



Article

eBooks As a Collection and a Service: Developing a Public Library Instruction Program to Support eBook Use

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Abstract

A majority of United States public libraries now offer eBooks to their patrons. While much focus in library literature has been given to how public libraries license digital content and the various disputes with publishers that this has entailed, much less attention has been paid to users. This article addresses this gap in library literature by providing a case study of Chatham Community Library's adoption of eBooks from a user services perspective. Chatham Community Library is a dual-use public and community college library in central North Carolina. The authors describe the development and evolution of eBook instruction sessions that are now regularly offered at the library and how the staff serves patrons, especially older adults, who use eBooks. The authors also discuss the implications of eBooks for public libraries, how eBooks complement the library's existing print collections, and how eBooks promote transliteracy. Particular attention is given to decision-making and to details that might benefit other librarians developing similar instruction programs.

For public libraries, the growth of eBooks in the last few years is astonishing. Between 2010 and 2011, public libraries increased e-resource expenditures by 184%, with eBooks now being offered by 82% of public libraries, a 10% increase in one year (Miller, 2011). User Services librarians at Chatham Community Library have responded to this change in format delivery by creating new instruction programs. This article is a case study of Chatham Community Library's adoption of eBooks from a user services perspective, with a description of the development and evolution of eBook instruction sessions that are now regularly offered at the library and how the staff serves patrons, especially older adults, who use eBooks. We also discuss the implications of eBooks for public libraries, how eBooks complement the library's existing print collections, and how eBooks promote transliteracy. Particular attention is given to decision-making and to details that might benefit other librarians developing similar instruction programs.

Chatham Community Library is a dual-use public and community college library in central North Carolina. The library is one of three branches of the Chatham County Library System, which serves a rural and increasingly suburban population of almost 64,000 on the edge of North Carolina's Research Triangle, the fastest-growing metropolitan area in the United States. We launched our OverDrive digital library in November 2011 as a member of the e-iNC Library consortium (<http://einc.lib.overdrive.com>), a group of 18 North Carolina public library systems that serve populations under 100,000.

We began developing instructional sessions on using eBooks and eReaders before our OverDrive library officially went live. Amazon announced that it would work with libraries to offer eBooks in September 2011 for Kindle users, who previously could not access library eBooks, and we anticipated a large amount of demand based on this. Although downloading library eBooks has become more streamlined in the past few years, significant barriers still exist to patron access. A bewildering assortment of devices, software platforms, digital rights management (DRM) restrictions and technical issues has made downloading library eBooks much more complicated for patrons than purchasing them from vendors such as Amazon or Barnes & Noble (Pew Internet, 2012).

Development and Evolution of Classes

We offer a variety of computer classes on a rotating schedule at our library, including Microsoft programs, basic computer skills, and special topics such as digital photography and social networking. These computer classes have proven to be one of our most popular ongoing programs, reaching nearly 450 patrons in the last year. Primarily reference staff members teach classes, although circulation staff also teach and assist. We typically have one instructor per class, with at least one "floater" available to walk around and help patrons when issues or questions arise. We have recently expanded our classes to include monthly drop-in sessions in which patrons can

bring eReaders or laptops to receive general computer assistance, or come in for an update after taking an eBooks class. Classes are offered anywhere from three to seven times per month, with at least one of those being an eBooks class.

The majority of participants in our computer classes are older adults. This reflects our changing service population, which includes an increasing number of retirees who are regular library users. Chatham County residents 65 and older make up 18.3% of the population, compared with 13% statewide in North Carolina (U.S. Census Bureau, 2011).

Given these facts, we designed our eBooks class with older adults in mind, by researching literature on instructional design of computer classes for this population. Xie and Bugg (2009) found that computer anxiety and lack of self-efficacy are major barriers to older adults' use of computers (p. 157). Various strategies have been developed to decrease anxiety and increase self-efficacy in older adult computer users in instructional sessions. Mayhorn, Stronge, McLaughlin, and Rogers (2004) recommend providing step-by-step instructions, making sure participants experience success early in the training, and allowing students time to individually practice skills learned in training (p. 200). Van Fleet and Antell (2002) suggest encouraging questions and allowing for plenty of hands-on time with computers, even if the amount of instructional content must be reduced (p. 150).

While targeted toward older adults, we have found that these design practices work for anyone who takes our classes. In a literature review of usability studies on older adults and websites, Redish and Chisnell (2004) found that good design for older adults is often good design for everyone:

Everyone benefits from Web sites...where navigation and information are grouped well; where navigation elements like buttons and links are used consistently and follow conventions; where the writing is clear, straightforward, in the active voice, etc. And much of what makes up good design for younger adults helps older adults as well – and often is even more important for older adults. (p. 7)

We believe that the same principles can be applied to good instructional design; clarity, consistency, and repetition are elements of good teaching for any age group.

Class Structure

When we began offering these classes in November of 2011, we formatted the presentation to include download instructions for the Nook®, Sony Reader™, iPad, and Kindle. We soon learned that covering the download process for all of these devices in one class was not ideal, as the steps for each are very different. This also meant that if we started with the Kindle download process, all of the patrons with other devices were left waiting for us to arrive at their part of the presentation. Another drawback of trying to cover each device in the same class is that presenters must deal with the technological

difficulties that arise for four different devices instead of just focusing on the unique difficulties encountered with each individual device (which can be surprisingly numerous). We eventually settled on splitting classes up by device, which has the unexpected user-centric benefit of allowing our users to help each other during the class.

Because the setup and download process is so different for each device, it is extremely helpful for instructors to be familiar with the devices their patrons will be using. To this end, our library has purchased the most popular models covered in our classes: Apple iPad; Barnes & Noble Nook® Color; Sony Reader™; and Kindle Keyboard and Fire. Because the library owns these devices, staff members have had the opportunity to spend time using each device. This has allowed us to obtain a degree of expertise, or at least familiarity, with each device, which in turn makes us more confident about answering questions and troubleshooting.

These classes have been as much a learning experience for the instructors as they have been for participants. We continue to learn what our patrons need based on questions and issues that arise in each class, and we are constantly adapting the format and content of the classes to make sure we are addressing our patrons' needs. Consequently, the classes have evolved tremendously since we first started offering them, though the general class structure has remained the same. Each class consists of four basic components: general information about the nature of eBooks; hands-on time with eReader devices; search strategies on the digital library website; and a step-by-step demonstration of the download process. OverDrive's policy prohibits downloading on public library computers or devices, so patrons are required to bring their own devices and laptops to class if they wish to download content.

After outlining the agenda and goals of the class, we begin with general information relating to eBooks and gradually get more specific as we talk about the download process for individual devices. We begin each class by asking patrons what they would like to learn during the session. For the most part, their questions will be addressed in the slides we have prepared, but occasionally a patron will draw attention to a certain aspect of eBooks that he or she would like us to discuss in more detail. For instance, a patron might tell us he would like to learn how to adjust the text size on his Kindle; we then know to spend time demonstrating this feature.

We assume that our patrons have no prior experience with digital media for the purposes of these classes, so we spend some time discussing the concept of eBooks and eAudiobooks. A common misconception that we have run across is that because eBooks are digital versions of a book, an unlimited number of patrons must be able to check out the book at the same time. To help patrons understand the concept of "one copy, one user," we make an analogy to the familiar medium of print. A discussion of copyright, digital rights management (DRM), and other licensing issues naturally arises when we talk about lending policies, so we have found this part of the presentation the ideal time to address these issues.

Because the library owns several eReader devices, we are able to offer our patrons the opportunity to try out each device during class. After the instructor demonstrates the features of each device, we encourage participants to turn pages, adjust text size, and explore the device's features themselves. This activity has proved very useful when patrons are unsure of which device to purchase, or when thinking about purchasing an additional device. One participant remarked:

I attended the class to learn about the different devices to help me decide which one would meet my needs so I do not buy the wrong one. I am much more familiar with each one after attending the class today. When I purchase [a device], I would like to take another class.

This hands-on activity also serves to break up the class structure; we have found that alternating between lecture and demonstration portions helps to keep people interested and engaged with the class material.

In the lecture portions of the class, we struggle between offering too much information in an effort to be complete and the need to focus on usable information instead. As librarians, our instinct is often to provide all of the information we possess on a subject, but this can sometimes be overwhelming to patrons. Instead, we have chosen to focus on the pieces of information that will be most relevant to our patrons and address other needs as they arise. For instance, we take a moment to mention options for free, non-library eBooks such as Project Gutenberg (<http://www.gutenberg.org/>) and public-domain material on Amazon, but we do not go into these resources in detail unless our patrons express specific interest. Our goal is to have participants leave the class possessing specific knowledge to accomplish a task, as opposed to having a broad understanding of the many complex topics and issues inherent in eBooks. In this way, our classes are similar to a reference desk interaction, in which we must determine how much information patrons require to satisfy their information needs.

When we show patrons how to search for materials on the live website, we ask them to search along with us on their computers so that they are already comfortable with the site by the time they begin the download process. As we talk about the different methods for finding materials, we again liken these strategies to those used to find print resources. We talk about the difference between searching for something specific versus browsing a collection to see what is available, just as one might in a physical library. Making this distinction helps people make sense of the eBook library and lets them know that they have more than one way to find materials.

Patrons can sometimes experience some frustration when searching for eBooks, simply because our collection is still growing, and because a large percentage of our titles are usually checked out. Because of this, we make a point of providing options for placing holds; finding free, public-domain titles through Project Gutenberg and Amazon; and making purchase suggestions on the library's main website.

Participants are usually eager to download an eBook by this point. Therefore, we move from the general eBooks discussion to step-by-step, detailed instructions on the download process. It is important to show screenshots, coupled with written instructions when necessary, instead of just telling people what to do or giving only written instructions. Being able to see what their screens should look like at each step is essential. We stress the importance of staying together as a group, as we want everyone to be successful at each step. Another important reason for keeping everyone on the same page during the download process is that things can quickly become chaotic when participants needing assistance are at different steps in the process. Despite our best intentions with this instruction, we inevitably encounter participants who are just too eager to wait for the next step.

It is important to avoid jargon and make explicit what tech-savvy librarians are likely to take for granted, especially during the installation and download process. For instance, during the iPad class we initially used the word “app” and referred to the App Store, assuming that iPad users would be familiar with these terms. However, we learned that many users tend not to customize their readers and tablets, especially if the devices were recently purchased, so we should not assume that patrons have ever visited the App Store or even understand what an app is. Likewise, we do not assume that patrons will know to bring their Apple or Amazon login information. To help ensure success in this respect, we send an email to participants two days before each class with a list of detailed instructions and technical requirements. Kindle users, for example, should bring their Amazon account login information, while iPad users should check to make sure they are using the latest operating system. Having patrons set up an Adobe ID for appropriate devices prior to attending class also saves a lot of valuable class time.

After going through the entire download process the first time, we allow time for patrons to try the second download on their own to reinforce what they have just learned and become more comfortable with the process. We hear many comments in the vein of “Can we try that again?” after participants have downloaded their first eBook. Because the first download requires several extra steps (downloading required software, authorizing the software and device, signing in to various accounts, etc.), the second download is quite a different experience and usually runs much more smoothly. Consequently, patrons feel a real sense of accomplishment and self-efficacy as they learn that they are capable of completing the process on their own once they have the tools to do so. Repetition within the class can also be complemented by repeating the class itself; one value of offering a large volume of classes is that patrons sometimes return for a refresher course.

eBooks: A Collection and a Service

Since launching our OverDrive library, we have tried to provide eBooks as a collection and as a service to our patrons. As noted by Polanka (2012), according to research done by *Library Journal*, 23% of eBook patrons in 2011 were unsuccessful in downloading eBooks because of technical difficulty. We believe that the fact that nearly a quarter of patrons try but fail to download eBooks requires public libraries to treat

eBooks not just as a collection, but also as a service supported by librarians. At Chatham Community Library, we provide active, multi-faceted support for eBooks and eReaders that use different formats to reach a variety of patrons in different settings and with different skill levels.

The first component of this support is our instruction sessions. Patrons can register for classes in person, at the library, or over the phone. Our classes are promoted in the library by flyers and by staff, through our Facebook and Twitter accounts, on a countywide email local news digest, and our Friends of the Library group includes our information in their emails.

Patrons can also access all of our class materials through our website where our PowerPoint slides are freely available to download and print: <http://www.chathamnc.org/Index.aspx?page=1688>. The slides act not only as an instructional aid in the course of our class, but a self-help manual that provides step-by-step, device-specific directions on downloading eBooks. These slides have also become a useful tool for circulation and reference staff in assisting patrons with eBook downloads, especially when a patron has questions about a device the staff member is not familiar with. The slides give step-by-step instructions accompanied by screenshots that staff can show to patrons or walk them through over the phone.

We also support eBooks and eReaders outside of scheduled instruction sessions. During our classes, we let patrons know that reference staff is available to help them in person or over the phone with eBook issues. At the reference desk alone, we fielded over 250 questions related to our OverDrive service from January through May 2012. These questions range from simple policy questions (“Do I get late fees on eBooks?”) to more complicated issues with OverDrive software and eReader devices. We also have given numerous mini-tutorials when time allows – walking patrons through the entire download process – and encourage patrons to make appointments for this type of in-depth assistance whenever possible. Several patrons who have attended our eBook classes have returned to the library with follow-up questions, or for help with technology issues. In one case, we even called the technical support number for a device and helped the patron speak with a representative when we realized the device issue was beyond the scope of what we could help with at the library. Having built rapport with patrons during classes, we become their trusted source for help with eBooks and other technology issues.

Having reference staff trained in offering expert support for devices reinforces public services staff's mission of making the library the place patrons think of for getting technology help. However, the sheer number of devices, models, and software versions means we can never be completely up to date on all possible eReader issues. If someone brings in an unfamiliar device or encounters a problem we have not seen before, we try to work through issues with the patron as best we can. Patrons are usually understanding and patient and appreciate the help, and we are able to learn at the same time.

Providing support for eReaders and eBooks through multiple channels (in person, over the phone, and online) as well as in multiple formats (structured classes, drop-in time, one-on-one help, and online self-help) means we can comprehensively support our eBook collection.

Staff Training

While many public libraries have embraced eBooks, building collections and providing support in their use, some have not. Librarians may feel that it is not part of their job to provide technical support for devices, or feel overwhelmed by the variety of devices. Additionally, because of the relative newness of lending eBooks for public libraries, some staff may regard them as a novelty – a relatively unimportant extra product the library offers.

We choose to regard eBooks as a core collection and an essential component of what we offer patrons. Just as we support our print collection by helping patrons find materials on the shelves and providing readers' advisory, we provide support of eBook discovery and usage by helping patrons and training staff to help patrons. Because we are committed to offering eBooks as a collection and a service, our entire staff needs to be on board in supporting this commitment. We are dedicated to making sure every public services staff member can provide a base level of service for eBooks and eReaders through staff training.

In our library, the initial service point is our circulation desk. We follow a tiered service model in which many simple reference interactions (checking title availability, basic readers' advisory, and help accessing databases) are handled by circulation staff. Demonstrating how to search the digital library site, for example, can be performed in a few minutes at the circulation desk. If an information need is beyond the scope of circulation staff, patrons are directed to reference. For example, reference staff can help patrons set up a device for the first time, which can be a fairly complex process. Patrons can also approach the reference desk directly with any questions. Because of this structure, all of our staff, not just reference librarians, needs to have an understanding of eBooks.

Earlier this year, all staff attended an in-service program on eBooks and eReaders organized by the State Library of North Carolina. Later that day, we taught staff the specifics of downloading eBooks at our library. We developed core knowledge competencies for digital services for circulation staff, so all staff are expected to have a base level of familiarity with devices and the digital library website. We have found that the public class we offer proves to be a good instructional tool for our librarians as well. When staff members participate in our public classes, they are able to observe actual questions that arise from patrons and gain a better understanding of how to help them. Librarians from one of our other branches sat in on a class so that they could better understand how to support eBook usage at their library.

Branding

Seventy-five percent of Americans' first association with libraries is books (De Rosa et al., 2010, p. 38). This statistic should not be surprising; while physical libraries of all kinds offer many materials and services beyond books, few as of yet have claimed to be a library *without* books. Public libraries have the ability to define their spaces and the function of those spaces in many ways – materials, programs, displays, and staff behavior, to name a few – but given the strength of the association, books will likely remain the library's brand for some time to come.

However, narrowly defining the library's brand through print books may become a major liability. In his provocative presentation at a 2010 *School Library Journal* conference entitled "Libraries Are Screwed," Eli Neiburger, Associate Director for IT and Production at Ann Arbor District Library, argues that companies that tie their business models to specific media formats (the video rental industry, for example) become obsolete when a format declines in popularity. If libraries continue to make their main business lending print books, they will slowly decline in popularity and importance relative to the adoption of eBooks (Neiburger, 2010). The decline of print for popular materials is rapidly underway: 2012 saw dramatic decreases in sales of paperbacks compared with 2011, and eBook sales surpassed hardcover sales for the first time (Boog, 2012).

eBooks represent a natural progression for public libraries because they complement and expand the book brand. eBooks provide an opportunity to connect the idea of books with technology help and information literacy – services public libraries are increasingly offering. Libraries have historically promoted literacy through materials (e.g., books) and services (e.g., story time). Now, the concept of promoting transliteracy, "the ability to read, write and interact across a range of platforms, tools and media from signing and orality through handwriting, print, TV, radio and films, to digital social networks," is gaining traction in libraries (Ipri, 2010, p. 532).

To build our book brand, we seek to connect eBooks and our digital library with our print collection and the idea of books. To some extent, this is an imposed constraint that we are turning into a benefit. Publishers have sought to make public library eBooks behave as much like print books as possible through DRM (one copy, one user restrictions; HarperCollins' infamous 26-checkouts-per-item rule), so we choose to capitalize on this as a way to make our patrons comfortable with eBooks. As mentioned in the "Class Structure" section above, we make many connections with how our print collection works to help people understand and conceptualize eBooks.

In order to read a library eBook, patrons utilize public computers, personal computers, eReaders, our digital library website, DRM restrictions, and software. Developing these skills enables them to interact more confidently across platforms in other realms. It also positions librarians as the people who can help them navigate these platforms and make sense of the frequently confusing interactions between them. To the extent that we can build this expanded transliteracy/technology/book brand through instruction and

support for eBooks, we will ensure the continued relevance of the public library to our patrons.

Measuring Success

Assessments reveal that our programs have been successful. Since our launch in November 2011, we have had 6,205 downloads by 697 patrons, an average of 8.9 checkouts per e-patron. By one measure, circulation statistics, we have been victims of our own success. In mid-January, 85% of our eBooks were checked out, and our current circulation hovers around 50%. Patrons have expressed many concerns about the limited number of titles available in our digital library. To some extent, this is due to publisher restrictions; four of the Big Six publishers do not license eBooks to public libraries, so our potential title selection is quite limited (Kelley, 2012). Another limit is budgetary, as we only spend a relatively small portion of our collection development budget on eBooks. Our consortium currently offers over 3,100 eBook titles, but there are already 7,095 registered e-patrons in our consortium, meaning we offer only 0.44 books per e-patron. If we accounted for the thousands of library patrons in the areas served by e-iNC libraries who have not yet registered as e-patrons, this number would of course drop significantly. As Polanka (2012) notes in a *Library Journal* survey on patron eBook usage, 44% of public library patrons were unsuccessful in borrowing eBooks because of title unavailability. This is an issue that will need to be addressed by publishers and digital collection developers, but is beyond the scope of this article.

Many of the eBooks classes we offered were fully enrolled at fifteen participants per class. Between November 2011 and July 2012, we taught 20 classes to 197 patrons. The total number of Chatham County patrons registered for e-iNC is currently 885, meaning we have reached approximately 22% of the e-iNC patrons in our county.

We always state at the beginning of our classes that our goal is to have all participants leave the class with a library eBook on their eReaders, and we have been overwhelmingly successful with this objective. A 100% success rate is difficult to achieve, because patrons may enter the class without laptops or have pre-existing technical issues with their devices. Not having the latest iPad OS installed, for example, makes it impossible to install the OverDrive app, and we cannot resolve this issue in the course of the class. For these participants, we still try to offer some feeling of success by teaching them how to navigate the e-iNC website or by offering them the chance to participate in another class once the issue is resolved.

We also measure success in our classes through patron feedback. We originally collected comment cards for every class we taught; we now have patrons fill out a Google form on our website. Feedback has been overwhelmingly positive; comments like “Good presentation – not too complicated” and “Instructors were knowledgeable and patient” let us know that we are meeting people’s needs. Patience, especially, seems to matter to participants. Some of our participants have described previous negative experiences with getting computer help, either formal or informal. We try to remember that the services we offer do not exist in a vacuum; patrons have many other

options for getting technology help. Simply being patient, however, can set us apart from others and build our library brand.

We also have received comments that our class is more helpful to participants than following written instructions on how to download eBooks. One patron commented, “This is a great way to learn how to use eBooks – much easier than simply going to the library website.” Comments like this support our contention that many patrons prefer active instructional support for eBooks. Xie and Bugg (2009) recommend that computer training with older adults employ “instructor- or video-based instead of online manual-based training” (p. 157).

One comment we hear frequently in our eBooks class is, “I came here today so I can learn about this and teach my friends about it.” Anecdotally, we have observed a compounding effect in eBook interest. Class participants are generating more interest in our digital materials through their social networks (retirement communities, friends, online, etc.). This supports the program’s mission of providing the broadest possible access to this collection and also means that we are reaching non-users who may not have been aware that we offer this service.

We also observed that eBooks helped bring people back to the library. We had many lapsed patrons (those with long-expired library cards) come in for eBooks classes. These patrons stopped using the library but are coming back because we are offering this new service. An exciting part of reaching these patrons is that we can then re-introduce them to all the other materials and services we offer, and ideally make them active patrons again. We believe that eBooks can increase usage of our physical space rather than decrease it, as some librarians might fear.

Conclusions

This case study serves as a narrative of our library’s adoption of an OverDrive eBook library collection from a user-centric perspective. We believe our example provides one that other library systems planning to begin lending eBooks or providing instruction for library-provided eBooks can follow. Our slide sets are available on our website (<http://www.chathamnc.org/Index.aspx?page=1688>) for other systems to freely use, adapt, or build upon.

When dealing with eBooks, our priority is the needs of our users. This involves the iterative process of seeing what does or does not work, and changing class content and structure accordingly. Our early attempts in which we tried to cover all the devices in one class were long and tedious, and left many patrons frustrated because they were waiting around to download eBooks; we solved this issue by splitting classes up by device in order to focus specifically on the different features and download procedures of each device. Patrons commented positively about our classes, but felt they would not be able to repeat the process themselves at home. Therefore, we added time for patrons to repeat the download process in order to reinforce what was taught in class. In a recent class, a large proportion of patrons wanted help figuring out how to use

navigation controls on their Kindles, so we spent an impromptu 15 minutes working one-on-one with patrons on devices. Change is constant, and inevitable, as we continue to listen to our users and re-design accordingly.

While the broad themes of this case study can be applied to any library, the specifics of our situation limit our ability to draw far-reaching conclusions. There are several claims we make in this article that merit further research. We contend that eBooks expand usage of our library: more patrons, more circulation (online and in print), and more use of services (other instructional sessions, one-on-one reference help). We believe there is librarian anxiety that use of the physical library may decline if patrons are offered convenient eBooks that can be accessed from home. A well-designed study on the effects of eBook collections on library visits would be an interesting response to these fears.

We also believe that our classes are effective not only in the course of the session, but that they enable patrons to continue using library eBooks at home. However, we have not conducted assessment activities to find out how many people in fact continue using library eBooks after taking our class, or how successful class participants are at completing the download process at home. We would be interested in seeing a longitudinal study of patron usage of library eBooks to study this further.

Another open question is how librarians can offer the best collections of library eBooks to patrons, given the restrictions from publishers and budgets. A study of eBook collection development to identify best practices including what kinds of materials to collect, how to identify high-interest titles from smaller publishers that will deal with libraries given the unwillingness of most larger publishers to work with libraries, and the value of consortial borrowing arrangements for public libraries, would help librarians decide how best to allocate limited funds to build eBook libraries.

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