefulness of the content that is posted. The majority of users who subscribe to discussion lists are passive users, reading the posts but not contributing. That does not, however, mean the format is not an effective means of conveying information. The Community Outreach Liaison for the MidContintental Region has been sponsoring a blog - Biomedical Health Information for Communities (BHIC) for more than a year. She has documented evidence that her posts have been shared broadly in the community outreach arena, far beyond her subscriber list. The American Evaluation Association EVAL-talk discussion list digest includes 4-8 or more postings a day on evaluation topics – conducting evaluation projects, seeking assistance from other evaluators, and discussions of theories, terminology, experiences. We believe that these formats, along with an actively updated OERC website, emails pushed broadly to health science librarians in the U.S., and articles offered for chapter and regional newsletters will be effective means of sharing information about how to do evaluation, about the benefits one can realize from having carried out evaluation programs and about the services of the OERC.

The OERC will support the costs of telephone conference calls and incoming calls for assistance from Network Members through the use of an 800 number. Barriers to using this technology will be time, interest and institutional policies. Participants will have to take some responsibility for finding time to participate while the OERC's outreach will include efforts to engage the audience in the topic. The OERC can assist by offering to talk with institutional policy makers to encourage that librarians be permitted to use free, non-invasive technologies over the web. Breeze has already been tested and found useful in the RML and it, or a similar application will likely

continue to be used. Sessions can be recorded to allow those who have neither the time nor the ability to connect live to listen and learn asynchronously.

> Outcomes - The OERC website will include information about best practices, lessons learned and other evaluation findings
>
> Indicators - Evaluation Consultants report that the OERC website is a resource for projects for their regions

Schedule:

Year 1:
Create Effective Practices page on web site, including description, links to resources, examples.

Promote effective practices websites such as Effective Practices Collection http://www.nationalserviceresources.org/epicenter/ or ARL's http://www.ala.org/ala/acrl/acrlissues/effectiveprac/effectivepractices.htm as templates for health sciences librarians to use in collecting and reporting best practices data

Post annotated links to print and online evaluation reference materials

Activate an RSS feed for the OERC web site and advertise the feed to the OERC audience

Years 2-5:
Solicit input from regional libraries about projects conducted and funded by RMLs for sharing with RML staff, Network members and others interested in outreach evaluation

Post case studies, examples of reports of projects highlighting findings, experiences

Continue to post annotated links to reference materials

Investigate the use of bulletin boards for sharing and archiving information

Continue to make an RSS feed available for the OERC web site

Year 3 and Year 5:
Solicit input from NNO and RML staff and from Network members about the usefulness of the OERC website

Statement of Work

3.   Consult with Network members on specific outreach evaluation projects

Objective:

Network members will receive consultation on outreach evaluation projects

Rationale:

As more funding agencies, including the NLM, require an evaluation component as part of proposals, Network members are turning to the RMLs to assist them in designing evaluation plans. During the current contract period the NN/LM MCR has been asked to review surveys and provide input on the evaluation plans for symposia, training products and outreach awards applications. Network members are also looking inward and asking for assistance in using evaluation to prove their value to their parent institutions.

The OERC has distributed over 3000 copies of *Measuring the Difference: Guide to Planning and Evaluating Health Information Outreach*, a manual for outreach evaluation, and has taught *Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs* numerous times. *Measuring Your Impact: Using Evaluation to Demonstrate Value* was developed in 2003 and has been taught twice, reaching more than 70 librarians in Colorado and the Northeast. The class will be offered at MLA 2006 in Phoenix and requests have been made to teach the class at the Midwest MLA chapter meeting, for the Kansas Medical Librarians, and at Midcontinental Chapter MLA in 2006 and the combined Midwest/ Midcontinental chapter meeting in Omaha in 2007.

Approach and Methodology:

Promote the availability of OERC staff and Regional evaluation consultants for consultation with Network members concerning planning and evaluating the effectiveness of outreach and other health information programs

In focus groups conducted in the NN/LM MCR Network members repeatedly expressed interest in assistance from the RML to advocate for their positions, for their libraries and for their profession. Many of the more than 70 librarians who have taken the *Measuring Your Impact* class noted on the post class evaluation that the topic is timely, difficult and important for their work. The OERC can serve as a resource for Network members in writing proposals for funding, designing programs to reach underserved populations, patient families or health professionals, or reporting on the work they do to show administrators how the presence of a professional librarian contributes to the institutional mission.

Consult with Network members preparing proposals for outreach services and encourage regional evaluation consultants to speak with funding applicants at least once during the proposal preparation process

The OERC will actively assist Network members preparing proposals for providing outreach services, developing reports of effective services to their institutions, and advocating for health information professional positions. The OERC is positioned to encourage Network members to discuss plans and problems with their Regional evaluation consultants, thus strengthening the working relationships within regions between Network members and with Regional Medical Library staff. Strong, active relationships will enhance both the profession of health science librarianship and the effectiveness of librarians to improve access to health information by their constituencies. The OERC will poll evaluation consultants semi annually to see if Network members are taking advantage of the evaluation consultants expertise.

Network members and RML staff will be encouraged to contact the OERC during initial phases of program and grant proposal development. Staff will provide review and input by email and/or conference calls to assist in refining program and evaluation plans. OERC will develop a template for the online workshops that constituents can use to help articulate their plans. The home page of the OERC website will guide users to the template and describe how they can initiate contacts with OERC staff. Services available from OERC will include proposal, program and evaluation plan review, questionnaire development, training opportunities and links to online resources. While the OERC can push information to Network members through newsletter articles, emails and web sites the intended audiences must take responsibility and initiative to seek OERC support and use OERC resources. Interactions will increase if the NN/LM requires or strongly encourages those submitting proposals for grants and awards to consult with the OERC during the planning process.

Offer evaluation consulting and training to network members for both outreach and advocacy

Consultation with Network members can be an effective way to both teach evaluation and encourage its application in the workplace. The OERC will be available to Network members seeking assistance and advice on applying assessment evaluation principles and practices in their work. Classes, where health science librarians come together either physically or virtually, for several hours or a day, can play an important role in extending the knowledge and skills needed to carryout evaluation programs. Frequently individual situations come to light during class discussions offering an opportunity for OERC staff to assist attendees in analyzing problems and determining ways to apply planning and

evaluation practices to their resolution. The OERC will offer the two classes already developed and taught successfully in many regions. *Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs* specifically addresses evaluating outreach activities and *Measuring Your Impact: Using Evaluation to Show Value* addresses both outreach and library programs, teaching how to assess communities, design logic models and evaluation plans, translate data into numbers that speak to funders, and report results in ways that convince administrators of the contribution of libraries to an organization's mission and goals.

> Outcomes - OERC works with network members from each region in understanding and designing evaluation programs

> Indicators - OERC is contacted by at least one network member from each region every year
> - Each RML evaluation consultant is contacted by at least one network member per year to discuss program planning and evaluation
> - Network members participating in classes offered by OERC report that they have implemented one or more planning/evaluation practices in their work

Schedule:

Years 1- 5:

Promote consultation services to Network members through postings to NN/LM, regional and health science library listservs, articles submitted to NN/LM RML newsletters, and postings on the OERC website. The OERC will promote both the services of the OERC staff and that of the RML evaluation consultants.

Respond to requests from Network members for assistance in developing and carrying out evaluation aspects of outreach projects.

Assist Network members in identifying RML staff in their region with evaluation expertise and facilitate establishing ongoing relationships that support and enhance evaluation activities.

Regional evaluation consultants will be encouraged to speak with funding applicants at least once during the proposal application process and to contact award recipients to discuss evaluation activities related to their active awards.

Collect and report information from Regional evaluation consultants about interactions with network members

Offer *Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs* in at least one region each year, and *Measuring Your Impact: Using Evaluation to Show Value* in at least one region each year, ideally during MLA chapter meetings to attract the widest audience

Survey course attendants six months post class to determine how evaluation concepts are being implemented in Network libraries

Poll evaluation consultants twice a year to determine level of consultation services being used by Network members

Year 2:
Investigate courses other than those already developed under OERC auspices that would be useful for health science librarians

Year 3:
Offer class identified during Year 2 in at least one region

Statement of Work

4.   Assist on a selective basis in the analysis, synthesis, and reporting of evaluation results, including those of cross-regional efforts

Objective:

Participate in evaluation planning and reporting of cross-regional efforts

Rationale:

Evaluation planning is only useful if the data that is gathered is then reviewed, analyzed and reported to the stakeholders of the project. The OERC will work with the NNO and the RMLs and will encourage the inclusion of Regional evaluation consultants to ensure that evaluation is built into regional and cross-regional efforts from inception and that the process is carried out to its useful end--the production of a report based on the data collected throughout a regional or cross-regional program or activity.

Approach and Methodology:

OERC will seek to be included from the beginning in planning of cross-regional efforts

The OERC will establish and maintain regular communications with the NNO and NN/LM Regional Medical Library offices to assist in the development and inclusion of evaluation plans during design of cross-regional efforts. By requesting to work with regions from the inception of these cross-regional projects the OERC can help to ensure that useful data gathering is built into the project from the beginning and that evaluation plans are well integrated.

The OERC will assist as requested with data analysis and reporting for cross-regional and other efforts

OERC will assist Regions with developing plans and conducting data analysis and reporting for cross regional and inter-regional efforts. Each cross-regional collaboration will serve both to ensure that evaluation becomes integral to program planning and will provide guided learning for staff unfamiliar with program planning and evaluation. The see one, do one, teach one concept of medical education can be equally applied in evaluation practice. Regional evaluation consultants and Network members will all learn and hopefully adopt evaluation practices as they work with the OERC to add evaluation to outreach efforts.

Outcomes - Regions will understand how cross-regional efforts produce
desired results

Indicators - Reports of cross regional efforts include analysis of data
collected according to programming and evaluation plans

Schedule:

Year 1:
Request Directors and Associate Directors include OERC staff in planning
for cross-regional and inter-regional activities

Years 2-5:
Reminders about OERC availability to assist in regional cross-regional
project planning and evaluation will be sent via email and mentioned
during bimonthly evaluation consultants teleconferences

Participate in planning meetings for cross-regional efforts to contribute
logic model development for projects and establishment of desired goals,
outcomes and indicators for planned work

Years 3-5:
Continue involvement in planning cross-regional and inter-regional efforts

Work with those responsible for developing questionnaires, surveys, data
collection tools for projects

Review analysis, synthesis and reporting of data and conclusions drawn
from same in assessing the effectiveness of cross-regional and inter-
regional efforts in meeting the stated goals of the projects

Statement of Work

5.   Encourage collegiality and sharing among Network members and other RML staff who have related responsibilities. OERC will facilitate communication among the RML staff identified as regional evaluation consultants. This communication will include, but not be limited to, an e-mail discussion list.

Objective:

Encourage collegiality and sharing of evaluation related information and practices among Network members, Regional evaluation consultants and other RML staff

Rationale:

The RML has established a history of collegiality among staff members. Efforts of coordinators throughout the RML during the current contract have resulted in frequent communications, sharing of information and ideas and cooperation in meeting deadlines and carrying out activities. Coordinator listservs, teleconferences and sharing at breakout sessions during the RML Directors meetings have proven valuable in establishing and maintaining a sense of community among RML staff.

Many Network members work in single person libraries, have limited budgets for travel and continuing education, and few opportunities to meet with colleagues and interact with RML staff. Advances in technology have helped to reduce the distance by enabling individuals to share via email, listservs, bulletin boards, blogs and wikis. Web enabled conferences allow participants to share both thoughts and documents. Sharing ideas, seeking corroboration and collaboration serve to reinforce librarians' commitment to and improve their ability to design programs to meet their goals. Offering opportunities for communication and building collegiality around evaluation questions will result in improved programs, increased outreach, and ultimately better access to health information.

Approach and Methodology:

Activate the Outreach_Eval list.

During focus groups conducted by the NN/LM MidContinental Region, Network members stressed the value of "pushed" information. They mentioned specifically how much they appreciate the weekly email sent to them by the RML with its tips, resources, announcements and links. They said that while they often don't have time to contribute to the listserv the frequency and depth of information provided continuing education. They expressed great interest in receiving similar information about advocacy including tools, suggestions and examples they

could use in their own libraries and institutions. The Outreach_Eval listserv, focusing on evaluation tools, discussions and information, is likely to be welcomed by both the new Regional evaluation consultants and Network members who have limited opportunities to get together with their colleagues.

All Regional evaluation consultants will be subscribed to the Outreach_Eval list and invitations to subscribe will be sent to RML staff interested in outreach evaluation.

A weekly post will be sent to all subscribers by staff of the OERC. The posts may include links to useful web based evaluation resources, books and journal articles about outreach evaluation; best practices web sites, sample evaluation questions to stimulate discussion and feedback to the list.

Establishing a bulletin board where evaluators can post questions and share experiences will be investigated.

As a complement to the Outreach_Eval list, a bulletin board can add a richer level of communication and serve as a more comprehensive archive for issues of importance in evaluation. Bulletin board technology will be explored and implemented if possible on existing NN/LM servers. Questions that appear on the listserv and generate significant discussion, and those of a complex nature will be added to the bulletin board so others who do not subscribe to the listserv can benefit from the shared discussions and information.

Post training resources to the NTCC and on the OERC website

The OERC will post all course content developed by OERC staff, current and future, on the NTCC to make it available to other trainers. Through it's various communications mechanisms OERC will encourage subscribers, attendees at classes, and readers of its web and other publications to share training resources developed locally by posting to regional websites, NTCC or by submitting materials or links be included on the OERC website.

Bimonthly teleconferences will be held with Regional evaluation consultants

The various Regional coordinators have been meeting regularly by teleconference to share information and issues about their work. The Outreach/Education, Public Health, Consumer Health and DOCLINE Coordinators find these calls useful for information transfer and staying in touch with colleagues doing similar work. The OERC will establish bimonthly calls for all Regional evaluation consultants. The agenda and responsibilities will rotate among regions, but will include at least one theoretical topic, discussion of outreach evaluation being done in each region and RML evaluation activities

and/or discussion of a current publication on evaluation related to outreach. The teleconferences will be open to all RML staff interested in evaluation.

Regional evaluation consultants and Network members interested in evaluation will be invited to meet informally at MLA chapter meetings

For many Network members MLA chapter meetings are their sole opportunity to get together with colleagues. OERC will organize informal sessions to present evaluation related topics, seek input from members and afford them time to share experiences, ask questions and learn about OERC and Regional evaluation consultation services.

OERC staff and Regional evaluation consultants will meet during breakout sessions at the RML Directors' meeting at MLA

While regular teleconferences serve to keep RML staff in touch and updated on regional work, the breakout sessions at the RML Directors' meeting provide an opportunity for colleagues to explore issues in more depth. Coordinators regularly comment on how breakout sessions reinvigorate, help them to establish priorities, and get excited all over again about their work and the RML's mission. Regional evaluation consultants will benefit from spending time together to discuss their work, set directions for the coming year, and review successes, failures and problems faced during the past year.

Meet with Regional evaluation consultants and RML staff at each RML

Bimonthly teleconferences, annual meetings at the RML Directors meeting, and informal meetings at MLA chapter meetings will afford the OERC staff an opportunity to work with the Regional evaluation consultants. In addition, the OERC will benefit from meeting with the evaluation consultants and the RML staff they support at each RML. One OERC staff member will travel to each RML in the first two years of the contract. The OERC staff will plan to meet with all RML staff to discuss their work, how they are implementing evaluation practices and if desired by the RML to provide an in-service related to evaluation theory, practice and/or implementation issues.

> Outcomes - Network members and evaluation consultants work together on developing and implementing evaluation programs

> Indicators – At least one posting per week is made by regional evaluation consultants and 2 per month by network members subscribed to the OERC Outreach_Eval listserv
> – Network members will participate in informal sessions on evaluation topics at MLA chapter meetings
> – Evaluation break out sessions are designated at RML Directors meetings

Schedule:

Year 1:

Activate the Outreach_eval list including all evaluation consultants and other NLM, NN/LM and RML staff interested in evaluation discussions

Years 1-2:

Meet with Regional evaluation consultants and RML staff at each RML, 4 in Year 1 and the other 4 in Year 2

Years 1- 5:

Hold bimonthly teleconferences with evaluation consultants

Meet with Evaluation Consultants during break out time at RML directors meeting at MLA

Post weekly messages to the Outreach_eval Discussion list to stimulate conversations about current evaluation projects in the regions

Invite evaluation consultants and network members to meet informally at 2 MLA chapter meetings per year to discuss ongoing evaluation projects, share lessons learned and gather data for best practices

Post all course content developed by OERC staff, current and future, on the NTCC and the OERC website to make it available to other trainerson the OERC website.

Statement of Work

6. Assist with implementation of concepts drawn from the handbook on outreach planning and evaluation;

Objective:

Assist with implementation of concepts drawn from the handbook on outreach planning and evaluation

Rationale:

Measuring the Difference has become the resource to use in planning and evaluating information outreach projects. As a respected text it can serve as the foundation for advancing the theory and practice of evaluation in outreach programming. Librarians must begin to apply the concepts outlined in the handbook. By carrying out community assessment, developing goals and objectives, planning activities and evaluation design, collecting, analyzing and reporting data and then applying what was learned librarians will create solid evidence of the value of their work and the effect their programs have on their constituencies. As evaluation becomes an intrinsic part of RML programs the NLM will understand how the efforts it funds contribute to meeting its mission to "advance the progress of medicine and improve the public health by providing all US health professionals with equal access to biomedical information and improving the public's access to information to enable them to make informed decisions about their health."

Approach and Methodology:

Insure that concepts in the handbook, *Measuring the Difference* are included in OERC classes, consultation and communications

The OERC will have a number of opportunities to implement the concepts outlined in Measuring the Difference. Classes, workshops, teleconferences, informal get togethers, the Outreach_Eval listserv, postings on the OERC website all offer the OERC audience access to the information. OERC will encourage all regions to require that proposals for RML funding include narrative that addresses the concepts and will assist Regional evaluation consultants when requested as they consult with funding applicants about how to apply the concepts to their proposed projects.

<u>Outcomes:</u> - Concepts drawn from the handbook, *Measuring the Difference*, are applied to outreach and evaluation planning in all regions

<u>Indicators</u> – 75% of proposals submitted for RML funding discuss assessment of the problem to be addressed and state goals, objectives, outcomes and indicators for the proposed project

Schedule:

Year 1:
Review concepts in handbook to ensure inclusion in two classes taught under OERC auspices

Work with Regions to include a requirement that proposals submitted for RML funding include narratives that address the concepts in the handbook, including assessment, goals, outcomes and indicators

Year 2-5:
Work with evaluation consultants to review funding proposals for inclusion of handbook concepts

Use OERC communications tools to teach, discuss and demonstrate how to apply the concepts of program planning and evaluation from the handbook

Statement of Work

7.   Revise the handbook on outreach planning and evaluation to include concepts related to collaboration with community-based organizations, participatory evaluation and program logic models;

Objective:

Revise the handbook on outreach planning and evaluation to include concepts related to collaboration with community-based organizations, participatory evaluation and program logic models

Rationale:

A handbook that can serve as both a resource and a toolkit is invaluable, especially for inexperienced evaluators. The WK Kellogg Foundation freely distributes two volumes – the Logic Model Development Guide and the Evaluation Handbook. A similar product, focusing on program planning and evaluation for health information providers, should become a "must have" in the personal library of professionals conducting programs to ensure access to health information. The current handbook is a good first effort but most text books benefit from review, revision and often from expansion. *Measuring the Difference* was designed to address health information outreach projects. Over the past five years evaluation of internal projects has become equally important as hospital libraries face closure. Librarians must be able to apply evaluation concepts to their own programs if we have any hope of being able to extend library services beyond our institutions to reach the unaffiliated and under-served. Measuring the Difference can be the text the health science librarians turn to for both internal and outreach evaluation in their efforts to show the value and the impact of their work on improving universal access to health information.

Approach and Methodology:

Undertake an evaluation of the Handbook on outreach planning and evaluation.

Measuring the Difference has been distributed to over 3000 individuals or groups over the past four years. It is important, before undertaking a revision, to understand how it has been and is being used and by whom. A survey will be conducted from a sample of those who have requested the handbook over the past two years. The evaluation will seek to determine what features of the handbook are useful, what are not, and what sections need to be revised, redesigned or even eliminated and what new sections might be desired. The organization of the handbook including the layout of text, illustrations and the toolkits will be examined for effectiveness and utility.

Discuss handbook with units of NLM responsible for outreach programs

The NN/LM National Network Office, NLM Division of Specialized Information Services (SIS) and the NLM Office of Health Information Program Development will be invited to discuss the handbook and provide input on its value to them and their constituencies and ways it can be enhanced to increase its usefulness in developing evaluation plans for their programs.

Revise the handbook

Several staff of the MidContinental RML have read and used the Handbook of Outreach Planning and Evaluation. They have reported that while the content is important and the handbook is a resource, it is dense and difficult to use as a workbook. The Handbook includes theory, practice, terminology, examples, worksheets and illustrations in a two column layout that is interspersed with figures, illustrations, boxed text and examples along with worksheets and references. We intend to reorganize the content into more discrete sections, providing first an introduction to evaluation theory, then a step wise discussion that takes the reader through the planning and evaluation process. The concepts behind "small ball" evaluation will be incorporated to enable the user to develop very focused projects. The revision will update any concepts, theories and resources that have developed since the original publication.

Content will be presented using a two page layout. Text will be placed on the right hand page Illustrations and figures will be printed on the corresponding left hand pages. In order to reduce the number of pages a reader must go through for each section all references will be collected in an appendix organized by the evaluation topic they address. The many appendices of the current edition will be reviewed; those that are retained will include a page reference to the section of the handbook that discusses the activity or theory illustrated in the appendix.

The OERC will also contact a sampling of individuals who have requested copies of the handbook and ask for their input on readability, usability, value to their planning and evaluation programs and for suggestions for improvements. This feedback will be incorporated into the content and layout revisions for the second edition.

The current OERC at the University of Washington is developing a series of manuals based on the Handbook and intended to be used in concert with a new class "Planning and Evaluating Health Information Outreach Projects". These manuals will be reviewed and incorporated into OERC work or modified based on plans for the Handbook revision.

~~A consultant will be employed to draft the revision and expand content to include information about collaboration, participatory evaluation, the use of logic models for program planning and project management.~~ Information gathered and presented during the Symposium on Community Based Health Information Outreach will be incorporated. Resources such as The Power of Proof, from the Tobacco Technical Assistance Consortium (http://www.ttac.org/power-of-proof/index.html), the WK Kellogg Foundation (http://www.wkkf.org), The Institute for Museum and Library Services (http://imls.gov), A Handbook for Community Participatory Assessment: Experiences from Alameda County will be used as guides in rewriting the new edition. (http://www.acphd.org/AXBYCZ/Admin/DataReports/commhandbook_allweb.pdf) A consultant will be hired to assist with the revision.

> <u>Outcomes</u> – Measuring the Difference will be reviewed and revised

> <u>Indicators</u> – Measuring the Difference, 2d edition will be published in Year 3

Schedule:

Year 1:
Review Handbook on outreach evaluation and planning for content, organization and layout

Develop questionnaire to solicit input on value of the handbook and ways it is used and interest in additional topics

Distribute questionnaire to handbook recipients and analyze feedback

Discuss with NNO and other units of NLM (SIS and Office of Health Information Program Development) ways to make the handbook useful for their programs

Year 1-2:
Hire consultant to revise the handbook to address data collected in review process

Year 2-3:
Consultant will assist in expanding the handbook to include new information related to development of logic models, community based outreach, participatory evaluation

Year 3:
Publish and distribute the revised handbook to all evaluation consultants, network members receiving awards from RMLs

Years 3 – 5:
Distribute revised handbook

Send questionnaire (or link to online survey) to individuals who request copies of the handbook

Statement of Work

8. Assist and coordinate the evaluation-related activities of RML staff identified as regional evaluation consultants

Objective:

Assist and coordinate the evaluation-related activities of RML staff identified as regional evaluation consultants

Rationale:

Regional evaluation consultant is a position newly identified in the contract for 2006-2011. Each region is charged with identifying an individual who will be responsible for evaluation activities for that RML. It is likely that some of the consultants will be, although interested and enthusiastic, inexperienced in formal evaluation while others will have had training and experience in planning and conducting evaluation programs. This responsibility offers the OERC an opportunity to bring all Regional evaluation consultants together to form a group that can collaborate, share experience and expertise, and assist the National Network Office in formally reporting on the impact of the NN/LM Regional Medical Library program.

Approach and Methodology:

Discuss regional approach to evaluation

This contract is the first time that each NN/LM RML will have a staff member whose responsibilities specifically include evaluation. Although every region reports quarterly and annually on its activities and accomplishments, there is now an opportunity to specifically discuss each region's approach to evaluation, mechanisms the regions expect to use in developing evaluation programs and the possibility of nationwide standards that can be used to paint a broad picture of the impact of the NN/LM on access to health information.

The OERC staff will meet with RML Directors and Associate Directors and Assessment Coordinators in conjunction with the RML Directors meetings during MLA 2006 and during subsequent Directors' meetings to continue discussion of the role of evaluation in each of the RMLs, the approach the Directors are taking in implementing evaluation activities and to discover needs of the Associate Directors relative to evaluation activities. The OERC staff will follow the meetings with Directors and Associate Directors by convening the regional Assessment Coordinators in a breakout session. This time will be used to help both the OERC and the Assessment Coordinators understand how each views the scope and role of evaluation

in the RML, identify additional topics appropriate for training and support from the OERC, and discuss areas where the regional consultants are collaborating and are forming active partnerships with Network members and other RML staff. Travel planned for year one includes trips by the Assistant Director or OERC staff to visit with RML staff at PNR, SCR, NER and SEA. Travel in year two would reach RML staff at PSR, MCR, GMR and MAR.

~~The OERC staff will meet with RML Directors and Associate Directors in conjunction with the RML Directors meeting during MLA, 2007. The intent of this meeting will be to begin discussion of the role of evaluation in each of the RMLs, the approach the Directors plan to take in implementing evaluation activities and to discover needs the Associate Directors have begun to identify relative to evaluation activities. The OERC staff will follow the meeting with Associate Directors by convening the regional evaluation consultants in a breakout session. This time will be used to help both the OERC and the regional evaluation consultants understand how each views the scope and role of evaluation in the RML, identify topics appropriate for training and support from the OERC and areas where the regional consultants can collaborate and form an active partnerships with Network members and other RML staff.~~

Establish key indicators across regions

Key indicators relevant to specific cross-regional efforts and to the RML program will enable the OERC and the RMLs to gather and report data that paints a picture of the entire NN/LM program. These indicators may include, but not be limited to, measures such as the number of full and affiliate members, new members, and Loansome Doc users in each region, the number and dollar amount of subcontracts and other awards given out, partnerships established with community based groups and public libraries. The key indicators will assist Regional evaluation consultants to assess the work of their region in relation to that of the RML program as a whole.

Work with evaluation consultants as requested to establish planning and evaluation models for their regions

Evaluation consultants will be encouraged to prepare annual and contract plans for programming and evaluation in order that they can report results derived from RML activities. The OERC will offer to participate in the development of logic models or other means chosen for the planning process. The OERC will work with the evaluation consultants throughout the contract in reviewing the status of plans, data collection tools and report generation.

Offer the NN/LM MCR Activities Reporting System as a resource for other RMLs

In the NN/LM MCR logic models are the foundation for a web based system, Activity Reporting System (ARS), used by RML staff to record activities. The ARS was implemented during the 2004-2005 contract year and liaisons recorded 985 activities. NN/LM MCR is using the ARS to determine how closely RML staff activities matched plans for the year and which and what kinds of activities contributed to achieving the goals and outcomes articulated for this RML. Modifications are made to ARS to reflect lessons learned during the previous year. ARS has replaced monthly reports submitted by each liaison. The RML administration is able to create quarterly reports for the NNO by running ARS reports that describe the activities of each state and special projects liaison. Through the use of logic models and ARS the RML staff understand how their work relates to each others', what efforts are required to carry out RML activities and which activities and types of work are most effective in meeting the articulated goals of the RML.

Evaluation consultants in each region will need to design data collection systems The OERC will offer ARS as one way to gather data relating to RML work. RMLs interested in using the system will work with OERC to propose modifications that will meet their needs. OERC will work with Web-STOC and programmers to port the system to the NN/LM web server and provide a resource for data collection and reporting for all interested RMLs.

> Outcomes – All RML regions carryout evaluation as part of their program planning

> Indicators - All RML evaluation consultants use program planning and evaluation concepts to produce reports of regional

Schedule:

Years 1:
Discuss regional approach to evaluation with RML Directors and Associate Directors

Meet with evaluation consultants during breakout sessions at RML Directors' meetings

Investigate making NN/LM MCR Activities Reporting System available to all regions for recording activities and tracking progress against regional plans

Years 1-5:
Continue to meet with RML Directors and Associate Directors during MLA to discuss regional approaches to evaluation

Produce and update reports outlining a national approach to NN/LM RML evaluation based on discussions with RML Directors and Associate Directors

Speak or meet individually with each Regional evaluation consultant and with NNO staff to establish an understanding of the role the OERC staff can have in the evaluation activities of the region, cross regional efforts and the RML program

Assist in establishing and reviewing key indicators that can facilitate cross regional evaluation of activities

Work with Web-STOC to install, modify and maintain ARS system for use in other regions

Statement of Work

9.   Assist as needed with the evaluation efforts undertaken by other NN/LM centers

Objective:

Assist with evaluation efforts of NN/LM centers

Rationale:

"The NN/LM Outreach Evaluation Resource Center helps meet the outreach evaluation needs of the entire NN/LM, and in so doing works with all RMLs, various network members and other organizations as appropriate." The National Training Center and Clearinghouse and the Web Services & Technology Operations Center are resources for all RMLs and as such are charged with supporting the work of the RMLs. It is no less imperative that these two centers establish goals and outcomes and determine indicators of their success than it is for Network members to use evaluation processes to understand how their work impacts access to health information. The staff of the NN/LM Outreach Evaluation Resource Center has a responsibility to assist the NTCC and Web-STOC to demonstrate how they are effective in meeting their responsibilities to the National Network Office and the National Library of Medicine.

Approach and Methodology:

The OERC will work with the NTCC and Web-STOC to understand the evaluation related needs of the centers, provide training if necessary and to develop evaluation plans for their programs. OERC will work with the center staffs to determine what they should be evaluating, to establish the purpose of the evaluation and to select the best evaluation methodology. The Regional evaluation consultant at the RML where each Center is located will need to be involved in both RML and Center evaluation programs. As such the evaluation consultants will participate with the OERC and Center staff in developing and carrying out evaluation of the Center's work.

Assist NTCC and Web-STOC with developing objectives for each center and preparing program and evaluation plan

The OERC will work with the NTCC and Web-STOC to assist them in developing their objectives. Their responses to the Request for Proposal should form the basis of the objectives of each Center. The OERC will suggest that each Center form an evaluation subcommittee to develop evaluation plans. The OERC will offer to participate in a series of teleconferences during which a logic model and evaluation plan for each center will be developed.

Consult semi-annually with centers to support review of planned and actual activities and progress toward desired outcomes

The OERC will offer to consult semi-annually with the centers' Directors and evaluation subcommittees to review their activities as they relate to their logic models or program and evaluation plans. The centers will be encouraged to regularly review their plans to ascertain how well their work follows their expectations and how that work is achieving their desired goals and outcomes. The OERC will assist the centers if requested to modify and/or update their plans to ensure that annual and final reports of the center document that the work reflects the goals, activities, and outcomes the Centers. The OERC will offer to assist the Centers in developing responses and presentations for their site reviews.

> Outcomes – The National Training Center and Clearinghouse and the Web Services & Technology Operations Centers will each complete an evaluation of their work

> Indicators – The NTCC and the Web-STOC will have a logic model and evaluation plan in place to be used in the evaluation of their progress

Schedule:

Year 1:
Contact Assistant Directors of NTCC and Web-STOC to discuss evaluation plans, understand training needs and establish an understanding of where the OERC can contribute to the Center's evaluation efforts

Offer to work with the Centers to develop program and evaluation plans that will serve as a foundation for site review to be conducted during the contract

Participate in at least one teleconference or meeting with each center to introduce and discuss evaluation practices.

Suggest a subcommittee be formed to develop logic model and evaluation plan for Center programs

Work with the evaluation subcommittee as requested

Year 2:
Work with each Center director to develop program logic model including goals, outcomes and success indicators

Meet with Center evaluation subcommittees to develop logic model and evaluation plans for Center programs

Years 3-5:
Meet semi annually with Center directors and evaluation subcommittees to review progress in terms of logic model and proposed evaluation plans

Assist Centers as requested in preparing responses for site reviews and with other evaluation work

Statement of Work

10. Participate in a review of the center, to be conducted at least once during the contract, by selected representatives from NLM and the RMLs

Objective:

Participate in a review of the center at least once during the contract

Rationale:

Just as the OERC supports the evaluation efforts of the RMLS and Network members it will have in place an evaluation plan for its own work. Leading by example, the OERC will publish its logic model, outlining its goals, desired outcomes, and the indicators by which it will measure its success.

Approach and Methodology:

Prepare a logic model and evaluation plan that will guide the work of the OERC

The OERC will extend the work of the NN/LM MCR in planning and evaluation to provide an example to other NN/LM centers and NN/LM Regional Medical Libraries for developing logic models and evaluation plans to guide its work. The OERC will form an advisory group from among NN/LM RML and NNO staff to assist in this development by reviewing drafts of the plans, contributing to setting priorities and serving as reviewers of questionnaires, surveys, templates and other tools developed by the Center staff. During the site review process the OERC will share its logic model and evaluation plans with the selected representatives from the NLM and the RMLs whose job it will be to review the center's work and progress. All data and reports produced as part of the work of the OERC will be included in the record of the OERC and will be made available to visitors to the Center Web site and to reviewers.

Form an Advisory Group

Evaluation in libraries is a relatively new endeavor and not well understood among librarians. Advisors from the broader evaluation community and from community based organizations who have experience with evaluation, as well as librarians who have been trained in conducting evaluation projects and taught evaluation have much to offer the OERC and the RML. An advisory group will be formed to assist the OERC in formulating its plans, setting priorities and reviewing work. Members will be sought both from within the library community and from among evaluation professionals. **The thirty librarians who participated in the University of Illinois Outcomes Based Evaluation Institute, RML staff Maryanne Blake, Cathy Burroughs of the**

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PNR, and former RML staff member Beryl Glitz, who has written and taught about focus groups, will be qualified to serve as advisors to the OERC. Interaction with an advisory group will result in creative programming for the OERC and the RMLs. It will provide the OERC with a resource of experts to provide input in OERC strategy and complex/broad decisions on how best to provide evaluation support. The OERC staff will meet by teleconference twice a year with advisory group members to discuss the work of the Center and review plans for continuing appropriateness and needed modifications. It is anticipated that this group will enrich the work of the Center and will benefit the entire NN/LM by contributing its expertise to the application of evaluation methodology and practice. The OERC will bring the group together twice during the contract – in years 2 and 4 – for more in depth interactions.

While televideo, email and telephone are outstanding means of communications meeting in person twice during the contract period affords the advisory group a chance to spend extended and concentrated time discussing and assisting in the planning of OERC programming and educational efforts. The time together will be used to review the previous year's logic model, to examine how well the center has achieved the indicators and outcomes described, and to use that information to plan the next year's logic model. Experience in the MidContinental RML tells us that this is a highly interactive process that takes the better part of two days. A meeting will permit the group to fully incorporate the thoughts expressed in a plan for the following years. Since travel to St. Louis is relatively inexpensive this budget item is retained.

Participate in site review

The OERC will prepare responses to questions from the site review committee and will participate in the site review when scheduled.

> Outcomes – The OERC will receive a positive site review report

> Indicators – Logic models, evaluation plans and responses to site review committee questions will be favorably reviewed

Schedule:

Year 1:
Develop a logic model and evaluation plan for Year one and Years one through five that will guide the work of the center and act as a yardstick against which the Center's activities will be measured.

Identify individuals to server as members of an Advisory Group for the OERC and invite their participation

Meet by teleconference with the advisory group

Year 2-5:
Develop a logic model for year two and review the five year plan

Meet semi-annually **via teleconference** with the advisory group to review Center plans and activities

Years 2 and 4:
Invite the Advisory Group to St. Louis for in depth review and planning for OERC efforts

Year 3-5:
Prepare responses to questions submitted by the NLM site review committee

Participate in the site review when scheduled.

Statement of Work

11.   Obtain services for the development of presentation-quality maps of NLM's outreach projects and NN/LM's outreach activities with data retrieved from existing Web-based applications.

Objective:

Obtain services for the development of presentation-quality maps of NLM's outreach projects and NN/LM's outreach activities

Rationale:

The old adage "a picture is worth a thousand words" was never truer than when applying it to Geospatial Information Systems. GIS provides a way for the NN/LM to show the depth and breadth of its reach, the populations affected, the activities conducted. Maps quickly tell the story of the effort that the Regional Medical Libraries, their Resource Libraries and awardees expend in extending access to health information to all populations of the United States. Data collected over the past five years was used with GIS systems to produce maps that tell at least a portion of the story. The vast distances and varying population densities are easily seen on maps and help explain the challenges that RML staff face in their efforts to achieve NLM's goals.

Approach and Methodology:

Consult with NNO, RML directors, RML staff to determine whether and how current mapping programs meet the needs of the organization

Every RML was required during the 2001-2006 contract to produce maps that illustrated their work. Although staff from each RML received training in using the ARC-GIS software the complexities of the systems preclude any staff from becoming an expert without significant practice. Many staff members expressed interest in the ability to produce maps but lack the training or access to the software. The OERC will consult with the NNO and RML staff first to review their satisfaction with current mapping applications, and second to solicit their input on desired maps, interfaces for creating maps and data sets that would be useful in mapping RML activities.

Contract with Washington University Network Technology Services for development of presentation quality maps based on data housed entered into the Outreach Activities Reporting Forms; implementation of additional datasets for mapping outreach and RML activities as requested by RMLs and the NNO

The OERC will take responsibility for identifying experts who will work with the RMLs to develop high quality maps that tell the story of work of the RML. Washington University has a GIS community that utilizes mapping technologies in social, computer, engineering and earth and planetary sciences. The University's Network Technology Services has plans to hire a GIS expert during the next six months to provide consulting services in map development. The OERC will contract with NTS to obtain advice, programming and services necessary for all RMLs to produce maps based on data collected and stored in the Outreach Activity Reporting System housed on the NN/LM web servers.

Outcomes - Outreach activities conducted under NN/LM auspices are understood in the context of the US population and its geographic distribution

Indicators – Presentation quality maps are created that illustrate the depth and breadth of NNLM outreach activities in the United States

Schedule:

Year 1:
Review mapping applications transferred from NOMC to Web-STOC management

Consult with NNO, RML directors, RML staff to determine whether and how current mapping programs meet the needs of the organization

Year 2:
Begin developing reports of NNO outreach activities based on mapping applications. Reports will include discussion of outreach efforts across the United States, including services to underserved populations, American Indians, collaborations with community based organizations, public libraries and public health workforce and the work of health information providers

Years 2-5:
Contract with Washington University Network Technology Services for development of, modifications of mapping software; implementation of additional datasets for mapping outreach and RML activities including

Year 3-5:
Write, post, distribute share reports of outreach activities based on GIS mapping

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Logic Model

OBJECTIVES	ACTIVITY	SCHEDULE (year/s of contract)	OUTCOMES	INDICATOR
1. Provide or arrange for training and continuing education opportunities for NLM, RML and network staff with regard to planning and evaluation of outreach and basic network services;	Discuss evaluation training needs, deterermine levels of knowledge, expertise and experience and RML expectations of OERC Offer evaluation workshops and continuing education opportunities for NLM, RML and Network staff We will propose to be included on the agenda at NN/LM new staff orientation to introduce the role of evaluation in NN/LM programs	Year 1: Meet with RML Directors, Associate Directors and Evaluation Consultants during RML Directors' meeting and during break out time to discuss training needs and evaluation practices in the regions Develop training plans based on discussions with RML staff Year 2 and Year 4: Offer one day class on developing program and evaluation plans for RML evaluation consultants as a pre-RML Directors meeting workshop Years 1-5: Offer Measuring Your Impact: Using Evaluation to Show Value in at least one region per year; offer Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs in at least one region per year, ideally during MLA chapter meetings We will propose to be included on the agenda at NN/LM new staff orientation to introduce the role of evaluation in NN/LM programs Years 3-5: Invite Regional evaluation consultants to co-teach with an OERC instructor when a workshop is offered in their region	OERC and RML staff will receive evaluation training appropriate to their needs	All RML evaluation consultants report that training received was appropriate to their needs

| 2. Promote and continue to develop a Web site for information dissemination on this topic. The OERC Web site will provide documentation of best practices, lessons learned and other evaluation findings; | Develop the OERC website as a resource for health information providers for planning and evaluating programs

Create guidelines and templates for reporting best practices, lessons learned in outreach activities, evaluation experiences and use of evaluation and outreach for advocacy

Expand online communications vehicles to include an Evaluation Wiki, bulletin board and a reinvigorated Eval_L discussion list | Year 1:
Create Effective Practices page on web site, including description, links to resources, examples.
Promote effective practices websites such as Effective Practices Collection http://www.nationalserviceresources.org/epicenter/ or ARL's http://www.ala.org/ala/acrl/acrlissues/effectiveprac/effectivepractices.htm as templates for health sciences librarians to use in collecting and reporting best practices data
Post annotated links to print and online evaluation reference materials
Activate an RSS feed for the OERC web site and advertise the feed to the OERC audience

Years 2-5:
Solicit input from regional libraries about projects conducted and funded by RMLs for sharing with RML staff, Network members and others interested in outreach evaluation
Post case studies, examples of reports of projects highlighting findings, experiences
Continue to post annotated links to reference materials
Investigate the use of bulletin boards for sharing and archiving information
Continue to make an RSS feed available for the OERC web site

Year 3 and Year 5:
Solicit input from NNO and RML staff and from Network members about the usefulness of the OERC website | The OERC website will include information about best practices, lessons learned and other evaluation findings | Evaluation Consultants report that the OERC website is a resource for projects for their regions |

| 3. Consult with network members on specific outreach evaluation projects; | Promote the availability of OERC staff and Regional evaluation consultants for consultation with Network members concerning planning and evaluating the effectiveness outreach and other health information programs

Consult with Network members preparing proposals for outreach services and encourage regional evaluation consultants to speak with funding applicants at least once during the proposal preparation process

Offer evaluation training to network members for both outreach and advocacy | Years 1- 5:
Promote consultation services to Network members through postings to NN/LM , regional and health science library listservs, articles submitted to NN/LM RML newsletters, and postings on the OERC website. The OERC will promote both the services of the OERC staff and that of the RML evaluation consultants.
Respond to requests from Network members for assistance in developing and carrying out evaluation aspects of outreach projects.
Assist Network members in identifying RML staff in their region with evaluation expertise and facilitate establishing ongoing relationships that support and enhance evaluation activities.
Regional evaluation consultants will be encouraged to speak with funding applicants at least once during the proposal application process and to contact award recipients to discuss evaluation activities related to their active awards.
Collect and report information from Regional evaluation consultants about interactions with network members
Offer Making a Difference: Strategies for Improving and Evaluating Library Outreach Programs in at least one region each year, and Measuring Your Impact: Using Evaluation to Show Value in at least one region each year, ideally during MLA chapter meetings to attract the widest audience
Survey course attendants six months post class to determine how evaluation concepts are being implemented in Network libraries
Poll evaluation consultants twice a year to determine level of consultation services being used by Network members

Year 2:
Investigate courses other than those already developed under OERC auspices that would be useful for health science librarians

Year 3:
Offer class identified during Year 2 in at least one region | OERC works with network members from each region in designing evaluation programs | OERC is contacted by at least one network member from each region every year
Each RML evaluation consultant is contacted by at least one network member per year to discuss program planning and evaluation
Network members participating in classes offered by OERC report that they have implemented one or more planning/eval uation practices in their work |

4. Assist on a selective basis in the analysis, synthesis, and reporting of evaluation results, including those of cross-regional efforts;	OERC will seek to be included from the beginning in planning of cross-regional efforts; The OERC will assist as requested with data analysis and reporting for cross-regional and other efforts	Year 1: Request Directors and Associate Directors include OERC staff in planning for cross-regional and inter-regional activities Years 2-5: Reminders about OERC availability to assist in regional cross-regional project planning and evaluation will be sent via email and mentioned during bimonthly evaluation consultants teleconferences Participate in planning meetings for cross-regional efforts to contribute logic model development for projects and establishment of desired goals, outcomes and indicators for planned work Years 3-5: Continue involvement in planning cross-regional and inter-regional efforts Work with those responsible for developing questionnaires, surveys, data collection tools for projects Review analysis, synthesis and reporting of data and conclusions drawn from same in assessing the effectiveness of cross-regional and inter-regional efforts in meeting the stated goals of the projects	Regions will understand how Cross regional efforts produce desired results	Reports of cross regional efforts include analysis of data collected according to programming and evaluation plans
5. Encourage collegiality and sharing among network members and other RML staff who have related responsibilities. OERC will facilitate communication among the RML staff identified as regional evaluation consultants. This communication will include, but not be limited to, an e-mail discussion list;	Activate the Eval_L list Establishing a bulletin board where evaluators can post questions and share experiences will be investigated Bimonthly teleconferences will be held with Regional evaluation consultants Regional evaluation consultants and Network members interested in evaluation will be invited to meet informally at MLA chapter meetings OERC staff and	Year 1: Activate the Outreach_eval list including all evaluation consultants and other NLM, NN/LM and RML staff interested in evaluation discussions Years 1-2: Meet with Regional evaluation consultants and RML staff at each RML, 4 in Year 1 and the other 4 in Year 2 Years 1-5: Hold bimonthly teleconferences with evaluation consultants Meet with Evaluation Consultants during break out time at RML directors meeting at MLA Post weekly messages to the Outreach_eval Discussion list to stimulate conversations about current evaluation projects in the regions Invite evaluation consultants and network members to meet informally at 2 MLA chapter meetings per year to discuss ongoing evaluation projects, share lessons learned and gather data for best practices	Network members and evaluation consultants work together on developing and implementing evaluation programs	At least one posting per week is made by regional evaluation consultants and 2 per month by network members subscribed to the OERC Outreach_Eval listserv Network members will participate in informal sessions on evaluation topics at MLA chapter meetings Evaluation break out sessions are designated at RML

	Regional evaluation consultants will meet during breakout sessions at the RML Directors' meeting at MLA Meet with Regional evaluation consultants and RML staff at each RML			Directors meetings
6. Assist with implementation of concepts drawn from the handbook on outreach planning andevaluation;	Insure that concepts in the handbook, Measuring the Difference are included in OERC classes, consultation and communications	Year 1: Review concepts in handbook to ensure inclusion in two classes taught under OERC auspices Work with Regions to include a requirement that proposals submitted for RML funding include narratives that address the concepts in the handbook, including assessment, goals, outcomes and indicators Years 2-5: Work with evaluation consultants to review funding proposals for inclusion of handbook concepts Use OERC communications tools to teach, discuss and demonstrate how to apply the concepts of program planning and evaluation from the handbook	Concepts drawn from the handbook, Measuring the Difference, are applied to outreach and evaluation planning in all regions	75% of proposals submitted for RML funding discuss assessment of the problem to be addressed and state goals, objectives, outcomes and indicators for the proposed project

| 7. Revise the handbook on outreach planning and evaluation to include concepts related to collaboration with community-based organizations, participatory evaluation and program logicmodels; | Undertake an evaluation of the Handbook on outreach planning and evaluation Discuss handbook with units of NLM responsible for outreach programs Revise the handbook | Year 1: Review Handbook on outreach evaluation and planning for content, organization and layout Develop questionnaire to solicit input on value of the handbook and ways it is used and interest in additional topics Distribute questionnaire to handbook recipients Discuss with NNO and other units of NLM (SIS and Office of Health Information Program Development) ways to make the handbook useful for for their programs

Years 1-2: Revise the handbook to address data collected in review process

Years 2-3: Consultant will assist in expanding the handbook to include new information related to development of logic models, community based outreach, participatory evaluation

Year 3: Publish and distribute the revised handbook to all evaluation consultants, network members receiving awards from RMLs

Years 3 – 5: Distribute revised handbook Send questionnaire (or link to online survey) to individuals who request copies of the handbook | Measuring the Difference will be reviewed and revised | Measuring the Difference, 2d edition will be published in Year 3 |
| 8. Assist and coordinate the evaluation-related activities of RML staff identified as regional evaluation consultants | Discuss evaluation training needs for each region with the AD and evaluation consultant Establish key indicators across regions Work with evaluation consultants as requested to establish planning and evaluation models for their regions Offer the NN/LM MCR Activities Reporting System as a resource for other RMLs | Years 1: Discuss regional approach to evaluation with RML Directors and Associate Directors Meet with evaluation consultants during breakout sessions at RML Directors' meetings Investigate making NN/LM MCR Activities Reporting System available to all regions for recording activities and tracking progress against regional plans

Years 1-5: Produce and update reports outlining a national approach to NN/LM RML evaluation based on discussions with RML Directors and Associate Directors Speak or meet individually with each Regional evaluation consultant and with NNO staff to establish an understanding of the role the OERC staff can have in the evaluation activities of the region, cross regional efforts and the RML program Assist in establishing and reviewing key indicators that can facilitate cross regional evaluation of activities Work with Web-STOC to install, modify and maintain ARS system for use in other regions | All RML regions carryout evaluation as part of their program planning | All RML evaluation consultants use program planning and evaluation concepts to produce reports of regional |

| 9. Assist as needed with the evaluation efforts undertaken by other NN/LM centers; | Assist NTCC and Web-STOC with developing objectives for each center and preparing program and evaluation plan Consult semi-annually with centers to support review of planned and actual activities and progress toward desired outcomes | Year 1: Contact Assistant Directors of NTCC and Web-STOC to discuss evaluation plans, understand training needs and establish an understanding of where the OERC can contribute to the Center's evaluation efforts Offer to work with the Centers to develop program and evaluation plans that will serve as a foundation for site review to be conducted during the contract Participate in at least one teleconference or meeting with each center to introduce and discuss evaluation practices. Suggest a subcommittee be formed to develop logic model and evaluation plan for Center programs Work with the evaluation subcommittee as requested

 Year 2: Work with each Center director to develop program logic model including goals, outcomes and success indicators Meet with Center evaluation subcommittees to develop logic model and evaluation plans for Center programs

 Years 3-5: Meet semi annually with Center directors and evaluation subcommittees to review progress in terms of logic model and proposed evaluation plans Assist Centers as requested in preparing responses for site reviews and with other evaluation work | The National Training Center and Clearinghouse and the Web Services & Technology Operations Centers will each complete an evaluation of their work | The NTCC and the Web-STOC will have a logic model and evaluation plan in place to be used in the evaluation of their progress |

| 10. Participate in a review of the center, to be conducted at least once during the contract, by selected | Prepare a logic model and evaluation plan that will guide the work of the OERC
Form an Advisory Group
Participate in site review | **Year 1:**
Develop a logic model and evaluation plan for Year one and Years one through five that will guide the work of the center and act as a yardstick against which the Center's activities will be measured.
Identify individuals to server as members of an Advisory Group for the OERC and invite their participation
Meet by teleconference with the advisory group

Years 2-5:
Develop a logic model for year two and review the five year plan
Meet semi-annually with the advisory group to review Center plans and activities

Years 2 and 4:
Invite the Advisory Group to St. Louis for in depth review and planning for OERC efforts

Years 3-5:
Prepare responses to questions submitted by the NLM site review committee
Participate in the site review when scheduled | The OERC will receive a positive site review report | Logic models, evaluation plans and responses to site review committee questions will be favorably reviewed |

11. Obtain services for the development of presentation-quality maps of NLM's outreach projects and NN/LM's outreach activities with data retrieved from existing Web-based applications.	Consult with NNO, RML directors, RML staff to determine whether and how current mapping programs meet the needs of the organization Contract with Washington University Network Technology Services for development of presentation quality maps based on data housed entered into the Outreach Activities Reporting Forms; implementation of additional datasets for mapping outreach and RML activities as requested by RMLs and the NNO	Year 1: Review mapping applications transferred from NOMC to Web-STOC management Consult with NNO, RML directors, RML staff to determine whether and how current mapping programs meet the needs of the organization Year 2: Begin developing reports of NNO outreach activities based on mapping applications. Reports will include discussion of outreach efforts across the United States, including services to underserved populations, American Indians, collaborations with community based organizations, public libraries and public health workforce and the work of health information providers Years 2-5: Contract with Washington University Network Technology Services for development of, modifications of mapping software; implementation of additional datasets for mapping outreach and RML activities including Years 3-5: Write, post, distribute share reports of outreach activities based on GIS mapping	Outreach activities conducted under NNO auspices are understood in the context of the US population and geographic distribution	Presentation quality maps are created that illustrate the depth and breadth of NNLM outreach activities in the United States

**NN/LM Outreach Resource Evaluation Center
Technical Proposal**

Part 2: Personnel

OERC will be staffed by two FTEs – Ms. Kelly, 50%, as OERC director and 1.5 FTEs as OERC Coordinators working under Ms.Kelly's supervision and direction. Ms. Kelly is an employee of Washington University Becker Medical Library which is a Resource Library subcontractor to the University of Utah Eccles Health Sciences Library. She is 50% FTE for Washington University and 50% FTE Assessment & Evaluation Liaison for the MidContinental RML. If the University of Utah is awarded the OERC contract, Washington University will be the subcontractor responsible for the OERC. Ms. Kelly will relinquish her 50% RML Liaison position and assume the Directorship of the OERC at 50% FTE. Becker Library will hire a new 100% FTE RML Assessment & Evaluation Liaison to replace Ms. Kelly. Washington University will also hire 1.5 FTE to serve as OERC Coordinators. The same position description will be used for both the full time and part time Coordinators. The responsibilities will be shared. Both Coordinators will have training responsibilities, will contribute content to the OERC website and will consult with RML staff and Network members. One will be specifically responsible for website updating and working with the Becker programmer to manage the activities reporting system that will be made available to all RMLs. The other will be specifically responsible for managing the revision of the Handbook. Once both positions are filled other responsibilities may be divided according to individual strengths. 15 FTE is budgeted for programming support. This reflects the Estimate of Effort stipulated in the Request for Proposal, page 44. Consultants will be hired, as necessary, for editorial assistance in revising the Handbook.

As OERC Director Ms Kelly will lead the project and evaluation planning efforts of the OERC. Coordinators will be involved at all stages in creating the plans, reporting work done, and evaluating the program. Ms Kelly served on the Public Health Outreach Task Force and and has led the evaluation program for the MidContinental Region since 2001. She, Claire Hamasu, Wayne Peay, Siobhan Champ-Blackwell and other staff of the MidContinental RML have experience with the work of Elliot Siegel, Fred Wood, the National Network Office, and several task forces established by the NLM and the NNO.

Washington University recruits internally and posts job openings through RML and chapter discussion lists, the Medical Library Association, the Chronicle for Higher Education, and local newspaper listings. It will also announce the positions on EVAL_talk, the discussion list of the American Evaluation Association.

Elizabeth A. Kelly
Assessment & Evaluation Liaison
Associate Director, Instructional Technologies & Library Systems
Bernard Becker Medical Library
Washington University School of Medicine
Campus Box 8132
660 S. Euclid Avenue
St. Louis MO 63110
Ph: 314-362-2783
Fax: 314-362-3647
Email: Betsy.Kelly@wustl.edu

Washington University School of Medicine, St. Louis, MO

Assessment & Evaluation Liaison, MidContinental Regional Medical Library (MCRML)

2001 – Present

Report to Associate Director, MCRML. Responsible for developing ongoing program of assessment and evaluation for the Region. Develop formal mechanism for evaluating regional programs, conduct review and evaluation of programs, provide regular feedback to NLM about NLM and NN/LM products and services, train RML staff and Network Members in the use of assessment and evaluation tools, ensure assessment and evaluation component in all RML programs and subcontracts

- Developed and administered questionnaire to obtain baseline data about network members in the MCRML
- Developed questions and organized focus groups to obtain network members input concerning MCRML programming and NLM products and services
- Developed online activities reporting system (ARS) to capture work of RML staff and collect data for analysis of effectiveness of RML programs in meeting stated goals
- Consulted and reviewed MCRML awards applications for inclusion of evaluation component
- Member, planning group for Tribal Connections Four Corners grant application, FEATHER for improving access to health information for health professionals and their patients in the Four Corners Region

Associate Director, Instructional Technologies and Library Systems, Bernard Becker Medical Library

1994 - Present

Report to the Associate Dean for Academic Information Management, and Director, Library and Biomedical Communications Center. Responsible for end-user computing services for all students (approximately 1300) in the School of Medicine. Responsible for selection, purchase, installation and management of computers, servers and printers, software in support of teaching, research and patient care. Member of Curriculum Technology Group (CTG), a joint effort of Library and the Office of Medical Student Education (OMSE) for planning, design and implementation of computer solutions for

curriculum management and course content delivery systems. Responsible for computer education courses for Washington University faculty and staff . Represent the library on committees developing a new learning-teaching center for the School of Medicine.

- Developed a state of the art computer service with over 200 computers and 5 servers in seven locations. Results include single site for all students for comprehensive assistance with any computer related problem. Instructional Technologies and Library Systems is the destination for 50% of all those entering the library. Computer use averages 13,000 hours per month.
- Working with various Deans, developed computerized student directory for the School of Medicine. Result is faculty and administration ability to identify students by picture, name, advisor, society or class; provides streamlined means of communications with selected students and groups.
- With CTG, developed and implemented curriculum databases for aggregating and evaluating course materials and administering student course evaluation surveys.
- Developed a Computer and Information Technologies Education Series providing 75 or more classes per year taken by 999 University faculty and staff. Results include generation of nearly $50,000 in annual income for the library and opportunity for building computer skills for all University faculty and staff.
- Developed computerized databases for Education Series class schedules, registration process and staff assignments. Results include consistent generation of income streams from effective management of Education Series and projection services within the School of Medicine.

1979-1994
- Led software development and responsible for daily management of the Library's integrated library system, BACS. Required working knowledge of all operational areas of the library. Responsible for planning and oversight for library network installation, software development, system implementation, documentation and training.
- Responsible for development of local Medline and Current Contents computerized literature index search systems. Resulted in improved access to National Library of Medicine and Institute for Scientific Information index databases and more effective use of indexing resources by faculty, staff and students of the School of Medicine.
- Expanded the use of the BACS system to a consortium of local medical libraries. Resulted in more effective communication among libraries and generated approximately $60,000 in ongoing annual income.
- Sold the BACS, PHILSOM serials control, and BACS/Medline systems to Mercer University School of Medicine, Macon, GA; sold the BACS system to Pohang Institute of Science and Technology, Pohang, South Korea.
- Responsible for all services provided by Circulation, Photocopy and Interlibrary Loan departments.

Ohio State University College of Medicine, Columbus, OH

Extramural Coordinator; Head, Interlibrary Loan; and Reference Librarian, Health Sciences Library

1976-1979

Reported to the Head of Reference, consulted at hospital libraries in 43 counties in Ohio providing training, grant information and expert advice in the management of hospital based health science libraries. Provided reference service, online searching and administration of interlibrary loan services for the Health Sciences Library.
- Addressed state and professional organizations concerning copyright law and health sciences library services.
- University representative to the National Library of Medicine Regional Medical Library.

Independent Consultation

Developing a Diabetes Website for Medical and Pharmacy Students. ExpressScripts. 2002

Provided installation and training support and consultation to libraries purchasing the BACS integrated library system. Locations included Mercer University School of Medicine, Macon, GA, and Pohang Institute of Science and Technology, Pohang , South Korea.

Interpreted data and provided customer software installation and training to enable utilization of textbook distributor systems.

Committees

Represent libraries to various University, regional, state and national groups working on web development, library automation and library services.

Member, Research Committee, Midcontinental Chapter, Medical Library Association, 2002 – present
Section Council Representative, Educational Media and Technologies Section, Medical Library Association 2005 – 2007.

EDUCATION

MBA	Washington University, 1999 Concentration in Health Services Management
MLS	Indiana University, 1976
BA	Indiana University, 1971

CONTINUING EDUCATION

Qualitative Data Analysis, Michael Quinn Patton, American Evaluation Association Meeting, November 2003

Return on Investment: Providing a Balanced Viewpoint of Program Success, Jack Phillips, American Evaluation Association Meeting, November 2003

Outcome Evaluation and Consulting Institute, University of Illinois at Urbana-Champaign, July 7 – 18, 2003. Sponsored by the Institute of Museum and Library Services and the Graduate School of Library and Information Science, UIUC

PUBLICATIONS

1. McEnery KW, Roth SM, Kelley LK, Hirsch KR, Menton DN, Kelly EA: A method for interactive medical instruction utilizing the World Wide Web. Proceedings - the Annual Symposium on Computer Applications in Medical Care. 502-7, 1995

2. Frisse ME, Kelly EA, Metcalfe ES: An Internet primer: resources and responsibilities. Academic Medicine. 69(1):20-4, 1994 Jan

3. Salisbury L, Toombs HS, Kelly EA, Crawford S: The effect of end-user searching on reference services: experience with MEDLINE and current contents [see comments]. Bulletin of the Medical Library Association. 78(2):188-91, 1990 Apr.

4. Crawford S, Halbrook B, Kelly E, Stucki L: Beyond the online catalog: developing an academic Information system In the sciences. Bull Med Libr Assoc 1987 July; 75:202-208.

5. Kelly EA: Book Review. Genaway, DC. Integrated Online Library Systems: Principles. Planning and Implementation. White Plains, NY: Knowledge Industry Publications, Inc. 1984 Bull Med Libr Assoc. 1985 July; 73:296-7.

6. Kelly EA, Halbrook B, Iglelnik S, Rueby C: BACS: evolution of an integrated library system toward information management. Bull Med Libr Assoc 1985 Jan; 73:9-14.

7. Igielnik S. Kelly E. BACS: Bibliographic Access & Control System. Mug Quarterly 1985 14:29-30.

8. Igielnik S. Kelly E. BACS: an Integrated library automation system with patron access to the CURRENT CONTENTS® and MEDLINE databases. Proceedings of the Ninth Annual Symposium on Computer Applications In Medical Care. IEEE. 1985.

9. Crawford S. Johnson MR, Kelly EA. Technology at Washington University School of Medicine Library: BACS, PHILSOM, and OCTANET. Bull Med Libr Assoc 1983 July;71:324-27.

10. Kelly EA, Fedders C. Instructional support for an online catalog. Medical Reference Services Quarterly 1983 Winter; 2:73-77.

11. Kelly EA. Yedlin DK. Crawford SY. Igielnik S. On-line integrated library system: bibliographic access and control system of Washington University School of Medicine. Bulletin of the Medical Library Association. 70(3):281-8, 1982 Jul.

12. Kelly B. Fedders C, Powderly A, Yedlin D. Bibliographic Access & Control System. Information Technology and Libraries 1982 June; 1:125-132.

13. Kelly E, Schwerzel S. Union List of Serials of the Health Sciences Libraries of Columbus and Franklin County, Ohio. Columbus. Mld-Ohio Health Sciences Libraries Association, 1979. 190p.

PRESENTATIONS:

1. Kelly, B, Engeszer, B, Whelan, A. Information Management for the Administration and Delivery Of Curriculum Content. Annual Meeting of the Medical Library Association, 2001.

2. Kelly, B, Igielnik, S, Gunn, P. Capturing electronic resource use cgi "click throughs" Annual Meeting of the Medical Library Association, 2001.

3. Kelly B, Cunnius E, Strombom N. The Study Space Project: Collaborative hypermedia in curriculum management. University of Iowa Symposium 99: Educating the University Community in a Dynamic Information Environment. November 11-12, 1999

4. Kelly B. Panel Discussion with Ward D, Allen G, Rickerson G. Using Technology to Support Education. Leaders in Information Resources Professional Development Conference. Anticipating Institutional Challenges: Building Responsive IT Organizations. American Association of Medical Colleges. September 12-14, 1998

5. Kelly B. Integrated and interactive technology in support of the medical school curriculum. Preparing Physicians to use the Digital Library: a Panel Discussion Computers in Healthcare Education Symposium "The Virtual Medical School" Thomas Jefferson University Philadelphia, Pa April 24-26, 1996

6. Stucki L, Kelly E. Integrated library system decision aids for collection development. Annual Meeting of the Medical Library Association, 1991.

7. Kelly E, Igielnik S. Application of online library system data for moving large academic library collections. Annual Meeting of the Medical Library Association, 1990.

8. Salisbury L, Toombs H, Kelly E, Crawford S. End-User searching and reference services: impact and implications. Annual Meeting of the Medical Library Association, 1989.

9. Crawford S. Kelly E, Salisbury L. Evaluating online biomedical databases for end users: BACS/Current Contents® and BACS/MEDLINE. Annual Meeting of the Medical Library Association, 1988.

10. Kelly E, Stucki L, Halbrook B, Gadzikowski C, Salisbury L. Research and Development at the Washington University School of Medicine Library. Poster. Annual Meeting of the Medical Library Association. 1986

11. Crawford S. <u>Kelly E</u>, Halbrook B. Nakeff-Plaat J. The development of a medical center-wide online current awareness service: BACS/Current Contents at Washington University. Annual Meeting of the Medical Library Association, 1986.

12. Igielnik S, <u>Kelly E</u>. BACS: An Integrated library automation system with patron access to the Current Contents and Medline Databases. Symposium on Computer Applications in Medical Care 1985

13. Crawford S, <u>Kelly EA</u>, Yedlin DK. Online Integrated library System: Bibliographic Access and Control System of Washington University School of Medicine library. Annual Meeting of the Medical Library Association 1982

CLASSES DESIGNED AND TAUGHT:

With Maryanne Blake, "Measuring Your Impact: Using Evaluation to Show Value". Taught April 2004, Denver CO, March 2005, Shrewsbury MA, Scheduled: Des Moines, IA, April 2006, Phoenix, AZ, May 2006, Seattle WA and St. Louis MO October 2006

Multiple one hour classes to participants in the Washington University Mini Medical School for more than 4 years. Student ages range from teen to 90. Course content includes online resources used by 21st century medical students, online content relevant to Mini Medical School courses, and a review of consumer health information available on the web. Responsible for course related links on Mini Medical School site: <u>http://medicine.wustl.edu/minimed/</u>

Outreach Evaluation Resource Center Director

Purpose of Position

Plan and implement the activity of the NN/LM Outreach Evaluation Resource Center, supervise OERC professional and support staff, and coordinate the activities of the Center with the other components of the national NN/LM program, to promote the benefits of outreach planning and evaluation and support outreach and program evaluation efforts of RML staff and network librarians.

General Responsibilities

Under the direction of the Associate Director:

1. Consult with RML staff and Network members on their outreach planning and evaluation needs.

2. Train RML staff and network members to integrate the use of planning and evaluation principles and techniques in order to improve the process and outcomes of outreach activities.

3. Participate as a team member in selected activities of the national and regional NN/LM program to promote improved health information access, use, and literacy.

4. Contribute to other components of the regional NN/LM program, as appropriate, to enhance the integration and overall relevance of the Outreach Evaluation Resource Center.

5. Perform other related duties as needed.

Specific Responsibilities

1. With OERC staff establish annual and contract goals, activities, outcomes and indicators for the Center and establish plans for achieving the stated goals.

2. Consult with Regional evaluation consultants concerning assessment, program and evaluation planning and implementation and establishing standards for evaluating regional programs.

3. Provide training and consultation for RML staff in areas such as identifying information needs and target populations, developing goals and

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objectives, planning strategies and related activities, and developing methods to evaluate process and impact.

4. Provide training and consultation for network members in development of program and evaluation plans, including creating logic models, establishing goals, outcomes and tools for data collection and results reporting.

5. Develop and maintain effective training materials and mechanisms to increase awareness, capabilities, and resources for evaluating outreach and RML programs .

6. Manage the NN/LM Outreach Evaluation Resource Center, in consultation with the Associate Director, regarding planning, budgeting, implementing, and reporting activities.

7. Develop and implement a reporting system based on annual planning logic model and evaluation plans to record Center activities and disseminate results.

8. Develop and maintain tools to disseminate planning and evaluation tips and techniques, to NN/LM staff and Network members.

9. Organize appropriate and effective use of evaluation results, including reports to the regional and national communities.

Qualifications Required:

MLS or equivalent. Formal training in program evaluation; 5 years experience in Health Science Libraries and three years experience planning and conducting evaluation programs.

Outreach Evaluation Resource Center Coordinator

Purpose of Position

Plan and implement the activity of the NN/LM Outreach Evaluation Resource Center, supervise OERC professional and support staff, and coordinate the activities of the Center with the other components of the national NN/LM program, to promote the benefits of outreach planning and evaluation and support outreach and program evaluation efforts of RML staff and network librarians.

General Responsibilities

Under the direction of the OERC Director:

1. Consult with RML staff and Network members on their outreach planning and evaluation needs.

2. Train RML staff and network members to integrate the use of planning and evaluation principles and techniques in order to improve the process and outcomes of outreach activities.

3. Participate as a team member in selected activities of the national and regional NN/LM program to promote improved health information access, use, and literacy.

4. Contribute to other components of the regional NN/LM program, as appropriate, to enhance the integration and overall relevance of the Outreach Evaluation Resource Center.

5. Perform other related duties as needed.

Specific Responsibilities

6. With OERC staff establish annual and contract goals, activities, outcomes and indicators for the Center and establish plans for achieving the stated goals.

7. Consult with Regional evaluation consultants concerning assessment, program and evaluation planning and implementation and establishing standards for evaluating regional programs.

8. Provide training and consultation for RML staff in areas such as identifying information needs and target populations, developing goals and

objectives, planning strategies and related activities, and developing methods to evaluate process and impact.

9. Provide training and consultation for network members in development of program and evaluation plans, including creating logic models, establishing goals, outcomes and tools for data collection and results reporting.

10. Develop and maintain effective training materials and mechanisms to increase awareness, capabilities, and resources for evaluating outreach and RML programs .

11. Develop and implement a reporting system based on annual planning logic model and evaluation plans to record Center activities and disseminate results.

12. Develop and maintain tools to disseminate planning and evaluation tips and techniques, to NN/LM staff and Network members.

10. Organize appropriate and effective use of evaluation results, including reports to the regional and national communities.

Qualifications Required:

MLS or equivalent degree; minimum of three years of experience in health sciences libraries with basic knowledge of evaluation theory and practice.

Programmer

Purpose of Position
The OERC Programmer provides development support and documentation for computer applications as directed by staff of the OERC staff for their use and that of the Regional evaluation consultants

General Responsibilities

1. Develops complex computer programs to meet the needs of the OERC
2. Writes, details and codes program instructions
3. Prepares flow charts and necessary documentation
4. Tests an debugs programs, correcting program errors by modifying instructions and sequences
5. Evaluates and resolves problems related to software used by the OERC

Specific Responsibilities

6. Supports the Activities Reporting System (ARS) developed for the NN/LM MCR and adopted by the OERC
7. Modifies the ARS as requested by OERC staff to support OERC and RML evaluation consultants' needs

Qualifications Required:

BS in computer science equivalent degree; minimum of two years experience in programming. Working knowledge of Unix, PHP and MySql.

Part 3: Facilities, Resources and Institutional Commitment

Institutional Experience and Commitment

The Bernard Becker Medical Library serves the faculty, staff and students of the Washington University School of Medicine and the Barnes Jewish Hospital Medical Center in St. Louis, Missouri. The library is one of the oldest and most comprehensive medical libraries west of the Mississippi serving as an information and technology services hub for the Medical Center and extending its services and resources to the global health science community.

Located on the Medical Campus of Washington University in St. Louis MO, the facility, completed in 1989, integrates biomedical information resources and information technology. The eight-level, 114,000-square-foot structure has a capacity for more than 300,000 volumes. The biomedical resource collection includes more than 200,000 volumes, some 2,000 audiovisual items and over 2,000 current journal subscriptions.

The staff of 103 employees includes librarians, computer programmers, network engineers and technicians, system administrators, user support technicians and library assistants. As Associate Director for Instructional Technologies and Library Systems and Assessment & Evaluation Liaison for the RML Ms Kelly has a 150 square foot office on Level 6 of the library. The programmer designated for the OERC currently works in this area as well. The OERC Coordinators will be located in cubicles of 100 square feet in this same area The cubicles will allow the Coordinators privacy and will save other staff from being disturbed by Coordinators' teleconferences.

Becker Library has the capability to offer both hands on training for computer based classes, traditional classroom style training for those that do not use computers, and distance training using Breeze, streaming video and Polycom videoconferencing (when compatible equipment is available at the receiving end).

Becker Medical Library OERC   Director's office (150 sq ft)
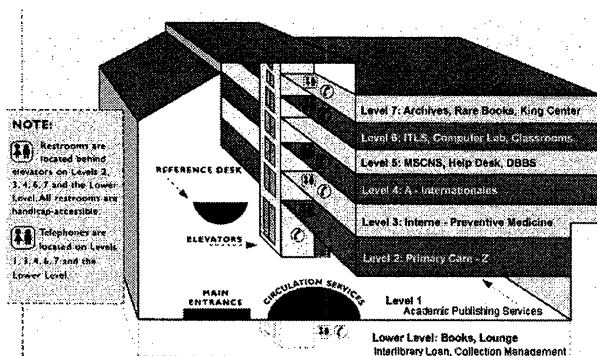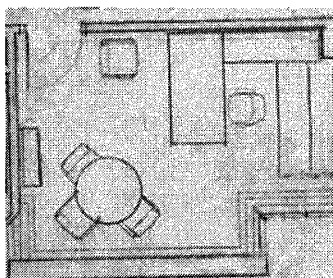
The professional and technical staff of Washington University's Becker Medical Library work closely on projects of interest to the Washington University community related to information access, bioinformatics, networking and telecommunications. Their expertise will be available to support the activities of the OERC. Physical resources such as space, equipment, supplies and data storage are also readily available. Paul Schoening, the library director, is active in the Association of American Medical Colleges, Association of Academic Health Science Libraries, and Group on Information Resources. He meets regularly with Ms. Kelly to discuss both library programming and broader vision of the future of libraries.

Ms. Kelly is a member of the library's senior management staff. As the Assessment and Evaluation Liaison for the MidContinental RML. She attended the ArcGIS training offered by the NOMC in Indianapolis IN in 2003. She is comfortable with the technology and understands the mechanisms that are used to create maps from data acquired from external sources. Ms Kelly has created maps using the NOMC system for internal RML use to review how MCR data entered in the OARF system is reflected visually in the region, in states and by various populations.

The library has a record of grants stewardship since the mid 1960s when it participated in the NLM Health Sciences Library Associates program for medical librarians. Wayne Peay, now Director of Eccles Health Sciences Library, was a trainee at Washington University. The HEW Bi-state Regional Medical Program

funded, through Becker Library, to implement a hospital medical library and information network in the region during the early 1970s. Becker Library participated in the program through placing microfiche readers and catalogs in local hospital libraries. In the 1980s Becker Library developed the software for Octanet, a system which served as a model for what became Docline. Barbara Halbrook and Simon Igielnik at Becker were recognized for their accomplishments relating to Octanet with the Frank Bradway Rogers Information Advancement Award. More recently Becker Library has been the recipient of several LSTA and IMLS grants for digital preservation of historic and archival materials. (http://beckerweb.wustl.edu/medlib/becker.nsf/WV/68C0A19CF82F327E86256F A500510142?OpenDocument). Becker also received funding from the MidContinental RML to support an investigation of institutional repositories using DSpace. The process and results were shared with all resource libraries in the RML and led to several libraries beginning their own repositories.

Becker Library has served as a Resource Library in the MidContinental RML since 2001, and has supported the evaluation efforts of the RML through the work of the Assessment and Evaluation Liaison. Betsy Kelly, the incumbent Liaison, has an MLS from Indiana University and an MBA from Washington University. She has worked as a Medical Librarian for almost 30 years, the first three as Extramural Coordinator, providing outreach services, for the Kentucky Ohio Michigan Regional Medical Library (1976-79). **Ms Kelly** also was chosen in a competitive application process to participate in the intensive two week University of Illinois, Urbana Champaign Outcomes Institute in July 2003. The institute was funded by the Institute for Museum and Library Services to train librarians in outcomes based evaluation.

As evidence of her experience and ability to conduct evaluation planning, analysis and data synthesis Ms Kelly
- Coordinates NN/LM MCR efforts for Assessment and Evaluation
  Ms Kelly introduced logic models for planning tools and has worked with RML staff to create and use logic models for planning and carrying out programs to meet the RML's goals.
- Develops ongoing program of assessment and evaluation
  Ms Kelly created a web based system Activity Report System (ARS) for capturing and reporting the work of the region's liaisons. The system is used to generate quarterly reports for the NN/LM and by liaisons to track their work against the logic models created during the annual planning process.
- Identifies regional needs and opportunities for program development
  Ms Kelly developed and administered questionnaires and organized focus groups to obtain baseline data about network members and solicit input from the membership about needs and services for the region
- Utilizes the capabilities of the internet to conduct targeted surveys
  Survey Monkey has been used to obtain liaison input about working in a

distributed RML. It will be used in the Summer of 2005 to administer the second Network Data Inventory, to query members about the new RML website and for other projects aimed at soliciting member input

- Collects anecdotal evidence
  Written monthly reports from the first two years, reports submitted by awardees and the comments submitted by liaisons as part of their ARS records all provide information that is used to guide the RML in program development and evaluate the effectiveness of its activities
- Evaluates the quality of services to demonstrate the value of network membership
  Data provided through questionnaires, update sessions, course evaluation forms, focus groups and other means are analyzed to create a picture of the successes of the RML and the benefits realized through membership in the regional network.
- Creates and maintains web pages relating to assessment and evaluation for the MidContinental RML site (http://nnlm.gov/mcr/evaluation)

The Geospatial Information Systems and Science Advisory Committee at Washington University "oversee(s) the effort to develop a more systematic approach to GIS use and support in teaching and research, to promote faculty interactions and sharing of ideas and methods." The committee is made up of faculty from the Library, Anthropology, Computer Science and Engineering, Earth and Planetary Science, Networking Technology Services, Architecture and others. Two symposia have been held introducing the community to GIS through presentations, GIS workshops, and a poster session. Through the GIS web site the University coordinates training and support for the use of GIS systems and publicizes the University wide site license to GIS related software. The University has hired a University GIS Coordinator. This person supports faculty, researchers, librarians, technical staff, and students in the use of GIS software.

Because Ms. Kelly already has a solid working relationship with the MidContinental RML staff and because the OERC is tied contractually to the MidContinental region MCR staff will serve as a valuable resource in testing classes, surveys, reviewing articles and materials written for publication. The MCR staff has a history of using evaluation models in their work and their experience will help the OERC understand how evaluation can be more broadly applied within all the RMLS.

RML staff from all regions and from the National Library of Medicine National Network Office will be encouraged to participate in OERC training, consult with OERC staff in developing course evaluations, surveys and other evaluation instruments and while assisting Network members and community outreach partners in preparing and reviewing funding proposals.

Appendix A
Washington University Memorandum of Agreement

NATIONAL NETWORK OF LIBRARIES OF MEDICINE
MIDCONTINENTAL REGION
RFP NLM 05-103/VMW

Memorandum of Understanding

The National Library of Medicine (NLM) recognizes the importance of planning and evaluation as integral components of NLM-sponsored outreach efforts. Good planning and evaluation can help assure that outreach activities are designed and implemented in an effective and efficient manner, achieve stated goals, and contribute to the growing knowledge base about outreach related to health information. The NN/LM Outreach Evaluation Resource Center helps meet the outreach evaluation needs of the entire NN/LM, and in so doing works with all RMLs, various Network members and other organizations as appropriate.
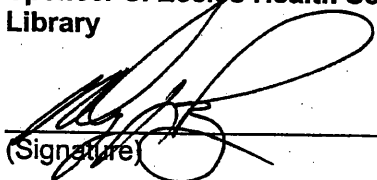
Washington University, Becker Medical Library agrees to serve as Outreach Evaluation Resource Center (OERC) in the MidContinental Region of the National Network of Libraries of Medicine through the term of the University of Utah NN/LM contract with the National Library of Medicine. The current contract period is May 1, 2006 – April 30, 2011. As the OERC Becker Library agrees to:

1. Provide or arrange for training and continuing education opportunities for NLM, RML and network staff with regard to planning and evaluation of outreach and basic network services;

2. Promote and continue to develop a web site for information dissemination on this topic. The OERC web site will provide documentation of best practices, lessons learned and other evaluation findings;

3. Consult with Network members on specific outreach evaluation projects;

4. Assist on a selective basis in the analysis, synthesis, and reporting of evaluation results, including those of cross-regional efforts;

5. Encourage collegiality and sharing among Network members and other RML staff who have related responsibilities. OERC will facilitate communication among the RML staff identified as regional evaluation consultants. This communication will include, but not be limited to, an e-mail discussion list;

6. Assist with implementation of concepts drawn from the handbook on outreach planning and evaluation;

7. Revise the handbook on outreach planning and evaluation to include concepts related to collaboration with community-based organizations, participatory evaluation and program logic models;

8. Assist and coordinate the evaluation-related activities of RML staff identified as regional evaluation consultants;

9. Assist as needed with the evaluation efforts undertaken by other NN/LM centers;

10. Participate in a review of the center, to be conducted at least once during the contract, by selected representatives from NLM and the RMLs; and

11. Obtain services for the development of presentation-quality maps of NLM's outreach projects and NN/LM's outreach activities with data retrieved from existing web-based applications.

This agreement may be amended by written mutual consent, or terminated anytime by Becker Library or the National Network of Libraries of Medicine, MidContinental Region by giving 60 days written notice.
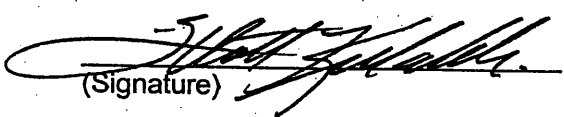

FOR

University of Utah
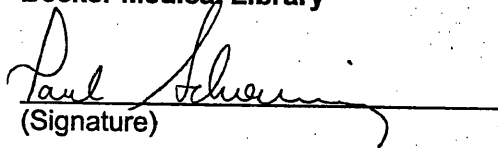**Spencer S. Eccles Health Sciences**   **Office of Sponsored Projects**
Library

(Signature)   (Signature)

Wayne J. Peay   Elliott Kulakowski
Director   Director

Washington University
Becker Medical Library   **Office of Sponsored Projects**

(Signature)   (Signature)

PAUL SCHOENING, ASSOC. DEAN
(Name and Title of Signer)   Kaaren J. Downey
                                                Assistant Director, Research Office

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Appendix B

Washington University Network Technology Services

Washington

WASHINGTON·UNIVERSITY·IN·ST·LOUIS

Network Technology Services

July 7, 2005

Wayne J. Peay
National Network of Libraries of Medicine/MidContinental Region
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East, Bldg. 589
Salt Lake City, UT 84112-5890

Dear Mr. Peay:

I write in support of Washington University in St. Louis Becker Medical Library's
response to the National Library of Medicine RFP. Specifically, I want to address
the RFP requirement for ". . . the development of presentation-quality maps . . ."

Washington University has an energetic, interested and active GIS community
that spans all schools (Arts & Sciences, Medicine, Law, Social Work, Business,
Art and Architecture) and utilizes geospatial and mapping technologies. The
University, in recognition of the growing importance of GIS, is funding a GIS
Coordinator along with the services required to support various
faculty/research/library needs. We are on an accelerated recruitment/hiring
schedule and fully expect the Coordinator position to be filled within the next 4
months. Consulting in map development will be one of several offered services.

I look forward to the opportunity of supporting OERC GIS programming,
consulting and mapping needs to produce maps based on data collected and
stored in the Outreach Activity Reporting System housed on the NN/LM web
servers.

Sincerely,

Jan Weller Assistant Vice Chancellor
and Director   Network Technology
Services

Document added to Final Proposal:
CV for Washington University GIS Coordinator

CONTACT INFORMATION

Aaron Addison
3 Sheffield Court
314 369 6562
St. Charles, MO 63304
addison@caveresource.com

CAREER OBJECTIVE

To utilize my education and professional experience in the exciting and challenging field of GIS. I would also like to assist others in the discovery and application of GIS towards their specific tasks and goals.

QUALIFICATIONS

My experience includes involvement at all levels of GIS operations. I believe that my past accomplishments in project management, spatial systems design, and innovative GIS implementations are a good fit for the GIS Coordinator position. As outlined below, I have extensive experience teaching in various settings and have worked with several projects where collaboration between many departments or organizations was critical to success. I have been an invited speaker at over twelve conferences and have given over forty public presentations on GIS and CAD. I am currently completing my master's thesis on the development of a ArcGIS geodatabase data model for cave science. I am hopeful that by leading this cooperative effort involving researchers from around the world that a usable data model can be implemented to represent the complex nature of caves and karst. These experiences have provided invaluable understanding of the research community and how to achieve success within that community.

PROFESSIONAL EXPERIENCE

2005 – 2001   **Hanson Professional Services Inc.**

Metropolitan Sewer District, St. Louis, Missouri Project manager for $1.2 million Blackcreek Watershed Field Verification GIS project. Responsibilities include oversight of project budget, supervision and coordination of project team member (12) s and sub contractors.

St. Charles County, St. Charles, Missouri. Provided GIS database design and GIS technical support for county wide traffic counts and transportation study. Project was completed utilizing ESRI ArcGIS software.

City of St. Charles, St. Charles, Missouri. . Provided technical project management, database design and GIS technical support for city wide traffic counts and transportation study. Of particular interest, was the use of GIS in the calculation and identification of High Accident Locations (HAL). Project was completed utilizing ESRI software.

Lambert International Airport, St. Louis, Missouri   Provided project management and technical services for GIS attribute information for all as-built utilities on new W1W runway expansion. Responsible for coordination and supervision of field crews collecting attribute data.

Metropolitan Sewer District, St. Louis, Missouri   Provided GIS consulting and programming services in support of MSD Environmental Compliance Division.   Services included data model design, design and programming of mobile forms, and implementation of MS Access desktop database for field data activities.

City of Bridgeton, Bridgeton, Mo.   Provided consulting and programming services for custom applications. Project included the use of ArcObjects and VBA to streamline address locations and custom dialog boxes for attribute presentation.   Responsible for all project management and coordination.

2001 – 2000   **Bentley Systems Inc.**

Indiana Department of Transportation, Indianapolis, Ind. Provided on-site consulting and technical support services. Project included transition of statewide CAD software from legacy system to new technology. Responsible for project planning, consensus building with various internal and external organizations, implementation and project evaluation. Worked on steering committed to create INDOT CAD/GIS user group.

2000 – 1998   **Self Employed as a GIS / CAD Consultant**

City of Austin Public Works, Austin, Texas. Provided project management and coordination of sub consultant.   Also provided custom training and programming services for a system to integrate wastewater overflows in to ArcView GIS and scoring for wastewater work-order prioritization schedules.

Koch Petroleum Group, Corpus Christi, Texas. Designed a spatial data management system for integrating monitoring well readings into an ArcView GIS system. The system allowed reading to be entered into a Palm Pilot and automatically downloaded to the main in-house database.

Kansas Department of Transportation, Topeka, Kan., Missouri Department of Transportation, Jefferson City, Mo., Minnesota Department of Transportation, St. Paul, Minn., Nebraska Department of Transportation, Lincoln, Neb.   Custom designed courseware and provided instruction on MicroStation Descartes software. Lab exercises and student manuals were developed utilizing agency data.

Texas Department of Transportation, Austin, Texas. Conducted introductory CAD user training for MicroStation.

Indiana Department of Transportation, Indianapolis, In. Developed and delivered customized training courses under contract for the Department. Also provided consulting services for support staff.

Des Moines Water Works, Des Moines, Iowa.   Provided consulting services for full-scale GIS/facilities management system. Project included scope development, database transfer, training and implementation services. Coordinated and moderated multi-day organizational sessions.

Oklahoma Gas and Electric, Oklahoma City, Okla.   Provided integration and training for CAD/GIS administrators. Provided assistance for utilizing raster data into daily workflow. Also provided consulting services to integrate CAD / raster documents into a Projectwise document management system.

1998 – 1994   **Magnum Technologies Inc.**

City of Jacksonville, Jacksonville, Illinois Provided training and consulting in the use of a GIS system for a "ground up" GIS in a municipal environment. Project included four separate data sources including MicroStation, AutoCAD, ArcView GIS, and existing tabular data.

City of Bridgeton, Bridgeton, Mo. Provided training and consulting in the use of a GIS system and Microsoft Access database for a "ground up" GIS in a municipal environment. Project included six different data sources.

Missouri Department of Transportation, Jefferson City, Mo. Provided custom training and consulting for more than 350 users that were part of a statewide implementation team assigned to switching production CAD systems.

Monsanto, St. Louis, Mo. Provided on-site training and database customization for facilities management personnel at Monsanto's world headquarters campus.

1994 – 1998   **Civil Engineering Firms (J.T. Blankinship & Associates / Kenneth Balk & Associates.)**

Participated as a team member on various survey, mapping, and civil engineering projects.

ADDITIONAL EXPERIENCE

Cave Research Foundation, Mammoth Cave National Park. Current GIS Director for CRF and the assembly and management of GIS information with regard to the cave systems in the Park. This position requires extensive leadership and coordination between NPS personnel, the research community and CRF personnel. As a part of this position, I have also completed successful grant applications.

The Nature Conservancy, Peoria, Illinois. Provided GIS consulting services for technical needs assessment associated with the upcoming Illinois Natural Areas Inventory project. Also provided research on available datasets relevant to the project. This project has an estimated cost of $8 million.

Belleville Area College (1997), Belleville, Illinois. Instructor for Advanced CAD Design class.

The Karst Conservancy of Illinois, Inc. Past President and current Director

The Lechuguilla Exploration and Research Network. Current Board member.

EDUCATION

B.S. - 1992   Forestry - Natural Resource Management   Southern Illinois University at Carbondale
M.S. - Spring 2006   Geographic Information Science (Candidate)
                       Northwest Missouri State University

WPTC	ArcView GIS	1998
ESRI	ArcSDE Database Management	2001
ESRI	Customizing ArcIMS with AXL	2003
ESRI	Customizing ArcIMS using HTML and JavaScript	2003

Appendix C

Letters of Support

THE NEW YORK ACADEMY OF MEDICINE   1216 FIFTH AVENUE   TEL 212 822-7301

NEW YORK, NEW YORK   FAX 212 423-0273

10029-5293

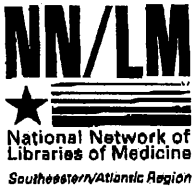*Division of Information Management and Academy Library*

July 7, 2005

Wayne Peay, Director
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East
Salt Lake City, UT 84112-5890

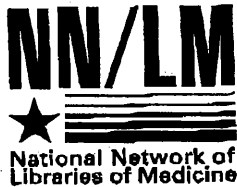Dear Wayne,

The Middle Atlantic Region of the National Network of Libraries of Medicine
(NN/LM) recognizes the importance of planning and evaluation in providing the basic
and outreach programming carried out by the NN/LM. The New York Academy of
Medicine would be pleased to collaborate with you, should we be awarded the
Regional Medical Library contract for the 2006-2011 period and you be awarded the
Outreach Evaluation Resource Center contract, to use evaluation to enhance NN/LM
services and programs.

Sincerely,

Maxine

NN/LM
★
**National Network of
Libraries of Medicine**
Southeastern/Atlantic Region

National Network of Libraries of Medicine
Southeastern/Atlantic Region
University of Maryland ▪ Health Sciences and Human Services Library
601 W. Lombard Street ▪ Baltimore, MD 21201-1512

- (410) 706-2855
- (410) 706- 0099 *fax*
- (800) 338-7657

July 6, 2005

Wayne Peay, Director
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East
Salt Lake City, UT 84112-5890

Dear Wayne,

The NN/LM Southeastern/Atlantic (SE/A) region recognizes planning and evaluation as
important components of the services and programs carried out by our staff and network
members. The Outreach Evaluation Resource Center (OERC) provides support and
guidance in these efforts and is therefore an important component of the Network. We
will gladly collaborate with you should you be awarded the OERC contract.

Sincerely,

Janice E. Kelly
Executive Director

NN/LM
★ ≡≡≡≡
**National Network of
Libraries of Medicine**

National Network of Libraries of Medicine ───────────────
Greater Midwest Region

The University of Illinois at Chicago
Library of the Health Sciences
1750 West Polk Street (MC 763)
Chicago, Illinois 60612-4330

gmr@uic.edu
(800) 338-7657 in region
(312) 996-2464
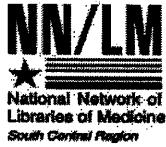(312) 996-2226 fax
nnlm.gov/gmr

July 6, 2005

Wayne Peay, Director
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East
Salt Lake City, UT 84112-5890

Dear Mr. Peay,

The NN/LM Greater Midwest Region recognizes the importance of planning and
evaluation in providing the basic outreach programming carried out by the NN/LM. We
are willing to collaborate with you, should you be awarded the Outreach Evaluation
Resources Center (OERC) contract, to use evaluation to enhance NN/LM services and
programs.

Sincerely Yours,

Susan Jacobson,
Director, NN/LM GMR
University of Illinois at Chicago
Library of the Health Sciences
1750 W. Polk Street, MC763
Chicago, IL 60612-4330

NN/LM

Arkansas   Louisiana   New Mexico   Oklahoma   Texas

13 July 2005

Wayne Peay, Director
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East
Salt Lake City UT 84112.5890

Dear Mr. Peay,

The NN/LM South Central Region, located at the Houston Academy of Medicine-Texas Medical Center Library, Houston TX, recognizes the importance of planning and evaluation in providing the basic and outreach programming carried out by the NN/LM. We are willing to collaborate with you, should you be awarded the Outreach Evaluation Resource Center contract, to use evaluation to enhance NN/LM services and programs.

Sincerely,

Renée Bougard, MLIS
Associate Director

NN/LM

★
**National Network of
Libraries of Medicine**
Pacific Northwest Region
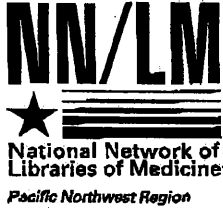
Box 357155
University of Washington
Seattle, Washington 98195-7155
206-543-8262 / 800-338-7657
FAX: 206-543-2469
Internet: nnlm@u.washington.edu
http://nnlm.gov/pnr/

July 6, 2005

Wayne Peay, Director
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East
Salt Lake City, UT 84112-5890

Dear Mr. Peay,

The NN/LM Pacific Northwest Region recognizes the importance of planning and
evaluation in providing the basic and outreach programming carried out by the NN/LM. We
are willing to collaborate with you, should you be awarded the Outreach Evaluation
Resource Center contract, to use evaluation to enhance NN/LM services and programs.

Sincerely yours,

Sherrilynne Fuller

Sherrilynne Fuller
Director, NN/LM Pacific Northwest Region
Director, Health Sciences Libraries

LOUISE DARLING BIOMEDICAL LIBRARY
12-077 CENTER FOR THE HEALTH SCIENCES
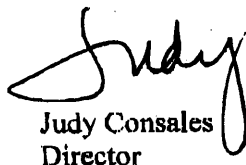BOX 951798
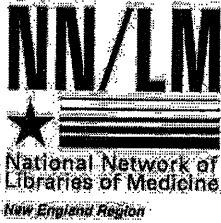LOS ANGELES, CALIFORNIA 90095-1798

July 6, 2005

Wayne Peay, Director
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East
Salt Lake City, UT 84112-5890

Dear Wayne,

The Pacific Southwest Region recognizes the importance of planning and evaluation in providing the basic and outreach programming carried out by the NN/LM. We are willing to collaborate with you, should you be awarded the Outreach Evaluation Resource Center contract, to use evaluation to enhance NN/LM services and programs.

Sincerely Yours,

Judy Consales
Director

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National Network of Libraries of Medicine
New England Region

NN/LM New England Region
University of Massachusetts Medical School
222 Maple Avenue
Shrewsbury, MA 01545-2732

(800) 338-7657
(508) 856-5979
(508) 856-5977
www.nnlm.gov/ner

Wayne Peay, Director
Spencer S. Eccles Health Sciences Library
University of Utah
10 North 1900 East
Salt Lake City, UT 84112-5890

Dear Mr. Peay,   July 12, 2005

The NN/LM-NER recognizes the importance of planning and evaluation in providing the
basic and outreach programming carried out by the NN/LM. We are willing to
collaborate with you, should you be awarded the Outreach Evaluation Resource Center
contract, to use evaluation to enhance NN/LM services and programs.

You should know that Betsy Kelly was a critical component of the workshop on hospital
library evaluation that was offered here in New England this past March. She has set a
precedent for the quality of work to be offered by such a resource center.

Sincerely Yours,

Javier Crespo, Associate Director
National Network of Libraries of Medicine-New England Region
University of Massachusetts Medical School

Appendix D

Summary of Related Activities

SUMMARY OF RELATED ACTIVITIES

The following specific information must be provided by the offeror pertaining to the Project Director, Principal Investigator, and each of any other proposed key professional individuals designated for performance under any resulting contract.

a. Identify the total amount of all presently active federal contracts/cooperative agreements/grants and commercial agreements citing the committed levels of effort for those projects for each of the key individuals* in this proposal.

Professional's Name and Title/Position: Wayne J. Peay, Director

Identifying Number	Agency	Total Effort Committed
1. NO1 LM-1-3514	NLM	20%
2.		
3.		
4.		

   *If an individual has no obligation(s), so state.

b. Provide the total number of outstanding proposals, exclusive of the instant proposal, having been submitted by your organization, not presently accepted but in an anticipatory stage, which will commit levels of effort by the proposed professional individuals*.

Professional's Name and Title/Position: _____

Identifying Number	Agency	Total Effort Committed
1.		
2.		
3.		
4.		

   *If no commitment of effort is intended, so state.

c. Provide a statement of the level of effort to be dedicated to any resultant contract awarded to your organization for those individuals designated and cited in this proposal.

Name	Title/Position	Total Proposed Effort
1. Wayne J. Peay	Director	10%
2.		
3.		
4.		