When To Survey Participants in a Grants to States Project

Surveying of participants in a project receiving IMLS funds through the Grants to States Program may happen to assess the degree of national-level outcomes. Not all projects can reasonably make an attribution of outcomes in surveying participants; it depends on both the project’s *activity* and *beneficiary*.

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| --- | --- | --- |
|  |  | Beneficiary |
|  |  | Library Workforce | General Public |
| Activity | Instruction | Yes if mode is program | Yes if mode program |
| Content | Yes if mode is acquisition or creation | No |
| Planning & Evaluation | Yes | No |
| Procurement | No | No |

What is a Beneficiary, Activity and a Mode?

Let’s actually back up a step and explain the reporting logic in the State Program Report (SPR). Every project is anchored by one “intent” (objective). There are 13 intents in total, but a project can have only one intent. Each intent is associated with at least one activity. There are four types of activities – instruction, content, planning & evaluation and procurement.

Since not all activities are identical, they get partially classified based on their “beneficiary” and “mode.” Beneficiaries are the end-users of the project and can be parsed into two groups – the library workforce and the general public.

By contrast, modes explain how an activity actually gets delivered, created, or experienced. They differ by activity type.

Instruction has three modes with project participants getting surveyed about their outcomes only if the activity involves a program.

**Program**: A type of instruction mode involving formal interaction and active user engagement (for example, a class on computer skills).

**Presentation/performance**: A type of instruction mode involving formal interaction and passive user engagement (for example, an author’s talk).

**Consultation/drop-in/referral**: A type of instruction mode involving informal interaction with an individual or group of individuals (library staff or other professional) who provide expert advice or reference services to individuals, units, or organizations.

Content has six modes. Project participants get surveyed to assess project outcomes only if its mode equals acquisition or creation.

**Acquisition**: a type of content activity mode that involves selecting, ordering, and receiving materials for library or archival collections by purchase, exchange, or gift, which may include budgeting and negotiating with outside agencies (i.e. publishers, vendors) to obtain resources.

**Creation**: a type of content activity mode that involves the design or production of an information tool or resource (e.g. digital objects, curricula, manuals). Includes digitization or the process of converting data to digital format for processing by a computer.

**Preservation**: a type of content activity mode that involves the managerial and financial considerations, including storage and accommodation provisions, staffing, and policy decisions, as well as techniques and methods of maintaining materials in an optimal condition, either in their original format or in a form more durable, through retention under proper environmental conditions or actions taken after an object or collection item has been damaged to prevent further deterioration. Includes digital preservation or the process of maintaining, in a condition suitable for use, materials produced in digital formats, including preservation of the technical metadata and the continued ability to render or display the content represented or described by the metadata. May also refer to the practice of digitizing materials originally produced in non-digital formats (print, film, etc.) to prevent permanent loss due to deterioration of the physical medium.

**Discovery**: a type of content activity that includes bibliographic description, subject analysis, assignment of classification notation, and activities involved in physically preparing the item for the shelf. Also includes providing access via web, mobile, or other application to digital resources (catalogs, e-books and journal collections, subscription databases, archival collections). May also include development of software or hardware for the purposes of storing and/or retrieving information or enabling the act of experiencing, manipulating, or otherwise interacting with an information resource.

**Lending**: activities that involve the provision of a library’s resources and collections through the circulation of materials (general circulation, reserves). May also refer to the physical or electronic delivery of documents from a library collection to the residence or place of business of a library user, upon request.

**Physical**: Medium in or on which information (data, sound, images, etc.) is stored (for example, paper, film, magnetic tape or disk, etc.). The medium may be encased in a protective housing made of another material (plastic, metal, etc.).

**Digital**: Computer-mediated. The term includes commercial or non-commercial hardware, software, and/or data transfer connections and protocols, systems at any scale, and metadata.

For more information, contact a program officer in IMLS’s Office of Library Services or an evaluation officer in IMLS’s Office of Impact Assessment and Learning.