EXHIBIT 2

CLEVELAND PUBLIC LIBRARY

Finance Committee
June 18, 2013

RESOLUTION TO ACCEPT LSTA GRANT TO ADMINISTER KNOWITNOW

WHEREAS, The KnowItNow Suite of virtual services was initiated by Cleveland Public Library and the CLEVNET Consortium in 2001; and

WHEREAS, In July 2004, KnowItNow evolved into a statewide program provided by three (3) equal library partners: Cleveland Public Library, Northeast Ohio-Regional Library System (NEO-RLS) and Cuyahoga County Public Library and was funded for a period of three (3) years with LSTA federal monies awarded by the State Library of Ohio; and

WHEREAS, Pursuant to an evaluation conducted in 2006 by Kent State University School of Library and Information Science, the State Library of Ohio asked that the KnowItNow statewide virtual reference service be consolidated under one organization, Cleveland Public Library, rather than operating as a partnership; and

WHEREAS, For the six (6) Fiscal Years commencing July 1, 2007 through June 30, 2013 the Board of Trustees has accepted the State Library Board's award of LSTA grants to continue this statewide virtual reference service; and

WHEREAS, In May 2013, the State Library Board awarded a LSTA grant in the amount of $298,391.00 to Cleveland Public Library for the continued administration of KnowItNow for the period July 1, 2013 through June 30, 2014; now therefore be it

RESOLVED, That the Cleveland Public Library Board of Trustees accept this most recent LSTA grant in the amount of $298,391.00 from the State Library of Ohio and that the Executive Director, CEO or his designee is authorized to enter into and execute such agreements and instruments as may be necessary or appropriate, including those in excess of $25,000.00, to effectuate the terms and conditions of this Resolution, which agreements and instruments shall be subject to the approval of the Library's Chief Legal Officer; and be it further

RESOLVED, That the Cleveland Public Library Board of Trustees expresses its appreciation to the State Library of Ohio for the continued funding of KnowItNow.

2013 – 2014
LSTA Grant Proposal

Cleveland Public Library
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Submitted by

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KnowItNow24x7
Fiscal Year 2014 LSTA Grant Proposal

❧ Introduction ❧

Cleveland Public Library is requesting LSTA funding for July 1, 2013, through June 30, 2014, (FY2014) to administer KnowItNow24x7, Ohio's collaborative virtual reference service project. Beginning solely as a statewide online chat reference service in 2004, KnowItNow24x7 now incorporates email, instant messaging, and texting (SMS) and offers localized chat, text, and instant messaging options for Ohio libraries. Through the use of technology and the expertise of individual librarians staffing the service, KnowItNow24x7 complements the State Library of Ohio's mission of delivering library services virtually across the state.

Ohio can be rightly proud of the fact that KnowItNow24x7 remains the busiest statewide virtual reference service in the country. From July 2012 through March 2013, librarians working with KnowItNow24x7 handled a total of 41,761 sessions – an average of over 152 sessions every day. Live online chat reference sessions still account for 93% of all patron activity on the service and over 70% of patrons self-identify as K-12 students. Since going statewide in 2004, KnowItNow24x7 has allowed residents of every county in Ohio to initiate a total of well over 800,000 sessions.

Cost Reductions for FY2014

One of the most significant activities in FY2013 was the ability to reduce the budget request for FY2014 by **40%** (over $200,000) through a Request for Proposal (RFP) process for after-hours coverage and reductions in the platform and support areas of the budget.

After-hours coverage costs have been well over 50% of the requested budget for KnowItNow24x7 for several years, and discussions at the May 2012 State Library of Ohio Board meeting addressed this area of concern as well. Additionally, in response to anticipated federal budgetary constraints, the State Library of Ohio placed a cap of $375,000 on the amount of funds which could be requested for FY2014 for KnowItNow24x7. In light of these two specific factors and others, it was decided this year to conduct an RFP process to solicit proposals from vendors for after-hours coverage of the service.

The RFP was posted publicly to the KnowItNow24x7 Provider Site on November 5, 2013, and a link to the posting was sent out over several applicable listservs. The link was also emailed to vendors which had specifically expressed an interest in submitting proposals. By the deadline on December 7, five vendors had submitted proposals. After thoroughly reviewing each proposal and discussing them with Cleveland Public Library management and the Associate State Librarian for Library Development at the State Library of Ohio, it was determined that OCLC QuestionPoint (based in Dublin, Ohio) provided the strongest package with regard to both continuing quality of service and containing costs. Librarians with OCLC QuestionPoint will begin to staff KnowItNow24x7 after-hours beginning July 1, 2013.

❧ Other Selected Activities from FY2013 ❧

On-Going Recruitment, Training, and Educational Initiatives

This year, the Public Library of Youngstown and Mahoning County returned to the KnowItNow24x7 provider network after several years on hiatus. Additionally, the service welcomed Tiffin-Seneca Public Library and the University of Akron as provider libraries.

Nine in-person training sessions were held around Ohio from July 2012 through April 2013. Libraries in Alliance, Akron, Cincinnati, Cleveland, Columbus, Dayton, Rio Grande, and Youngstown hosted either all-day events or staff-development-day presentations.

Collaboration with Kent State University School of Library and Information Science (KSU SLIS) continued in FY2013. One aspect of that collaboration came with KnowItNow24x7 introducing an expanded volunteer internship program. In an effort to provide current students and recent graduates of KSU SLIS with real-world virtual reference experience, the service began offering volunteer opportunities in FY2011. The call for volunteers was again renewed this year and was met with an overwhelming response. As of mid-April 2013, over 20 volunteers have taken their places to staff regular shifts on KnowItNow24x7. The volunteers have handled over 1,000 sessions on the service from July 2012 through March 2013, putting them solidly within the top tier of most-active answering "institutions" along with libraries like Cleveland, Cuyahoga County, Columbus Metro, and Akron-Summit.

During the Spring 2013 semester, KnowItNow24x7 began hosting another KSU SLIS practicum student: Alyssa Darden. Ms. Darden hopes to complete her degree by the end of summer 2013 and is also currently working with OCLC Research and Ohio Dominican University Library. Among other duties, part of Ms. Darden's practicum will be an evaluation (through surveys and other instruments) of the KnowItNow24x7 Provider Site. The resulting suggestions for revisions and additions are planned to be incorporated into the site to make it more user-friendly and informative for those staffing the service.

In an effort to provide consistent training for librarians staffing KnowItNow24x7 across Ohio, the *KnowItNow24x7 Competencies for Operational and Reference Excellence (KIN CORE) Training Handbook* was completed this year. The *KIN CORE Training Handbook* can be seen as a complement to in-person training, an aid to local "in-house" trainers, and a refresher for veteran KnowItNow24x7 providers. The *KIN CORE* will remain a "work-in-progress" to address the changing needs of librarians staffing the service and is available online at http://provider.knowitnow.org/node/74338.

Promotional Activities

Public and academic libraries continue to be encouraged to promote the service at the local level in keeping with the "grassroots marketing" paradigm initiated in 2007; however, K-12 students have always been the largest population accessing the service. With this in mind, KnowItNow24x7 has initiated a partnership with INFOhio to more efficiently communicate what the service has to offer that user group.

An initial fruitful meeting was held this year between the KnowItNow24x7 coordinators and the INFOhio Executive Director and eLearning Specialist to discuss areas of cooperation. Subsequently, the KnowItNow24x7 Statewide Coordinator attended a northeast Ohio regional meeting of school librarians, spoke to the INFOhio User's Council Meeting, and staffed an exhibit table at the OELMA Conference. He also gave a talk at the INFOhio Technical Round Table in April to the 23 regional representatives from around the state. As part of all those activities, attendees were provided with KnowItNow24x7 promotional items to share with students and educators alike. Other meetings and presentations are also planned for the future.

An *Educator Materials* page was added to the KnowItNow24x7 Provider Site at http://provider.knowitnow.org/node/92410 to provide a "one-stop shop" for teachers and school library media specialists with helpful tips, logos for the web, and more. KnowItNow24x7 will continue to explore other areas where collaboration is possible with INFOhio and the larger K-12 community.

Implementation of the Smart Phone Apps

Both iPhone and Android smartphone applications ("apps") for KnowItNow24x7 were released in August 2012. From August 2012 through March 2013, 804 sessions were carried out on these apps, a small fraction (2.1%) of the 37,487 chat sessions handled during that time. While the apps do provide a more controlled environment on which to chat using a smartphone, texting provides a much more efficient method to interact with KnowItNow24x7 on those devices. For comparison, librarians responded to 1,719 text messages from August 2012 through March 2013. That being said, KnowItNow24x7 will continue to monitor activity on the apps but also explore other ways to make use of mobile devices seamless for patrons of the service (See **Exploration of Alternative Virtual Reference Service Software Platforms** below).

❧ Forecast: 2013 – 2014 Activities ❧

New After-hours Coverage Vendor for FY2014

As stated above, librarians contracted by OCLC QuestionPoint will begin to handle after-hours sessions generated from Ohio patrons on July 1, 2013. An added benefit of using QuestionPoint will be the ability to utilize that service on holidays when, in the past, KnowItNow24x7 has traditionally been closed, and this will make the service truly 24/7/365.

Every effort will be made to keep future budget requests near FY2014 levels although some circumstances may lead to an increase in costs in subsequent years (e.g., see **Exploration of Alternative Virtual Reference Service Software Platforms** directly below). As for the after-hours contract, OCLC is aware of historical KnowItNow24x7 after-hours usage statistics and took this into account for the current pricing. They will be assessing *actual* usage over the first half of FY2014, but this should not have any major impact on subsequent after-hours coverage contracts with them and the current contract lists $92,000 as *on-going* costs.

Exploration of Alternative Virtual Reference Service Software Platforms

As of July 1, 2013, KnowItNow24x7 will have been using the SparkRef/Openfire software platform for almost five years to provide virtual reference service to residents of Ohio. In that time, the software has been reliable and flexible in meeting the needs of patrons, librarians, and KnowItNow24x7 administration. Updates and continuing development of SparkRef/Openfire are sporadic at best, and its reliance on Java can also be problematic. While SparkRef/Openfire *may* be the best option available for use by KnowItNow24x7, exploration of alternative virtual reference service software platforms will be conducted in FY2014 to ascertain their strengths and weaknesses in comparison to SparkRef/Openfire. The plan will be to assess features such as the availability of web-based and mobile-friendly interfaces, reporting options, usability issues, etc.

While moving to a new platform may entail increased costs for FY2015, this scheduled exploration in FY2014 will provide solid evidence for either the retention of the existing SparkRef/Openfire platform or the need to move to a new platform going forward.

Alternative Web Conferencing Applications

In light of continued concerns over costs, the **Training** budget line has been eliminated from FY2014's budget request. In previous years, this line has gone towards licenses for web conferencing software. With the

proliferation of free options for limited web conferencing, this alternative has now become a viable choice for small online groups. In light of this, KnowItNow24x7 will be investigating alternative applications for web conferencing during FY2014.

It is important to note that the elimination of the **Training** budget line does *not* mean training will be cut back. In fact, in-person trainings continue to be well-attended and to be the best alternative for introducing new providers to both the software and the customer service skills necessary to staff KnowItNow24x7. These sessions around the state will continue to be a vital component of training librarians to staff the service, and libraries will continue to be encouraged to host these events at their institutions.

2014: Ten Years of KnowItNow24x7

September 7, 2014, will mark the tenth anniversary of the inauguration of KnowItNow24x7 as Ohio's statewide virtual reference service. While that date will fall in FY2015; planning and some celebratory events can take place beginning in January 2014. One possibility is a project similar to one piloted by Maryland's statewide virtual reference service, AskUsNow. Their pilot public-awareness/publicity campaign was inaugurated in March 2013 and encouraged Marylanders to pose with questions they would "ASK" the service. This resulted in marketing materials similar to the American Library Association's READ poster campaign. This could also provide an opportunity to partner with other statewide organizations like INFOhio and OhioLINK. Other decennial anniversary ideas are under consideration.

Continued Collaboration and Sharing of Resources

The collaborations between KnowItNow24x7 and INFOhio and Kent State University's School of Library and Information Science (KSU SLIS) will be continued (and hopefully expanded upon) in FY2014. The volunteer internship program will be continued to provide valuable real-world experience to students and alumni of KSU SLIS, and KnowItNow24x7 looks forward to hosting another practicum student during the upcoming fiscal year.

In addition to continuing to provide resources like the monthly *Newsletter*, the *KIN CORE Training Handbook*, KnowItNow24x7's Delicious links, and the @kin24x7 Twitter feed, KnowItNow24x7 will look for other ways to share pertinent resources and news with librarians staffing the service. Librarians will also continue to be encouraged to share their new finds and valuable skills with their colleagues. Cultivating a "culture of curiosity" within the wider KnowItNow24x7 network can help all those involved to continually improve their customer service and reference skills and keep up-to-date on topics pertinent to patrons of Ohio's statewide virtual reference service.

	2013 – 2014 LSTA Grant Proposal		
	-- Budget Summary for KnowItNow24x7 --		
Line Item	*Description*	**2013-2014 Expenditures**	*Contractor*
	Platform & Support		
1	Software, Hosting, and Support	$15,000.00	Mosio; Cleveland Public Library (CPL)
2	KnowItNow24x7 Statewide Coordinator: Full-time (scheduling, training, planning, promotion, communication, etc.)	$86,000.00	CPL
3	KnowItNow24x7 Web Services Coordinator: Full-time (tech support, programming, server maintenance, etc.)	$83,500.00	CPL
4	Marketing	$6,000.00	CPL
5	Travel, Meetings, and Conferences	$6,000.00	CPL
6	Equipment Program Expenses	$1,200.00	CPL
Subtotal	*Platform & Support*	**$197,700.00**	
	In-Kind Library Service Coverage		
7	Daytime and Early Evening Reference Staff	In-kind	Ohio public, academic, and special libraries
	After-hours Coverage		
8	After-hours coverage	**$92,000.00**	OCLC QuestionPoint
Subtotal	*Lines 1-10*	**$289,700.00**	
	Administration Costs		
9	3% of lines 1-8	**$8,691.00**	CPL
TOTAL	*2013-2014 LSTA Grant Request*	**$298,391.00**	

1. **Software, Hosting, and Support:** This line covers the statewide SMS/texting contract with Mosio, costs of further development and upgrading of the SparkRef/Openfire platform to remain current and enhance reference service, and incidental funds to purchase selected print or digital reference manuals on specific software and programming topics to adequately support and augment the platform. Cleveland Public Library (CPL) supplies hosting hardware (i.e., servers, etc.) as an in-kind contribution for the SparkRef/Openfire platform.

2. **KnowItNow24x7 Statewide Coordinator:** This line covers one FTE (including benefits: OPERS, health insurance, Medicare and life insurance). This position oversees information-sharing and quality control of the service; coordinates implementation of new aspects of the service; recruits additional libraries to contribute staff time to handle sessions; schedules day-time providers; acts as liaison with partners; and organizes, facilitates, and coordinates regional and local efforts to provide training and grassroots marketing efforts.

3. **KnowItNow24x7 Web Services Coordinator:** This line covers one FTE (including benefits: OPERS, health insurance, Medicare and life insurance). This position coordinates configuration and maintenance of the SparkRef/Openfire software, maintains databases and web pages, manages upgrades, provides necessary coding for reports and enhancements, and assists in coordinating daytime and early evening staffing. This person also provides day-to-day technical support for participating librarians and is also on-call after-hours.

4. **Marketing:** This line covers the costs of materials to promote KnowItNow24x7 to the public, educators, librarians, administrators, and other stakeholders within Ohio.

5. **Travel, Meetings, and Conferences:** This line covers the expenses of traveling to meet with local libraries and librarians within Ohio for training, to present and exhibit at conferences and meetings to promote KnowItNow24x7; to explore potential partnerships with regional or statewide virtual reference services; to engage in professional meetings to maintain KnowItNow24x7's reputation and to learn from colleagues; and to share information at local, regional, and statewide meetings to explore recruitment efforts.

6. **Equipment Program Expenses:** This line covers the cost of cell phone and monthly cell phone charges for the Website Coordinator and the Statewide Coordinator and home Internet access for the Website Coordinator.

7. **Reference Staff:** Ohio public, academic, and special library staff will provide reference service during open hours as an in-kind contribution to the service as part of their regular library duties.

8. **After-hours Coverage:** Beginning July 1, 2013, after-hours coverage will be provided by the OCLC QuestionPoint cooperative.

9. **Administrative Costs:** 3%, Cleveland Public Library