



**ГЛОБ@ЛНИ  
БИБЛИОТЕКИ**

**BULGARIAN LIBRARIES –  
ACCESS POINTS TO  
INFORMATION AND COMMUNICATION  
FOR ALL**

---

28 Khan Krum Str., 1st floor, Sofia, Bulgaria  
Land line: (+359 2) 98-99-088, Fax: (+359 2) 98-12-708  
e-mail: [office@glbulgaria.net](mailto:office@glbulgaria.net)

[www.glbulgaria.bg](http://www.glbulgaria.bg)

---

## Charitable Purpose

To provide easy and equitable access to information, knowledge, communications and electronic services at public libraries via free use of the Internet and other ICT, helping Bulgarians integrate into the global information world, improve their quality of life and enhance civil society.

## Program Description

Based on library, training and outreach needs assessments conducted in 2008, the proposed 4.5-year program strives to enhance access to information and e-services for Bulgaria's general population. The program shall enable computer and Internet use by visitors at 900 public libraries in both large and small towns and villages countrywide. The program partners will seek to include another 700+ libraries, by raising additional funding in the course of the BMGF country grant implementation. Approximately 3,000 librarians will be trained in computer literacy, library service delivery and library management.

The program shall address the needs of ordinary Bulgarians through enhancing service delivery at public libraries. Target libraries are expected to transform, becoming more attractive to users and expanding their population reach and community work. The program will foster fundraising and advocacy, so that public libraries evolve as societal change agents and knowledge hubs. The program envisages a relatively balanced geographical spread, to help eliminate the ubiquitous intra-regional development disparities across the national territory. The grant and post-grant phases rely on a multi-agency platform uniting government and third sector partners in their efforts to modernize Bulgaria's public libraries network.

## Glossary

ABLE	American Bulgarian Library Exchange
ACP	Advisory Committee on Procurement
ADSL	Asymmetric Digital Subscriber Line
BLIA	Bulgarian Library and Information Association, until November 2008 Union of Librarians and Information Services Officers (ULISO)
CAP	Contracts, Assets and Procurement Committee
DC	District Coordinator
DEX	Direct Execution
EU	European Union
GDP	Gross Domestic Product
ICT	Information and Communication Technology
IPAF	Impact Planning Assessment Framework

---

ISP	Internet Service Provider
IT	Information Technology
ITB	Invitation to Bid
LAN	Local Area Network
MC	Ministry of Culture
NA	Needs Assessment
NAMRB	National Association of Municipalities in Republic of Bulgaria
NATMSA	National ATM Network of the State Administration
NEX	National Execution
NGO	Non-Governmental Organization
NPD	National Program Director
PB	Program Board
PCC	Project Contracts Committee
PC	Public Council
PM	Program Manager
PMC	Program Management Committee
PMU	Program Management Unit
PO	Program Officer
RFP	Request for Proposal
RFQ	Request for Quotation
SAITC	State Agency for Information, Technology and Communication
SBAA	Standard Basic Assistance Agreement
SDSL	Symmetric Digital Subscriber Line
TCO	Total Cost of Ownership
TNA	Training Needs Assessment
TOR	Terms of Reference
WG	Working Group

---

## Grant Proposal – Narrative

### 1. Background and Rationale

#### 1.1. Bulgaria and Its Public Libraries Network

##### 1.1.1. Background on the Republic of Bulgaria

Bulgaria (capital city – Sofia; total area 111,000 km<sup>2</sup>; population of 7.7 million) sits on the Balkan peninsula of South-Eastern Europe. Bulgaria is a middle-income country, which joined the European Union (EU) in 2007. The period between 1947 and 1989 was marked by communist regime and centrally planned economy. Transition to democracy and a market-based economy occurred in the 1990s. Currently, Bulgaria is a parliamentary republic. A 240-member National Assembly is constitutionally the highest state authority. The President is the head of state, and the executive power (Council of Ministers) is led by a Prime Minister.

The national territory is divided into 264 municipalities divided into 28 administrative districts. There is an average of 9 municipalities per administrative district. Each administrative district has a city that serves as a district center, and also as center of the respective municipality. The city of Sofia is the center of two administrative districts – Sofia City and Sofia District.

The municipal council is the legislative body of the local self-government in the municipality. Municipal councilors are elected by the citizens of the municipality for a 4-years term in direct proportional elections. The municipal council defines the municipal development policy, solves local problems that are not in exclusive competence of other authorities, and adopts decisions for management of the municipal property. The mayor of the municipality is the executive body of the municipality who manages the municipal administration. The mayor organizes the implementation of municipal policy in line with the Constitution, national legislation and the official documents issued by the municipal council.

Settlements in Bulgaria are two types – towns and villages. Towns can be either urban settlements serving as administrative district centers (28 in total, each with a population ranging from 30,000 to 400,000<sup>1</sup>), or urban settlements that are not administrative district centers. Villages are not administrative district centers but can be municipal centers. There are no officially set population size thresholds for designating a settlement as a town or a village.

On average, one municipality includes 26 settlements (towns and villages) and has a population of circa 30 000 people. With regard to their territory, municipalities vary from small (44.4 km<sup>2</sup>) to big (422 km<sup>2</sup>).

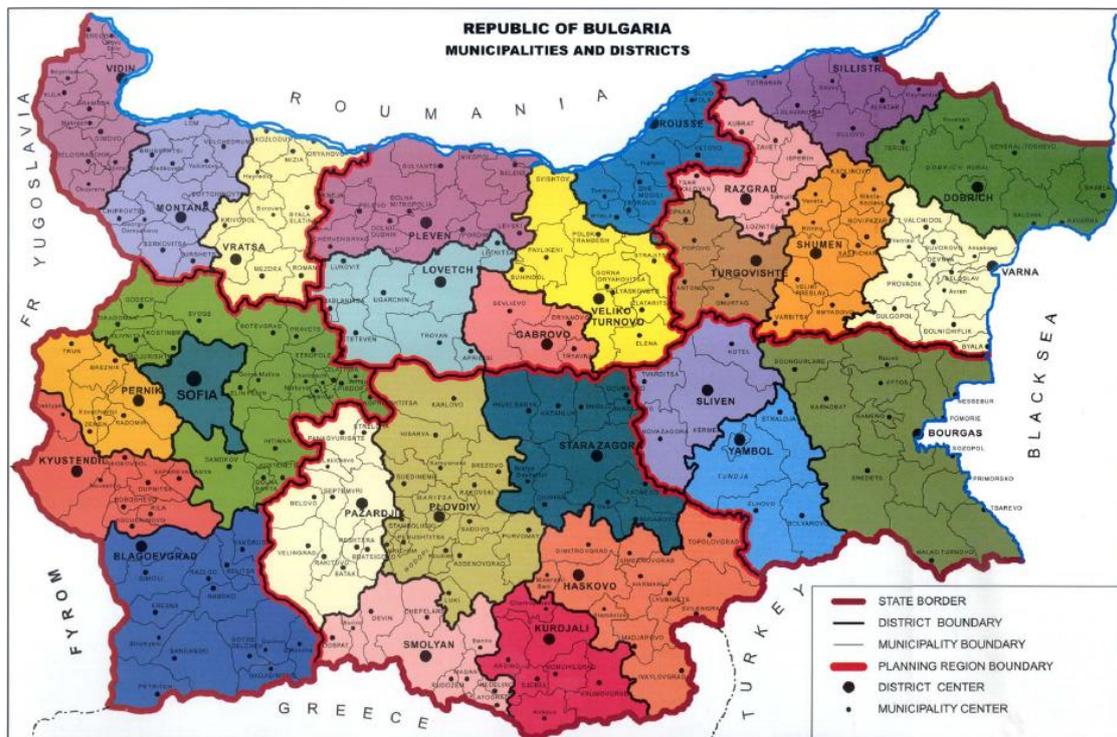
In terms of population, area and number of settlements, Bulgaria's municipalities are as follows:

---

<sup>1</sup> The City of Sofia which is also an administrative district has a population of approximately 2,000,000 people.

Municipalities (population)	Municipalities		Population		Territory		Settlements	
	number	(%)	thousands	%	sq. km	%	number	%
Below 5 thousand	31	11.4	101.5	1.3	6,086.9	5.5	282	5.3
From 5 to 10 thousand	69	26.2	509.5	6.4	26,657.3	24.0	955	17.9
From 10 to 20 thousand	77	29.3	1,104.0	14.0	24,762.1	22.3	1563	29.3
From 20 to 30 thousand	33	12.6	812.4	10.3	15,939.7	14.4	777	14.6
From 30 to 50 thousand	21	8.0	770.1	9.8	16,270.7	14.6	599	11.3
From 50 to 75 thousand	14	5.3	884.4	11.2	8,701.0	7.8	646	12.1
From 75 to 100 thousand	8	3.0	692.4	8.8	4,718.5	4.3	230	4.3
From 100 to 300 thousand	8	3.0	1,177.1	14.9	6,177.3	5.6	236	4.4
From 300 to 1,000 thousand	2	0.8	661.1	8.4	339.5	0.3	7	0.1
Over 1 million	1	0.4	1,178.6	14.9	1,348.9	1.2	38	0.7
<b>Total</b>	<b>264</b>	<b>100</b>	<b>7,891.1</b>	<b>100</b>	<b>111,001.9</b>	<b>100</b>	<b>5,333</b>	<b>100</b>

Bulgaria's administrative division is presented on the map below:



Source: National Association of Municipalities in the Republic of Bulgaria

According to the national definition used for planning of EU financial support, rural municipalities are those having no settlement with a population size over 30,000 people. Thus, 232 of Bulgaria's 264 municipalities are classified as rural. They cover 81% of the national territory and are the home of 42% of Bulgaria's population. The municipal centers (rural towns or big villages) in rural municipalities host the providers of certain basic services for the entire municipality – secondary and/or vocational schools, health care centers, bank offices. Rural towns are evenly spread throughout the country.

There is an uneven dispersal of urban towns across the national territory, and related to it different access to specialized services, science, education and culture, etc. The remoteness of a large portion of Bulgaria's rural areas from large urban centers results in socio-economic disparities both intra-district and among districts.

---

About 40% of Bulgaria's rural municipalities are small (population below 10,000 people), and in this group almost one third have less than 5,000 people. Small rural municipalities have significant problems with maintaining the range and quality of services for the population, and therefore are more vulnerable to demographic decline.

### 1.1.2. The National Public Libraries Network

There are four categories of public libraries in Bulgaria:

- *St. St. Cyril and Methodius National Library* - this is the largest public library; it provides services, replicated by other libraries; such as cataloguing Bulgarian literature, maintaining current and retrospective national bibliography, as well as international interlibrary book exchange; it does not support the majority of public libraries directly;

- *27<sup>2</sup> district libraries* – these provide library information services in their respective administrative district and have coordination and methodological functions vis-a-vis the chitalishte and municipal libraries in their respective district. District libraries form the backbone of the national territorial library information services network and are the most developed public libraries in the country. The Ministry of Culture assumes responsibility for coordination and methodological guidance of Bulgaria's public libraries network through the 27 district libraries;

- *2,682<sup>3</sup> chitalishte libraries with over 2,000 volumes of book-stock each* - these libraries are closest to the general public and the neediest population groups; the level of chitalishte libraries is not uniform across the country and some are developing quite well, while others are lagging behind.

The chitalishte are a unique Bulgarian phenomenon, which dates back to the 19<sup>th</sup> century. Initially organized and supported by their communities as libraries, reading-rooms and social spaces, with time the chitalishte developed as local educational and cultural institutions. There is a chitalishte in every Bulgarian town and almost in every village. Each chitalishte has its own board and, usually, is housed in a centrally-located building. Traditionally, the chitalishte have been involved in culture and education, whereby library services have been a core activity. Since the 1990s, the difference in quality of library services at the chitalishte has been growing. In the last ten years, some chitalishte have evolved very successfully as local organizations active in community development. At present, chitalishte are registered as autonomous non-profit legal entities, and continue receiving a subsidy from the Ministry of Culture through the municipal budget.

- *19 municipal libraries* have been developed by the local authorities as local cultural institutions financed by the municipality. Municipal libraries receive regular financial support which ensures better development of services than in the chitalishte libraries. Municipal libraries have been established in response to local preferences, and there is no relationship between the population size of the municipality and the existence of a municipal library.

The set up of a system of public libraries (including the chitalishte libraries) across the national territory started in the 1970s, during the years of centrally planned economy. Considerable resources were invested in premises, equipment, library collections, training and coaching of

---

<sup>2</sup> The District Library of Sofia serves two administrative districts - the City of Sofia and Sofia District. This is why there are 27 district libraries serving 28 administrative districts.

<sup>3</sup> According to 2006 data of the Ministry of Culture. However, according to the register of chitalishte at the Ministry of Culture, Bulgaria's chitalishte are 3,391.

---

library staff. Developments since transition to a market economy in the 1990s have not been favorable to public libraries and to their present functioning as a system.

### **1.1.3. Stock-taking of Public Libraries during the Planning Phase**

The Program Management Unit (PMU) conducted in May 2008 a rapid stock-taking of public libraries, to identify all currently functioning libraries in the country. A team of library experts reviewed all available sources: the database of the Ministry of Culture, the database of the Bulgarian Library and Information Association (BLIA<sup>4</sup>) and data from the National Statistical Institute. The experts came up with a list of 2,520 public libraries that had been active in the period 2005-2007. The list was then reviewed and adjusted against several groups of indicators: library performance, demographic and economic data, and availability of schools and NGOs locally. The list was also cross-checked by the program's 28 District coordinators<sup>5</sup>, and libraries that had not submitted statistics over the past couple of years were removed from the list. Finally, the list was consulted with experts at the National Association of Municipalities of the Republic of Bulgaria (NAMRB). As a result, the list of public libraries to undergo needs assessment was shortened to 2,351 (approved by the Project Board<sup>6</sup> on 9 June 2008).

### **1.1.4. Library Needs Assessment during the Planning Phase**

A library needs assessment (NA) was conducted in the period from June to August 2008. Each library was visited by a team composed of a librarian and an ICT specialist, who completed a detailed questionnaire.

The NA collected information on the performance, premises, hardware, software, Internet connectivity, human capital needs and renovation needs of 2,351 public libraries. The number of libraries subject to NA was considerably (by 60%) bigger than the number envisaged in the planning phase proposal (up to 1,500). This approach was consulted with and approved by the Foundation, due to the anticipated high added value of the NA for Bulgaria.

A database was constructed on the basis of the collected questionnaires and was subsequently analyzed by a core team of 4 library experts, 2 ICT specialists and 1 sociologist. The team worked with the PMU and the program partners to establish six different packages for hardware/software support to the assessed libraries. The packages are presented in detail in Section 3.4.

The NA is the largest so far on-site survey of Bulgaria's public libraries. The data obtained is the most comprehensive available snapshot of the library network in Bulgaria to date. The NA results have been used not only for the planning purposes of the Global Libraries program, but can also be beneficial to policy makers and researchers in the field (e.g. data on library equipment status, financial status and library staff skills are being used in the drafting process of the legislative framework for libraries). The NA results will be strategically important for Bulgarian authorities in their efforts to design a national information society strategy and plan the development of the public libraries network in the country.

---

<sup>4</sup> BLIA was known as Union of Librarians and Information Services Officers until November 2008.

<sup>5</sup> 28 District coordinators from the district libraries were hired to support the program activities under PMU supervision in May 2008.

<sup>6</sup> The Project Board is further discussed in Section 5 Organizational Capacity and Management Plan, Sub-section 5.2 Program Management Levels and Reporting Lines.

The table below shows the distribution of assessed libraries according to the type of settlement:

	<b>No. of libraries</b>	<b>%</b>
28 administrative district centers	27 - district libraries	1.1
28 administrative district centers	218 – chitalishte libraries	9.3
Other settlements (towns and villages) – over 5,000 people	159 – chitalishte and municipal libraries	6.8
Other settlements (towns and villages) – between 2,000 and 5,000 people	285 – chitalishte libraries	12.1
Other settlements (towns and villages) – between 1,000 and 2,000 people	502 – chitalishte libraries	21.4
Other settlements (villages) – between 500 and 1,000 people	564 – chitalishte libraries	24.0
Other settlements (villages) – under 500 people	596 – chitalishte libraries	25.4
<b>Total</b>	<b>2,351</b>	<b>100.0</b>

Some key findings from the NA are that:

- ✓ 78% of public libraries are chitalishte libraries located in villages, where they are the only place for information and culture;
- ✓ District and municipal libraries are much better and more regularly supported by the state and the local authorities than chitalishte libraries;
- ✓ There are higher numbers of functioning libraries in administrative districts that are economically more developed;
- ✓ 57% of the assessed libraries have only one appointed staff member with multiple responsibilities, including chitalishte and library operations;
- ✓ 59% of the assessed libraries have no Internet access in their buildings;
- ✓ 23% offer computers with Internet to the public; this includes all 27 district libraries, some well developed chitalishte libraries in settlements with population over 5,000 and several chitalishte libraries in villages; however, in most cases, these libraries have only one computer which is shared by library staff and library users;
- ✓ 83 % of the assessed libraries do not have a printer and 95% do not have a scanner;
- ✓ Only 11 libraries offer specialized devices for disabled people.

According to the needs assessment, there are two groups of public libraries in Bulgaria:

- 27 district libraries and circa 50 other (chitalishte and municipal libraries) that have been striving towards modernization and state-of-the-art technologies, benefitting from central and local government support;

- 
- libraries that are not capacitated to meet the information needs of their communities - most chitalishte libraries fall into this category, and 78% of them are located in villages.

## **1.2. Problem Statement**

### **1.2.1. The Context**

Living standards in Bulgaria are not high which results in a not sufficient rapid spread of computers and Internet. Bulgaria is the poorest of all 27 EU member states, with a GDP per capita at 32% of the EU-25 average.

While there is a decreasing trend of the overall poverty rate, the benefits of good economic performance are unevenly distributed. There are disparities among income groups, among regions, and between urban and rural settlements intra-regionally. Ten (10%) of the population receives 40% of the national income.

### **1.2.2. Problems To Be Addressed through the Program**

#### *Digital divide and an underdeveloped information society*

Regardless of its status of a middle-income country, Bulgaria continues to experience a persistent digital divide. Public access to computers and the Internet, as well as effective ICT use (“real access”) are insufficient, uneven across the territory, and inequitable among population groups. At the same time, the global and national web contents are growing fast, and are increasingly relied on by the authorities and the society as channels for access to information. This constitutes a vicious circle, which can be interrupted by enabling a wider and more effective access to ICT for the general population.

However, the community of Bulgaria’s public libraries is currently incapacitated to address the problems of digital divide and underdevelopment of Bulgaria’s information society. Via enabling public access to the Internet and ICT for the general population through public libraries, the digital divide in Bulgaria can be bridged. This notion is supported by the program partners.

The Bulgarian state agencies publish on their web sites growing volumes of relevant information and develop e-government services. The official portal of the European Union is now available in Bulgarian with all the legislative, social, business and educational information of the union. Two-thirds of the Bulgarian population remains isolated from such vital information channels.

In Bulgaria, Internet is primarily used for email, music downloads and entertainment but not for online services provided by the public and private sectors. It is expected that public libraries will promote a more effective and diverse use of the Internet.

#### *Settlements and citizens facing information deprivation*

Over 40% of Bulgaria’s population resides in rural areas, where many of the settlements are geographically isolated or economically depressed towns and villages. Still at present, their inhabitants have radio, a few TV channels and telephone as their single means to access information and “connect” to the global world. As the population in such smaller towns and

---

villages is generally poor and therefore not mobile, free access to the Internet and ICT at public libraries would be very beneficial, contributing to more opportunities and a better quality of life.

*The majority of public libraries not offering computers and Internet access to their users*

Being closest to the general population and covering the entire national territory more or less evenly, Bulgarian public libraries would be the most natural place for citizens to access information, services and opportunities, offered through the web<sup>7</sup>. However, the majority of public libraries do not have computers, nor skilled staff able to assist with real access to information. According to the library needs assessment, 77% of the assessed public libraries do not offer Internet access to their users due to lack of computers for users at the library.

*Library workers not skilled to offer ICT-related support to their users*

The needs assessment revealed that library workers - except staff at district libraries and some chitalishte libraries - are not prepared to offer ICT support and Internet search assistance to users. Library workers at 52% of the assessed libraries do not possess any library qualification<sup>8</sup>, and 43% have never used computers.

*Insufficient subscription-based information and locally generated content*

According to the citizen forums and focus groups conducted during the programs planning phase, the Bulgarian public does not have enough access to subscription-based full-text online databases (e.g. legal information online resources). The analyses also showed a need to assist with access to reliable and qualitative information sources at public libraries, not just information in general. Local content in Bulgaria is scarce. Few of the 2,351 surveyed libraries have web sites of their own and offer local content on their websites: news, calendar of events, directory of local organizations, creative works gallery, etc. Local content on the official municipal sites is limited to some administrative information and minutes of municipal council meetings. As a whole, communities do not have opportunities for self-presentation on the web.

*Lack of information literacy skills of the general population*

The citizen forums and focus groups conducted during the program's planning phase revealed that general users do not possess enough information literacy<sup>9</sup> skills to search and evaluate information, so there is a clear need for library workers to become able to assist library users in that. Due to the scarcity of print and electronic resources, Bulgarian citizens do not have an understanding of the whole spectrum of information formats, types of sources, and search tools of today's information age. Therefore, their research experience is limited and partial. Hence, the opportunities for personal development and education are not fully utilized. The analyses also showed a need to assist users with access to reliable and quality information sources at public libraries, not just with information in general. School children and students, for example perceive

---

<sup>7</sup> Public libraries in small settlements are regarded by ordinary people as the preferred locations for access to computers and the Internet (2005 and 2006 E-Bulgaria Reports). However, in 2005 only 3% of the municipal, district and chitalishte libraries were able to offer Internet access to the public.

<sup>8</sup> At present, public librarians in Bulgaria have the following types of qualification: Masters Degree in library science, Bachelors Degree in library science, six-month postgraduate library qualification for bachelors /masters in other disciplines, 45-day library course for secondary school graduates.

<sup>9</sup> UNESCO's Information for All Program defines information literacy as the capacity of people to "recognize their information needs; locate and evaluate the quality of information; store and retrieve information; make effective and ethical use of information, and apply information to create and communicate knowledge"(<http://portal.unesco.org>).

---

sources in Google and Wikipedia as the ultimate truth, being unaware that these sources are vast and not always verified.

### **1.2.3. Summary of Existing Efforts in Information Society and Public Libraries**

There have recently been various initiatives in the country that are relevant to the Global Libraries - Bulgaria Program.

#### *E-government and public e-services*

The process of introduction of e-government in Bulgaria began in 2002 when the Strategy for Modernization of the State Administration and Strategy for E-government were adopted. In the period from 2003 to 2005, some e-services for citizens and businesses recommended by the European Commission were introduced. Since 2005, business processes in the public administration have been re-engineered and e-services for citizens and companies have been introduced to a large extent. For instance, the website of the National Revenue Agency enables citizens to check their social and health insurance status online, employers to register labor contracts of their personnel, legal entities to file VAT declarations and citizens to file personal income statements, legal and natural persons to file customs declarations; in addition, the website provides access to social and health insurance legal documents. Furthermore, the website of the Ministry of Economy and Energy provides a public procurement electronic register, while the website of the National Library enables the search of publications in its online catalog.

E-services are not yet that popular in Bulgaria. The Global Libraries Initiative will enable a larger number of citizens and companies across the country and particularly in remote areas without public services, to use the above-referred e-services via public libraries and the assistance of library workers as needed.

#### *Introduction of ICT in Bulgarian schools (2005-2008)*

This is a joint initiative of the State Agency for Information Technologies and Communication – SAITC (high speed Internet connectivity for schools) and the Ministry of Education and Science (educational portal, distance learning platforms and educational content). The initiative reports large scale and positive results achieved (it is present in all 264 municipalities in the country, 35,000 computers in 2,200 schools are connected to the Internet, school staff is trained in all schools) but is not perceived as efficient by the public.

Often, school children cannot use the school computer labs after school when needed for self-study. The Global Libraries program will therefore enable school children to use computers and the Internet in a more flexible way and/or for a longer period of time, as needed.

#### *Telecenters - access to computers and Internet for all*

This project of SAITC established a more or less evenly spread countrywide network of 115 telecenters – in all types of settlements (towns and villages). Currently, the telecenters provide paid access to the Internet, e-government services and ICT training. At present, the telecenters provide basic ad-hoc paid assistance to walk-in users, as well as formal and organised training sessions according to long-term established curricula. An independent mid-term evaluation of the initiative in 2007 revealed that efforts should shift from a strictly technological approach to local development and to meeting the needs of each specific community. In addition, the

---

evaluators recommended assessments of needs to be conducted prior to investing in technology and in telecenters set-up in each community, as well as social marketing activities. Furthermore, ongoing internal evaluation of project activities was recommended, as well.

The Telecenters project has developed considerable local human capacity – ICT specialists. In addition, the IT training delivered by the telecenters follows Microsoft's Unlimited Potential curriculum. The IT specialists and the IT training experience of the telecenters will be utilized under the Global Libraries program by involving telecenters IT specialists in the local IT support staff and IT trainers. Already during the planning phase in 2008, telecenters IT specialists participated in the library needs assessment.

The following are projects and initiatives of BLIA:

#### *National Library Week*

This is the annual advocacy campaign of the BLIA which started in 2006, with support from the U.S embassy in Sofia to raise awareness about the role of public libraries in information society. In 2008, the campaign focused on the need of a Library Act.

The National Library Week will be used in the framework of Global Libraries Program for the purposes of advocacy and promotion of the services that state-of-the-art libraries can offer to society in the communities.

#### *Public Libraries Management*

This project (September 2008 – March 2009) is funded by the British Council and supports trainings and internships for 30 managers of chitalishte and municipal libraries in the UK. The managers will be trained as trainers for another 150 library managers. Emphasis is placed on the organization of information resources for facilitating life-long learning, e-government services, educational and business opportunities.

The Global Libraries Bulgaria Program will identify a part of its pool of trainers from the 150 library managers trained under the above-referred project.

#### *Legislative framework for libraries and library information activities in Bulgaria*

This initiative is supported by the British Council and its partners are BLIA, the Ministry of Culture and the National Library. The product is a Draft Library Act which stipulates the functions of the national, district, municipal and chitalishte libraries, sources of financing, and professional requirements for library staff. At present, the draft is being reviewed at the Ministry of Culture prior to submission to Parliament.

The professional library community in Bulgaria is tightly united around the idea of contemporary library legislation which would ensure state provision of library services, regular budgets and continuing education for librarians. The issue of the long awaited library legislation relates to the Global Libraries – Bulgaria Program, in so far it is expected that the Program's best practices and success stories will contribute to a new image of Bulgaria's public libraries among law makers.

#### *The library brings Europe closer to me*

---

Public libraries from three districts were trained in February – May 2008 to provide current information on the EU (citizen rights; mobility and education in the EU; EU funding windows<sup>10</sup>). The project was financed by the European Commission.

The training component of the Global Libraries Bulgaria Program will also include topics and training materials from this project.

#### *American-Bulgarian Library Exchange (the ABLE project)*

Funded by the US Department of State in the period 2003-2007, this project supported partnerships between 18 Bulgarian and 18 American public libraries, as well as trainings and internships in Colorado and Iowa. The project established 18 Bulgarian public libraries as community information centers and raised awareness among the central and local governments about the role of libraries in a democratic society.

The project results indicate that chitalishte libraries strongly benefit from IT equipment and training support and the effect is appreciated by their communities. Chitalishte libraries reported 25% growth in visits and from 10% to 50% increase in the number of circulated materials. It is evident that effective advocacy and district media coverage of the achieved results contribute to influencing the local authorities in a positive way (opening of new librarian posts, cash donations to purchase equipment for the library, etc.). The project's successful practices also prove that the peer-to-peer training-of-trainers model is applicable to the library community in Bulgaria in general. The project's pilot activities induced three chitalishte boards and six district libraries to ensuring free access to the Internet for the public. The Global Libraries Program will apply this approach, as well. The pilot ABLE libraries will also serve as a model for the program, as they already offer local e-content and their staff members have been capacitated to act as trainers for the new program.

The ABLE project proved that trained libraries show an interest in developing customized programs (e.g. activities for children during the holiday period, health-related activities). This approach contributes to an expanded population reach of the libraries, an improved public image of the library and higher support from the local authorities.

#### *Access to electronic information for persons with disabilities*

Supported by the British Council from June 2005 to May 2006, this project helped develop a website and install equipment at 11 public libraries for people with disabilities. Library staff was trained to operate the equipment.

During the implementation of the Global Libraries Bulgaria program efforts will be made to upscale its scope and content via additional funds from national and/or other sources so as to reach specific vulnerable groups in the community.

### **1.3. Program Goals**

#### **1.3.1. Program Parameters**

This country grant application envisages a 4.5-year program with national coverage in Bulgaria. A total program budget of USD 50 million is proposed, including USD 15 million subsidy from the

---

<sup>10</sup> These funding windows are the so-called Operational Programs or National Programs that are funded by the EU budget and co-funded by the national budget in the period 2007 – 2013 to support Bulgaria's cohesion with the EU. For instance, the Operational Program for Regional Development or the National Rural Development Program.

---

BMGF, USD 6 million of software donation from Microsoft and USD 29 million of cost-sharing resources from national (central and local government) funding. The program aims to facilitate 5,400 new computer workstations providing free access to the Internet to the general population at 900 public libraries. The program's training, advocacy and content development activities are expected to reach an additional 700+ libraries.

Based on the above parameters, the expected population reach under the program has been calculated in the following way: 5,400 workstations x 8 hours per day x 250 working days per year = 10,800,000 man/hours of workstation use. Assuming that one user employs an average of 50 hours of his/her time per year at the library, the program's population reach per year would be 216,000 people. Thus, the total population reach at the end of the country grant deployment would be 972,000 people.

### 1.3.2. Vision of Success

Bulgarians want to see their library as an attractive access point for people of all ages and social groups, regardless of whether in towns or villages. The 'dream' library brings together, offers, develops and disseminates information, communication tools, knowledge, skills and a wide range of services. It is a meeting space of high emotional and intellectual value for the community. In isolated and/or small settlements, the chitalishte and its library are the only points of public access to information.

Within five years from its start, the program will have enabled Bulgarian citizens to benefit from global web resources through at least three public libraries in each of Bulgaria's 264 municipalities. The program will support libraries to evolve as vibrant local hubs of information, communication, training, knowledge, cultural and community life. These libraries will form a functioning network that will help Bulgarians integrate into the global information society and utilize its benefits. It is expected that public libraries in Bulgaria will service an increasing proportion of the overall population.

The program will strive to include both 900 libraries which will receive ICT equipment, as well as another 700+ libraries which will not receive equipment but will participate in the program's other components - training, advocacy and networking. This approach will lead to the emergence of a dense countrywide infrastructure for multiplication of successful pilot practices on access to electronic information and services through public libraries. By advocating and communicating pro-actively the goals and results achieved, the program will attract long-term ownership of the authorities and wide public support for the activities initiated with the help of the Bill and Melinda Gates Foundation.

The program will contribute to transforming Bulgaria's public libraries into modern information centers and information access points that are valued by the host communities and are for that reason supported by the local authorities, the chitalishte boards and the private sector in the long run. The "new library" will provide for free a package of services:

- workstations for users;
- access to the Internet / online information;
- e-content;
- user training in computer and information literacy;
- design and implementation of community development projects;
- hosting of community initiatives and social activities / events;
- attendance to users tailored to specific needs (e.g. children, unemployed, business);

- 
- friendlier and more welcoming premises for users;
  - user oriented attitude of librarians.

While guided by the objective to expand the population reach of public libraries, the program in Bulgaria will also rest on the human development approach, applying the principles of inclusion, equal opportunities and solidarity when selecting target venues. This means that the program will seek to reach towns of high population numbers and settlements of smaller population size, where target library users will be either residents or coming from the neighboring area.

The program will have a long-term impact beyond the grant period. It will unite public library workers in Bulgaria into a better qualified and high-profile community through training staff and managers from the highest possible number of libraries. The program will also help translate into practice the national policy on e-government and e-services. The program will encourage a cooperation between public libraries and the formal education system, so as to boost the reliability of primary and secondary school education.

The program is unique both in terms of its scope and its variety of inter-related elements – it will deliver ICT equipment to public libraries, provide massive training for library workers and help develop multi-faceted e-content at the central, district and local levels.

The program will expand the opportunities of Bulgarian citizens to increase their skills and information and to make better choices about their well-being, livelihoods and the development of their settlements.

### **1.3.3. Paving the Way for Achieving the Vision**

A first assumption underlying the above vision of success is that the key program partners will continue their smooth cooperation, as initiated during the planning phase and will attract other strategic allies to the program. In addition, the program's efforts will strive to ensure local buy-in of the applied approaches, resources and tools in bringing ICT closer to the general population through public libraries. The program will aim to guarantee bottom-up and participatory design of the specific program interventions, such as pilot e-content generation, innovative services to users, new types of local partnerships facilitated/led by the library.

Another important aspect that the program needs to address is the professionalism, public image, self-esteem, motivation and involvement of the community of librarians. Further, the program team will make a concerted effort to unite the program's target libraries in an active network of collaborating and resource-sharing units.

Target libraries will be supported by the program in their outreach activities, so as to expand and diversify library users and partners. It is hoped that the results from the program will contribute to the efforts of the Ministry of Culture and the individual libraries in enriching library print and online collections.

Last but not least, the program envisages to spearhead and to support local libraries' partnerships with the private and third sectors, to help break the vicious circle of "poor funding – less users – less impact – a resource deadlock" that has been patent over the last 20 years.

Each and every of the program elements – ICT infrastructure, training, methodological support for enhanced service delivery, e-content generation – will be implemented with a view to

---

sustainability and building on results in the long run, especially in the post-grant period. This is why the program management and partners will conduct a careful analysis of the options for a post-grant institutional set-up that will preserve the experience, knowledge, approaches, and successful practices, tangible and intangible assets produced by the program. In the framework of a sustainability strategy, the program partners will outline the concrete steps, including funding commitments that will need to be taken, starting already during the implementation phase.

#### **1.3.4. Strategic Goal**

The strategic goal of the program was formulated during the preparation of Bulgaria's planning grant proposal to the Foundation through consultation among the project partners, as follows:

To provide easy and equitable access to information, knowledge, communications and electronic services in public libraries via free use of the Internet and other information and communication technologies, so as to enable Bulgarian citizens integrate in the global information society, improve their quality of life and enhance civil society development.

#### **1.3.5. Expected Impact of the Program on Target Population and Communities**

The local communities will be assisted to achieve the desired vision for their library. As pointed out at the citizen consultation forums conducted during the planning phase (August 2008), public libraries are perceived or wished to be “emotional and intellectual centers” and “places for communication among people with shared interests in reading and personal development”. People expect the library to transform from “a store of books” to “a physical and virtual space for interpreting information, exchanging views and debating opinions”. Initiatives at the local library can bring together different community groups, fostering new useful partnerships and bringing change. Thus libraries will grow as centers for civic participation where community members shape together their values and where everyone feels welcome, needed and respected.

The program is expected to raise the professional self-esteem of Bulgaria's library workers and their image in society – it will enhance their ICT skills, thereby also enabling the efficient use of ICT by library users. This will help both groups locate and use more and better information and services. Directly, the program will contribute to the development of ICT skills among the general population, as librarians will act – formally or informally – as tutors for their visitors.

Local communities will be able to overcome geographic barriers and digital divide in two ways. On the one hand, people from rural areas will be able to use all benefits of the information society such as free access to information on employment, educational and health care opportunities via the Internet, e-government services. On the other hand, local communities will be able to present on the web their local identity, culture, traditions and natural resources, as the program will help them through generating local content.

The increasingly closer integration of information, computerization and communications within a global network call for redefining the functions of public libraries in Bulgaria. Opening up to

---

the needs of consumers, as well as implementing ICT, will extend the scope of services offered by public libraries in the country, and will help overcome information inequalities. Public libraries are an important element of the national information system, and the prompt introduction of ICT therein will transform them into local community information centers and information society access points in Bulgaria.

The program is expected to complement the government's efforts to boost rural areas development in the context of Bulgaria's EU membership. The National Rural Development Program for 2007-2013 envisages investments in the infrastructure and economic fabric in order to improve living conditions in rural areas and make them more attractive to citizens. It is believed that the Global Libraries Bulgaria Program will contribute to and help diversify this effort, building on the planned investment in public and private infrastructure.

The program partners believe that the development of information society in Bulgaria through the public libraries network will significantly contribute to effective access of the population to the diversity of information, knowledge and services they need, regardless of their social status, gender, age, ethnicity, or health status. In the context of EU membership, the Bulgarian Government treats the development of information society as a cross-cutting policy intervention integrated into the country's sectoral plans and development programs.

---

## 2. Program Objectives, Venue and Population

### 2.1. Program Objectives, Outcomes, Outputs and Activities

#### 2.1.1. Program Objectives

The rationale applied in formulating the program objectives is outlined below. In the program's strategic goal, equitable access is the foundation, while the four key elements are:

- Information
- Knowledge
- Communications
- Electronic services.

The means to address these four elements through the program are the use of free Internet and other ICT, while the ultimate goal is to help integrate Bulgarian citizens into the global information community, improve their quality of life and enhance the development of civil society.

As the program is targeted exclusively at libraries, the formulation of its objectives rests on the vision for an enhanced public function of libraries in the future. The underlying notion is that the program shall enable Bulgaria's public libraries to serve effectively their beneficiaries. Therefore, the proposed program objectives imply three new roles of libraries which complement one another. These roles derive both from the traditional function of libraries in Bulgaria, as well as from the changing needs of current and prospective library users.

Consequently, the program's target libraries shall establish themselves as centers for:

- **stimulation of community development** by transforming the library into an attractive space for public life, equitable participation and access to information;
- **enhancement of the quality of human capital** by developing the skills of library workers and providing education and training opportunities to library users;
- **accelerated integration into the information society** by promoting information literacy in the library communities, providing communication tools and offering e-services and resources, and by increasing the potential of Bulgaria's public libraries network as a whole.

The above three objectives are oriented towards achievement of the strategic goal, as formulated by the program partners at the very outset of the program design process.

#### 2.1.2. Key Considerations in Planning the Program Activities, Outputs, Outcomes

---

The program's Activities / Outputs / Outcomes table provided below contains four horizontal sections, corresponding to the respective program objectives, as follows:

*Objective 1 – program management*

In view of the Foundation requirements and the envisaged grant implementation mechanism, an objective addressing the relevant stages of the program cycle has been formulated in addition to the other three. This objective is “operational” and not “substantive”. Its achievement is a prerequisite for successful work under the three substantive objectives. The envisaged activities and outputs under Objective 1 cover the program implementation, management, monitoring, impact assessment, evaluation and post-grant sustainability aspects that need to be addressed during the 4.5 years of country grant deployment. All activities under Objective 1 will be a direct responsibility of the PMU and the program partners.

*Objective 2 – community development*

The underlying rationale in approaching Objective 2 is that most activities will be carried out by librarians and by local community actors themselves. Rather than direct hands-on involvement in each concrete case (which will be impossible for reasons of scope and budget), the PMU will guide, educate, consult and mentor the 28 District Coordinators in their work as facilitators, promoters and resource persons for activities under this objective in their respective administrative district.

Activities under this objective will assist librarians to diversify the services provided by the local library and will also raise the awareness of chitalishte boards about the potential and mandate of the library in their chitalishte. At the same time, the program will seek involvement of the private sector in the library activities along the lines of corporate social responsibility.

Historically, public libraries in Bulgaria have supported the work of local schools, as well as some municipal activities in the field of culture. The program shall encourage more varied and richer partnerships between the library and the local organizations and individuals. There is a need and potential for such partnerships both in the educational, the local service delivery and local e-content development fields. As volunteerism is a sporadic phenomenon in Bulgaria, the program will seek to experiment and stimulate giving to the community for the sake of overall local improvement. The program's advocacy and communications activities will promote an enhanced role of public libraries in the life of the community. The new library partners, friends and volunteers that the program shall bring together will also act as local advocates for the role of the library.

*Objective 3 – human capital*

As the quality of human capital shall be enhanced through the program mainly via training, all training activities – regardless of whether they will be a direct responsibility of the PMU or will just be assisted by the PMU – have been included under Objective 3.

As part of the program's capacity building component, librarians will be trained as information consultants able to manage a small public library and communicate effectively with all user groups. Librarians shall be able to use the whole spectrum of research tools and the resources of district libraries (for example, the “Ask the Librarian” electronic queries). Librarians will also be trained and prompted to consult each other through the program web portal, moderated by the PMU.

---

Library users will be assisted by the already trained library workers to benefit from ICT and the Internet. Thus, the skills and expertise gained by librarians through program's training component will be brought to the community.

In all types of librarian-user interaction (questions & answers; guided searches; librarian instructions or lessons in IT delivered by the librarian; information source evaluation) the trained library workers will be gradually building the information literacy skills of library users - their ability to find, assess and use information correctly, ethically and efficiently.

The development of training materials to be used during the program (printed and electronic) will have started already during the planning phase – in the first half of 2009. A training plan for librarians has already been prepared under the program. The objective of the training is to achieve a competency profile of Bulgarian librarians – professionals possessing IT literacy, e-research skills, library management skills and outreach abilities, in addition to the required librarian qualifications.

The program portal will be used for the purposes of training as well. In addition, librarians will be supported to develop local content addressing specific educational and/or training needs in their communities.

*Objective 4 – information society*

All program activities related to Internet access and ICT infrastructure have been included under Objective 4, as the existence of Internet and functioning ICT equipment in the target libraries is a sine qua non for integration into the global information world through the public libraries.

The program shall stimulate the cooperative efforts among librarians from different locations. For instance, by working in virtual teams via the Internet and the program portal, librarians could jointly produce user needs observation reports targeted at upgrading the services offered, or compose subject directories of free sources on community and other information.

See table below for details on the groups of activities, related outputs and desired outcomes under each of the four program objectives.

### 2.1.3. Activities, Outputs and Outcomes under Each Objective

<b>Vision of Success:</b>	Within five years from its start, the program will have enabled Bulgarian citizens to benefit from global web resources through at least three public libraries in each of Bulgaria’s 264 municipalities. The program will support libraries to evolve as vibrant local hubs of information, communication, training, knowledge, cultural and community life. These libraries will form a functioning network that will help Bulgarians integrate into the global information society and utilize its benefits. It is expected that public libraries in Bulgaria will service an increasing proportion of the overall population.	
<b>Project Objective 1:</b>	<b>Efficient and effective program management and development</b>	
<b>Activities</b>	<b>Outputs</b>	<b>Outcomes</b>
<ol style="list-style-type: none"> <li>1. Hire program management unit (PMU); organize PMU premises; hire key consultants</li> <li>2. Launch program – central and district levels</li> <li>3. Instruct District Coordinators</li> <li>4. Instruct regional IT support staff</li> <li>5. Select target libraries</li> <li>6. Needs assessment iterations (libraries, training, outreach, services)</li> <li>7. Sign and monitor agreements with local authorities (internet access, wiring, premises, furniture, security, utilities, long-term IT support)</li> <li>8. Carry out communication and advocacy activities (media partnerships, official launches of equipped libraries, dissemination of printed materials, etc.)</li> <li>9. Further develop and promote the use of the program portal, including for training</li> <li>10. Capacity development of the district libraries as program coordination/resource units</li> <li>11. Institutional capacity development for long-term program management</li> </ol>	<ol style="list-style-type: none"> <li>1. An operational framework ensuring effective country grant implementation is in place</li> <li>2. Improved program implementation based on monitoring and evaluation</li> <li>3. Institutional capacity ensuring post-grant development and sustainability of results is in place</li> </ol>	The achievement of this objective will ensure that the desired outcomes under the other three objectives are attained.

12. Carry out impact assessment		
13. Program monitoring and evaluation		
<b>Project Objective 2:</b>	<b>Stimulation of community development</b>	
<b>Activities</b>	<b>Outputs</b>	<b>Outcomes</b>
<ol style="list-style-type: none"> <li>1. Support librarians to organize community programs and events</li> <li>2. Support librarians to deliver library ICT services for vulnerable groups</li> <li>3. Support meetings of the chitalishte boards and/or local stakeholders focused on the library</li> <li>4. Involve local business in public private partnerships for the benefit of libraries</li> <li>5. Encourage new partnerships of the libraries with local institutions and individuals (including volunteers)</li> <li>6. Exchange of good practices between libraries / chitalishte</li> <li>7. Support stakeholders in library promotion at the local level</li> </ol>	<ol style="list-style-type: none"> <li>1. Community programs and events organized by the libraries using ICT</li> <li>2. Campaigns/programmes/activities run by the library for vulnerable groups using ICT</li> <li>3. Chitalishte boards and local stakeholders involved in the planning and implementation of library activities</li> <li>4. New partnerships of community value in place</li> </ol>	<ol style="list-style-type: none"> <li>1. The library is a space for local community life and equitable community development</li> <li>2. Libraries regain public trust as important community and information centers</li> <li>3. Volunteers contribute to library activities – the value of giving to the community is promoted</li> <li>4. Library partners develop appreciation for library services and act as library advocates</li> </ol>
<b>Project Objective 3:</b>	<b>Enhancement of the quality of human capital</b>	
<b>Activities</b>	<b>Outputs</b>	<b>Outcomes</b>
<ol style="list-style-type: none"> <li>1. Select training providers</li> <li>2. Conduct training of trainers</li> <li>3. Develop training materials, incl. portal modules</li> <li>4. Train library workers to use ICT and electronic information resources in their work and to teach members of the community in ICT</li> <li>5. Conduct a comprehensive capacity development program for library workers</li> <li>6. Train people from the community in ICT</li> <li>7. Support librarians to develop local content and services as per specific educational training and</li> </ol>	<ol style="list-style-type: none"> <li>1. Library workers trained in ICT, e-information resources, advocacy, fundraising, service delivery and project cycle management</li> <li>2. Growing number of people trained / consulted to use ICT and electronic information resources</li> <li>3. A range of specific services and resources in place to support the</li> </ol>	<ol style="list-style-type: none"> <li>1. Increased competence and confidence of library workers and users to develop themselves</li> <li>2. Members of the community are able to use ICT independently to meet their needs</li> <li>3. Members of the community have enhanced opportunities</li> </ol>

<p>personal needs</p> <p>8. Facilitate and broker partnerships between libraries and other educational / academia bodies</p> <p>9. Contribute to modernizing library schools curricula based on the accumulated experience from the program</p>	<p>education, training and development of library users</p> <p>4. Improved collaboration between libraries and institutions offering educational and training services (schools, vocational training centers, academic and research bodies)</p>	<p>for education and training in libraries</p> <p>4. Libraries are more responsive to the education and training needs of their communities</p>
<p><b>Project Objective 4: Accelerated integration into the information society</b></p>		
<p><b>Activities</b></p>	<p><b>Outputs</b></p>	<p><b>Outcomes</b></p>
<p>1. Verify internet access at target library sites</p> <p>2. Verify library internal e-infrastructure</p> <p>3. Procure ICT equipment</p> <p>4. Install ICT equipment</p> <p>5. Provide IT support to libraries</p> <p>6. Negotiate donation of software – Microsoft</p> <p>7. Support libraries to promote themselves as ICT centers and thus attract more visitors</p> <p>8. Library workers help users to communicate through internet</p> <p>9. Library workers help users to use various electronic information tools</p> <p>10. Library workers act as local content facilitators</p> <p>11. Library workers act as brokers for increased spread of e-services</p> <p>12. Library workers participate in joint program events</p> <p>13. Library workers share professional information and cooperate in service delivery to users</p>	<p>1. ICT infrastructure (workstations, periphery and internet) operational in target libraries</p> <p>2. Library users trained and able to communicate beyond their communities using ICT</p> <p>3. Higher spread of electronic information tools and services (e-government, library catalogs, on-line databases, search engines, commercial portals, e-banking, blogs, self-presentation)</p> <p>4. Joined information products/tools designed/maintained by librarians</p>	<p>1. Information literacy promoted in the communities</p> <p>2. People overcome communication gaps arising from physical distances</p> <p>3. Improved solutions to individual and community issues, including decision-making achieved through ICT</p> <p>4. A new culture of information sharing and virtual team working among librarians introduced</p> <p>5. Increased potential of Bulgaria’s public libraries network to service the citizens</p>

## 2.2. Target Population and Venue Selection

### 2.2.1. Target Population

The population reach aspect of the program cannot be the only factor for selecting target venues, as Bulgarians who are deprived of access to information and ICT generally reside in settlements below 5,000 inhabitants (forming a substantial percentage of the country's total population). As shown in the chart below<sup>11</sup>, only 7% of this population uses the Internet.

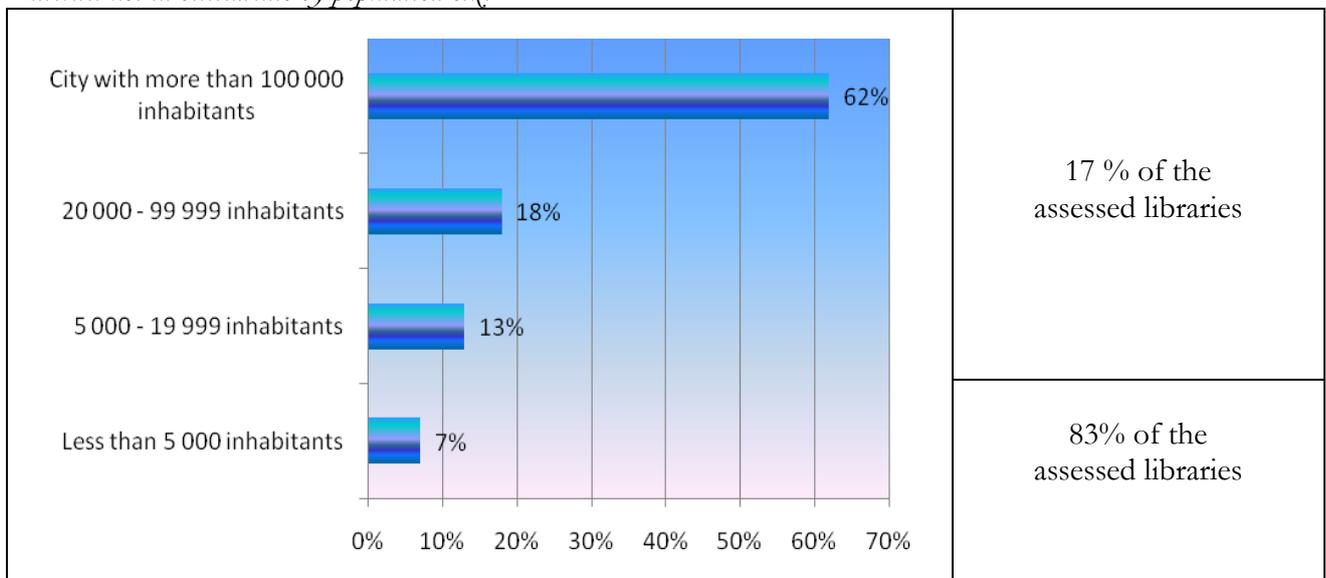
Lessons learnt from previous initiatives involving public libraries in Bulgaria (e.g. the ABLE project), as well as the citizen consultation forums conducted by the project team during the planning phase, point to the fact that library users and communities in smaller settlements derive the highest benefit from program interventions. The largest societal benefits from the program are expected to occur in smaller settlements.

According to the conducted needs assessment, 83% of the assessed public libraries are located in **towns** or **villages** with less than 5,000 inhabitants, which are however predominantly located in **municipalities**<sup>12</sup> with population size above 5,000. This means that the potential population reach of most target libraries will range beyond the number of 5,000. When selecting the program's target libraries in small settlements, the existence of transportation infrastructure enabling residents of neighboring settlements to visit the library will be a prerequisite.

The program will pursue a balanced spread across the national territory, so target libraries will be located both in settlements with high concentration of population (above 5,000) and in settlements below 5,000 inhabitants.

The library needs assessment reveals that 17% of the libraries are located in settlements with more than 5,000 inhabitants. As per the chart below, the percentage of Internet users in such settlements increases with population size but is still not satisfactory.

*Internet use in settlements by population size*



*Source: Gemius Bulgaria LTD, July 2008*

*Source: Planning Phase  
Library Needs Assessment*

<sup>11</sup> Study conducted by Gemius Bulgaria Ltd. in July 2008.

<sup>12</sup> Please note that a municipality includes various settlements (towns and villages).

---

Public libraries in settlements with population above 5,000 inhabitants are district, municipal or chitalishte libraries that have in principle reached certain degree of modernization compared to libraries in smaller settlements (chitalishte libraries). The former will be supported by the program not just as free providers of Internet and other e-services, but also as training, coordination and resource centers for the smaller and less developed chitalishte libraries.

### **2.2.2. Program Beneficiaries**

The modern way of life requires the use of ICT, which entails that the public is sufficiently computer and information literate. The use of ICT in public libraries and the targeted training during the program will help citizens attain the needed literacy levels. The program will benefit current and potential library users who do not have access to computers and the Internet at home, at school, or at work, or who are not using ICT effectively. At present, library users are predominantly school children and students, retired people to a less extent, whereas working people seldom go to the library.

The consultation forums and focus groups conducted with representatives of these four groups during the planning phase (August 2008) concluded that their access to print and online resources is scanty. Respondents stated they need expanded access to information through public access to computers, extended opening hours of the library, provision of online resources, and training.

#### *Target libraries*

Public libraries in Bulgaria are a driving force for education, culture and information. In many cases, they are the only local information centers offering knowledge and services to the community. The participation of public libraries in the program would have a positive impact on the information process in two ways. On the one hand, the program will support the modernization of libraries as attractive points for public access to information. On the other hand, the public will have better opportunities to overcome information inequality by using the Internet and other computer library services.

#### *Library staff*

Librarians in Bulgaria have historically enjoyed extensive public trust in their capacity of benevolent attendants to the need for knowledge and information. This public trust is a solid basis for further building the skills of librarians to work with various global and local sources of information. In addition, this public trust will be helpful to librarians in their work with an ever more diverse and demanding audience. The program will address the necessity for additional skills needed by librarians by offering a successful training model in service of society. Thus, the training activities under the program would represent an essential and sustainable investment in Bulgaria's future.

Users of library services, especially beginners, will rely on the support of library staff and on the training opportunities, which the program would offer in computer and Internet use, and in modern communication technologies.

#### *Citizens*

---

As established during the stakeholder consultation forums, the network of public libraries shall become a means for public communication. People expect public libraries to encourage citizen participation in local governance and to support social cohesion in the communities. On the one hand, modernized libraries will enable the bilateral transfer of information and documents between citizens and service-providing institutions, and will also facilitate a faster and more efficient contact with the central and local authorities. On the other hand, the more intensive use of the Internet will enhance interactions within the community. Computerized and Internet-connected libraries will offer not only access to the entry points of public administration bodies, but will also enable the interaction of citizens with various non-governmental organizations and interest groups. People will be able to be better informed, to express opinion and to defend their interests in the development of their municipality.

The program is expected to strengthen 900 public libraries as information centers. The enhanced access to Internet resources will boost the general degree of information of the Bulgarian public and will expose it to the world. By using public libraries, Bulgarian citizens will connect to the global cultural and information diversity in a more efficient and user-friendly manner. In addition, Bulgarian citizens will be able to use modern education and communication tools. Public libraries are particularly important in smaller settlements (small towns, villages) as they are often times the only general information provider there.

A specific sector where public libraries support both the acquisition of knowledge and the sense of familial identity and community spirit is the knowledge on regional natural and cultural heritage. Through their unique tradition in the accumulation and conservation of archives, publications, geographic maps, photos, etc. public libraries have long been the custodians of local cultural and historical heritage. They possess exceptional collections in print. As corroborated through focus group discussions, new technologies will enable the digitalization of these valuable documents, thereby making them more accessible, including to Bulgarian ex-pat communities abroad. The conversion and availability of printed and other materials in digital format will guarantee the conservation of the originals.

Bulgaria has an extremely rich and diverse history and folklore, in whose conservation and dissemination public libraries can play an even more important role. This role of the local library was enthusiastically referred to during the citizen consultation forums, conducted as part of the program's impact planning and assessment process in July 2008. The participants in the forums intuitively highlighted the need for Bulgaria's public libraries to outgrow the old closed pattern and to transition to a new – open and communicative – model of interaction with their communities.

The program could contribute to developing new activity lines and new services for public libraries, such as the specialization of certain libraries to provide training for socially disadvantaged groups, or as access points for administrative services for the elderly and the disabled, or as centers for social inclusion of ethnic minorities. Such developments would expand the capacities of public libraries in the long-run to mobilize additional sources of funding and unconventional partnerships.

#### *Library users in small and remote settlements*

With respect to libraries in small and remote settlements, Internet access will be a new asset, which will have not only informational, but also a social impact. Modernized public libraries will be among the landmarks for better quality of life in rural regions, which account for 81% of the

---

territory of Bulgaria and are home to 42% of the population. Keeping young people in rural regions is a national policy in Bulgaria as an EU Member State - consistent measures are being taken through the National Rural Development Program for 2007-2013. Since 65% of public library users are children and young people, modernized chitalishte libraries could play a role in this respect.

#### *Micro enterprises*

During the stakeholder consultations (July 2008), the local communities expressed their need to access legal and sector-specific information of relevance to micro business operations. Micro enterprises (up to 9 employees) present the highest percentage share in Bulgaria's private sector (above 90 %) <sup>13</sup>. At present, district libraries provide - to a higher or lesser extent - the following services: data and information about local industries; legal and regulatory references; sources of sectoral / technical knowledge. The provision of this information is in either printed form (periodicals, special publications), or in electronic form (legal databases, business directories, other online tools).

The Global Libraries Bulgaria program can be of use to micro and small entrepreneurs by enabling guided Internet access by users at target libraries to the sites of district libraries and by encouraging a more intense resource sharing among librarians from different locations further to user queries. The target libraries staff will receive training in how to meet user needs for business information, including instructions on how to find and use information independently at the free public library. It is hoped that this will help entrepreneurs to rely on self-help rather than immediately recurring to the unaffordable or unavailable locally paid services of consultants.

#### *Students and life-long learners*

Libraries have always been a place and source of education, and will thus play an increasingly important role in the acquisition and improvement of professional skills. People will be able to participate in employment programs, as libraries will offer them resources for self-education and access to specialized expertise. Libraries will be in a position to offer information on training courses and job vacancies.

Traditionally, libraries in Bulgaria complement the education system by making available their facilities and resources to people of all ages to participate in life-long training and self-education. When libraries are provided with computers for public access to the Internet, they will be able to complement the efforts of the school system through after-class activities, especially because school libraries are not always well functioning and computer labs are not available for free usage by the children.

#### *Children and parents*

Public libraries are a safe place for children of working parents, who cannot always ensure adequate adult oversight. The children departments of target libraries that are equipped with computer workstations will offer an alternative to the Internet cafés where youngsters are exposed to unfiltered information and/or unhealthy environment, such as smoking and alcohol. Some initiatives have already been successfully launched and actively supported by the local authorities at several district libraries (e.g. project of the Shumen District Library: "Let's save

---

<sup>13</sup> Annual report on the state and development of small and medium enterprises, data for 2006, Ministry of Economy and Energy of the Republic of Bulgaria.

---

children from the streets”). By supporting target libraries with equipment and training, and by promoting good practices through the web portal, the program will encourage a vast multiplication of this kind of work of libraries with children.

#### *Ethnic groups*

Only 5% of the ethnic Roma and 7% of the ethnic Turkish population used Internet in 2005 (E-Bulgaria Report, 2006). These minorities predominantly live in settlements with less than 5,000 inhabitants where the average number of Internet users is 7% (as shown in the chart above). This means that ethnic minorities in general are isolated from mainstream information channels. The special outreach activities that will be supported through the program will specifically target prospective library users among the ethnic minorities. Librarians will be trained and encouraged to formulate project proposals to the existing EU funding windows for 2007 – 2013 addressing the needs of ethnic minorities.

#### *New library users*

The program aims to expand access to ICT beyond current library users. Many citizens do not recognize libraries as places for free information and communication. By transforming libraries into information centers, responsive to user needs, the program is expected to also attract unemployed people, house wives and other users (e.g. micro entrepreneurs) who might need library services.

### **2.2.3. Achieving Scale**

#### *Multiplication effect*

The program will aim to encompass all 264 municipalities in the country, starting with at least one library per municipality. The achievements of the first target libraries will be promoted in the region, pursuing a multiplication effect. This expectation is based on the assumption that good practices in Bulgaria are easily disseminated and quickly multiplied. For instance, “chain development” was already observed in Bulgaria with the ABLE project libraries which started offering online community information and were followed by non-participating libraries. Also, the same phenomenon was observed in the framework of the UNDP/Ministry of Culture Chitalishte Project, where chitalishte that were not receiving direct subsidies from the project made ‘creative borrowing’ of positive practices implemented by chitalishte that were getting project grants.

The program’s advocacy component will include regular events (workshops or travelling seminars) across the national territory aimed at dissemination of good practices. At these events successful libraries will showcase their achievements and will share lessons learned with peer libraries and authorities.

#### *Extending library opening hours*

Target libraries will be encouraged to make available longer or flexible opening hours to their communities in order to accommodate the specific needs of their visitors. At present, 88% of the assessed public libraries are served by one staff member. In 57% of the cases, this staff member serves as chitalishte secretary at the same time, which means that the library is open less than 8

---

hours per day. As the Ministry of Culture will facilitate funding for one full-time librarian position at each target library (government cost-sharing for the program), target libraries will be able to offer longer and/or more flexible working hours than at present. Sensitization work will be carried out vis-à-vis the chitalishte boards for introduction of flexible opening hours.

### *Piloting and encouraging volunteerism*

Volunteerism is a powerful means of engaging people in community development. Regrettably, the contemporary Bulgarian society underestimates the potential of voluntary work and does not nurture a values system, or a legislative base, that promote it. There are lack of knowledge, skills and good practices in volunteerism nationwide. Volunteerism in today's Bulgaria happens only sporadically and on a very limited scale.

The 18 Bulgarian libraries that were trained through the ABLE project at public libraries in Iowa and Colorado attracted volunteers in a variety of library activities. For instance, a mother with an autistic child helps the librarian while her child spends half a day in the library's section for children, feeling better and developing communication skills in a conducive environment. Or, puppet show actors teach children in the library how to perform such shows. Or, an artist gives free drawing classes at the library (Rodina Library, city of Stara Zagora). Or, Bulgarian English speaking volunteers together with native speakers conduct conversational English classes for adults at the Sofia City Library. Or, friends of library club members from high schools teach younger children at the library how to work with computers. This means that it will be feasible to promote volunteerism through the program.

The program will strive to pilot and disseminate models for voluntary work at or for public libraries. High-school students and active pensioners will be a target group in this respect. The PMU and the District Coordinators will guide librarians in attracting and motivating prospective volunteers – assigning clear, tangible and publicly visible tasks on the one hand, and eliciting public gratitude and recognition on the other. The mutual benefit and the non-material reward mechanisms will be relied upon. It is envisaged that the PMU will guide the piloting of volunteer activities in 20 municipalities from different regions of the country. The capacity building program for librarians will include modules on volunteerism. The program's communications and advocacy plan will foresee concrete steps to explain and promote the results.

### *Networking*

It is expected that the program will boost the interaction among the individual public libraries. With the introduction of ICT, libraries will share more resources, as well as bigger and varied professional information. The program team will stimulate such networking through the program's web portal, e.g. facilitating email discussion groups on servicing library users. Librarians will be trained to gain knowledge and access to resources through networking in order to better service library users, e.g. in answering difficult queries or referring queries to libraries with richer resources. In this way, networking is expected to boost the quality of library service provision and lead to a rise in library visitors. Networking among librarians is also expected to contribute to better management of individual libraries, as librarians will pose questions or issues for discussion among their peers.

### *Promotion of the new services in the community*

---

Local media, library users, supporters and partners will be encouraged by the program team to demonstrate and illustrate the value of the technologically and professionally equipped library to the personal development needs of citizens.

For instance, user feedback will be encouraged by sharing of success stories at local events (such as village fairs) and by involving schoolchildren in essay competitions - writing on the topic of “How did the library changed my life?”, or “My library”. Librarians will be trained to interact with the local/regional media, including for sharing of the success stories and for informing about the outcomes of the essay competitions. News boards on the library activities may be maintained by the librarians at points of intense public circulation – local shops, the mayor’s office, the school.

#### **2.2.4. Venue Selection – Geographic Distribution and Number of Target Libraries**

*Why targeting the highest possible number of public libraries?*

The analysis of the conducted needs assessment of 2,351 public libraries points to a community of 1,676 of them that would be eligible to participate in the program. In consultation with the program partners, the experts applied the principle of including in the initial draft list all those libraries that have a potential to provide public access to computers and information.

This principle of inclusion of as much public libraries as possible into the program is based on the rationale that the chitalishte and its library are needed as the most natural, or even single, access point to information by at least half of Bulgaria’s population.

The countrywide network of public libraries was built in the 1970s by the state as the most down-to-earth, accessible, close-at-hand information resource for the general population. Historically, public libraries have supported the education system, life-long learning, access to information, quality of life and social inclusion of the population at large.

While information diversity has been on the rise globally, Bulgarian residents in smaller settlements (especially in villages) have remained deprived of the opportunity to access modern information sources, also due to the inability of public libraries to provide Internet access and state-of-the-art library services. The gap between development opportunities available in villages and bigger or more advanced, urban settlements keeps broadening. As corroborated by the conducted library outreach needs assessment, public libraries are perceived as the natural and key information access points for the neediest segments of the population. The objective to include the highest possible number of functioning libraries strives to channel development efforts to where they are needed most.

The chitalishte, which host 98% of Bulgaria’s public libraries, emerged as a genuine grass-root expression of the strive for knowledge of Bulgarians, and have since their first days in the middle of the 19<sup>th</sup> century embodied the heart of Bulgaria’s civil society. The word “chitalishte” itself means “a reading place”. It is unanimously accepted that the chitalishte – and their libraries – are and will always be deeply rooted in Bulgaria’s social life. The logic of the proposed program is to include as many chitalishte libraries as possible, in line with this national context.

*Why targeting mostly smaller settlements and how sustainability will be reached?*

---

The program in Bulgaria aims to address – in the first place – digital divide. While according to 2007 data, 33% of the population uses the Internet, this share in settlements of up to 5,000 people is just 7%, i.e. digital divide there is highest. Bulgarians use the Internet from home or from work but home computers are still an exception in smaller settlements and local employers have not yet introduced massive use of computers at the workplace. Computer workstations at the municipality are available for use by municipal employees only, and the use of computers in schools is only restricted to students. Thus, in practice the residents of small settlements remain isolated from e-government services.

The majority of public libraries in Bulgaria (83%) are located in settlements with up to 5,000 residents. In bigger settlements the opportunities to use ICT and the Internet are much wider, whereas in smaller settlements modernized libraries will be the single source of free public access to the Internet.

The program partners unanimously share the opinion that Internet-shared workstations in smaller settlements will be subject to a much more intense and value-adding use than in bigger settlements. In terms of post-grant sustainability, the link between citizens and local authorities is more direct in small settlements, which gives grounds to assume that there will be continued support to public libraries in these settlements, once the effects of the program become known. Experience under similar initiatives (the ABLE Project) showed that results and impact are much more tangible in the smaller chitalishte libraries than in libraries servicing big settlements.

Another reason to anticipate post-grant sustainability in smaller settlements is that the national policy for development of rural regions (81% of Bulgaria's territory) for 2007 - 2013 provides various funding windows to support the sustained financing of public libraries in the long-run. In addition, local-level advocacy happens more naturally and with higher visibility in smaller than in bigger settlements. The program team will support in a systematic way such efforts, and the National Association of Municipalities will be actively involved, as well.

#### *Why targeting a balanced geographical spread?*

Socio-economic disparities exist within each of Bulgaria's 28 administrative districts, along the lines urban-rural and center-periphery. This constitutes a major overall challenge for the country's equitable regional and local development. Consequently, the program partners agreed at a Project Board meeting in October 2008 that a balanced geographical distribution of target libraries across the national territory needs to be pursued. This balanced distribution is regarded as the leading principle in the venue selection for the Global Libraries Initiative in Bulgaria.

#### *Are target libraries well aligned with the national development policies?*

The program partners consider Global Libraries – Bulgaria not as a stand-alone intervention but as an effort which stems from the national priorities for the period 2007-2013 to boost the development of rural areas and foster a balanced regional development – two objectives within the cohesion policy of the European Union, of which Bulgaria is a member. The proposed program will be part of the national cause to support the development deprived and/or isolated communities in Bulgaria.

The inclusion of target libraries into the program will be effected in the context of investment opportunities offered by EU funding windows (so called “operational” or “national” programs) in Bulgaria. As a lead organization for the program, the Ministry of Culture will cooperate with

---

other ministries / agencies to facilitate access of the target communities (candidate libraries) to the available EU and national funding windows.

*Why is the program's list of target libraries dynamic?*

It is expected that the physical condition, services, human resources and Internet connectivity of each individual library assessed in 2008 will not remain static overtime until and if the respective library gets included into the program. As a staged approach to program roll-out is envisaged (libraries included in three separate batches in 2009, 2010 and 2011), there will be a gap of one to three years between the needs assessment time and the effective start of program activities at the library. Prior to Program Board approval of the lists of target libraries for 2009, 2010 and 2011, the program team, supported by the 28 District Coordinators, will verify the data stated in each needs assessment questionnaire against the actual status of the library.

In September 2008, the program team and core experts came up with a list of 1,676 currently eligible for the program public libraries in Bulgaria. This list has been used for planning purposes in the program design - library support packages and budget projections. It is expected that this list will differ from the actual list of libraries that the program will support due to the natural process of change in library conditions 2008-2011 (e.g. a library could have gone through repair of premises earlier than expected, or the chitalishte board could have decided to close down the library).

A budget ceiling of USD 15 million for the country grant was re-confirmed by the Foundation in November 2008. However, based on the rationale outlined above, the program partners firmly support the view that at least 1,600+ public libraries in Bulgaria are eligible for inclusion in the program. The program partners then agreed that a lower number (900) of target libraries should be directly and fully targeted by the country grant. The selection of these 900 target libraries out of the larger eligible community of 1,600+ will be subject to a careful review process during the implementation phase.

*How was the list of 1,676 currently eligible libraries composed?*

The composition of this list went through two stages in September – October 2008:

(1) eliminating from the 2,351 assessed libraries those not active or not having free space for computer workstations – the list was reduced to 2,110 public libraries;

(2) screening against the following minimum requirements: collection size of at least 2,000 volumes, library acquisitions for at least one of the years 2005, 2006, 2007 and at least 253 visits (one per each working day) for the year 2007 - this stage resulted in the afore-mentioned total of 1,676 libraries that have the potential to become information centers.

*Why gradual inclusion of the 900 target libraries in three batches?*

An analysis of the reported physical space and facilities of the assessed libraries showed that:

- 470 libraries reported no need for renovation of premises;
- 415 libraries reported premises renovation needs estimated under 2,000 BGN;
- 791 libraries reported premises renovation needs estimated above 2,000 BGN.

---

The above implies gradual inclusion also of the 900 target libraries into the program implementation. As the country grant phase is expected to start in June 2009, the second half of 2009 should be regarded as a "pilot" phase, bringing on board the program the first batch of libraries. The years 2010 and 2011 will be full-speed implementation, equipping with computer workstations and the needed periphery the entire community of selected target libraries.

*What are the mandatory requirements for participation of libraries in the program?*

The program partners agreed that the following are mandatory requirements for inclusion of any library in the target libraries list:

- A full-time librarian position exists or will be ensured through additional subsidy from the Ministry of Culture;
- Decision by the municipality to support the library's participation in the program by ensuring the following:
  - ready-to-use premises;
  - heating and air conditioning for the public access area in the library;
  - desks, chairs and other basic furniture for the specified number of computers;
  - coverage of Internet connectivity costs at a minimum bandwidth of 512 kb/s;
  - maintenance / help desk support for the ICT equipment after the end of 2011;
  - reasonable security measures, including insurance against natural disasters and robbery for the ICT equipment donated by the program.

This decision should also state the municipality's readiness to sign a memorandum of understanding for participation in the program with the chitalishte board, Ministry of Culture and UNDP.

- Alternatively to the above, availability of the above conditions ensured by the chitalishte;
- Letter of intent by the chitalishte board / municipal library management to participate in the program.

*How will target libraries be selected?*

Further to a decision of the Ministry of Culture and the other program partners, in each of the three years (2009, 2010, 2011) the program team will invite libraries from the list of currently eligible libraries to apply for participation in the program, in partnership with the municipality as necessary, by filing an application form and supporting documents, identifying the library's readiness to meet the mandatory requirements (see above) within the respective year.

The application forms will be submitted to the program's 28 District Coordinators<sup>14</sup>, who will verify whether the information in the forms corresponds to the actual status of the applying libraries and will subsequently transmit the forms to the PMU in Sofia. The PMU supported by external experts will review the application forms in advance of sessions of a working group, composed by representatives of the program partners and the relevant district coordinator. The working group will approve draft lists of target libraries by administrative district. The three PMU Field Coordinators<sup>15</sup> will visit libraries from the draft lists to perform on site verification of

---

<sup>14</sup> See Program Management Structure presented in Section 5.

<sup>15</sup> See Structure of the Program Management Unit presented in Section 5.

---

the applications and to initiate a working relationship with the local partners (chitalishte, municipal authorities). The draft lists will be submitted to the Program Board for final approval. The Program Board will apply the following:

*What are the considerations for composing the target libraries list?*

- Include the 27 district libraries in the first year of implementation because of their desired role as training, coordination and resource centers;
- Include at least one library per municipality (in addition to the district library, where relevant) in the first year of implementation;
- Libraries from Package 2<sup>16</sup> (that are expected to act as training bases) shall be given a priority;
- Avoid including two libraries from the same settlement in the first year of implementation;
- Analyze the current demographic trends and potential population reach of the library (assuming that the population served by the library may reside in neighboring areas);
- Library performance indicators (number of visitors, circulated materials, acquisitions);
- Number of public activities/initiatives of the library in the last two years;
- Letters of support from the local community;
- Letter of intent from the chitalishte board on participating in the program long-term.

### **2.3. Overall Program Scope**

Based on the results from the needs assessment of public libraries in Bulgaria, the program partners agreed (October 2008) that while only 900 target libraries could be supported directly and in full through the grant from the Foundation, the program should strive to involve the remaining number of up to 1,676 public libraries (which the partners considered to be optimal for Bulgaria) shall still remain under consideration as the grant implementation progresses.

The PMU and the Program Board will continuously monitor the availability of national and international funding sources that could be used to supplement the grant provided by the Foundation and the respective matching cost-sharing from central and local government budgets. The repetition of the needs assessment in 2010 will include all 2,300+ libraries that were subject to baseline needs assessment during the planning phase.

The program will ensure training for librarians from libraries that are not donated ICT equipment, and will involve these librarians in networking, communications and advocacy activities.

---

<sup>16</sup> See Section 3.4 for a description of the envisaged six equipment support packages for target libraries.

---

## 3. Project Design and Implementation Plan

### 3.1. Training

The program's training component aims to ensure better services for users of public libraries, including through more advanced assistance to users on the part of librarians. Trained librarians will be the agents through whom the benefits of the program will reach the population.

#### 3.1.1. Public Expectations from Library Workers

According to local stakeholder consultations<sup>17</sup>, library users expect library workers to be mediators between the library and citizens, as well as between the available information and user information needs. Library workers are also expected to be qualified, motivated and pro-active. Finally, library workers should possess skills, which are relevant to the 'new' role of the library in the community - communication skills, computer and foreign language skills, and service delivery skills.

#### 3.1.2. Library Training Needs Assessment

The library needs assessment found that 51.5% of interviewed library staff did not have library qualification and 5.1% did not respond to this question. Overall, 43% of interviewed library workers said they had no computer literacy and 5.3% did not respond to this question. These preliminary findings indicate that library staff needs to undergo targeted training in order to be able to adequately advise and train library visitors on using ICT and electronic information.

In addition, the PMU carried out a training needs assessment (TNA) in October-November 2008 to support the design of a training plan for library workers to build their skills in facilitating access to information among library users. A self-assessment questionnaire was developed and sent out to a representative sample of 460 library staff. The TNA reflected the geographical location of libraries and respondents were selected from district, town and chitalishte libraries. The TNA covered a proportionate representation of libraries from the planned six support packages under the program, and libraries with one, two or more staff.

#### 3.1.3. Findings from the Library and Training Needs Assessments

60% of the interviewed respondents from the sample of 460 librarians have library qualification and 40% do not have library qualification. The average age of library staff is 47 years regardless

---

<sup>17</sup> Six local stakeholder consultations – citizens forums - (conducted in July 2008) were held in the City of Pavlikeni - Veliko Tarnovo district, Panicherevo village - Stara Zagora district, City of Shivachevo - Sliven district, Targovishte - Targovishte district, Tsenovo village - Russe district and in Sofia. The purpose of the consultations was to support the design of the Impact Planning and Assessment Framework of the program. Stakeholders consulted were representatives of the various economic and social groups in the area, such as local authorities, public libraries, businesses, young people, school and academia, media, Chitalishte, other non-governmental organizations, interest groups, minorities, agricultural producers, housewives, elderly people, and people with disabilities.

of whether the library is located in an urban/rural area. Nearly two-thirds of all library workers have worked as librarians for over 10 years with the tenure of librarians in villages being longer than in towns. In towns, 17% of library workers do not have library qualification, whereas in villages this percentage is 53%. Approximately, 70% of the respondents have not attended any training beyond 2000, due to underestimating the importance of librarians training by the chitalishte boards and due to lack of funding (coverage of travel and subsistence expenses). Library staff with secondary education and staff working in chitalishte libraries who experience the greatest need to enhance their skills and knowledge, have not benefitted from ongoing professional training over the past 10 years. 85% of the assessed libraries do not provide online services to users and there is a need for planned training of staff in these libraries, initially focusing on building basic skills and gradually evolving to developing information advisory competences.

Continuing professional training for library workers (has been provided by the Center for Continuing Education of Librarians under a joint project of the BLIA and the Library School of Sofia University<sup>18</sup>. Out of 80 training courses provided to date, 88% have focused on ICT and online services in public libraries. Currently, courses are accessible only to librarians from big public libraries, which can afford at least a minimal budget for staff training. With rare exceptions, the chitalishte do not provide funding for training for their library workers. At present, the center offers the only opportunity for continuous training of library workers but it is inaccessible for the majority of librarians, especially those from smaller libraries. Whenever the center organizes training courses (based on project funding or when some libraries are able to pay participation fees) those are attended by librarians from the district libraries or from bigger chitalishte.

The TNA found disparities between: the knowledge and skills of library staff in district libraries and in chitalishte/municipal libraries; the quality and scope of library services offered; the training preferences of library staff in district libraries and in chitalishte/municipal libraries.

This conclusion is supported by the responses of computer literate library staff, as follows:

	<b>Self-assessment by librarians of their skills to train users</b>		
	District libraries	Libraries in towns	Libraries in villages
sufficient	71%	28%	14%
Insufficient	29%	72%	86%
	<b>Access to online services for users</b>		
	District libraries	Libraries in towns	Libraries in villages
Yes	97%	37%	15%

<sup>18</sup> This project, worth USD 50,000 was implemented in the period 2004 – 2006 with financial assistance from the Open Society Fund - Budapest. Upon completion of the project, the Center for Continuing Education of Librarians has continued functioning with funds from projects or from participant fees.

no	3%	63%	85%
----	----	-----	-----

Among the computer literate library staff covered by the TNA, district library staff always provide a higher self-assessment of their skills in Microsoft applications and in web browsers compared to chitalishte library staff.

District library staff do not need to learn basic skills on handling computers and information resources, or skills for library service delivery and organization. Their training should enhance and enrich the variety and quality of services they offer in the library.

Chitalishte libraries, especially those located in villages, seldom have ICT equipment in their facilities and their staff possesses poor basic computer literacy levels or is not computer literate, at all.

### 3.1.4. Training Plan

#### *Library staff*

The considerable gap between user expectations about the competencies of library workers and the latter's actual qualification levels (captured by the training needs assessment) calls for a systematic training of library workers during the implementation phase of the program. Library workers regard training as the most essential and important part of the program and are eager to benefit from this opportunity to advance their professional development in order to serve library users better.

The program aims to train 3,000 Bulgarian librarians in the period 2009 – 2013. The training will seek to build the following skill sets:

Prepare competent library workers who are able to:

- identify and diagnose user information needs
- consult users on information-searching strategies and techniques
- train users in:
  - computer literacy – first level;
  - information literacy – second level.

Capacitate library workers to:

- plan and effectively manage the library as a community information center
- submit successful project proposals and raise funding for the library
- develop local community programs, foster partnerships and win over advocates for the sustainable evolution of the library
- report and analyze the results of their library activities and successfully demonstrate the value and role of the library in the life of the local community
- communicate effectively with various groups of library users

These skills sets are incorporated in the competence profile of the librarian. This profile reflects the expected results from the training and will serve as a point of reference for evaluating the training results. The competence profile will be developed in two formats – for district library workers and for chitalishte/municipal library workers. The profile will also take into consideration the higher

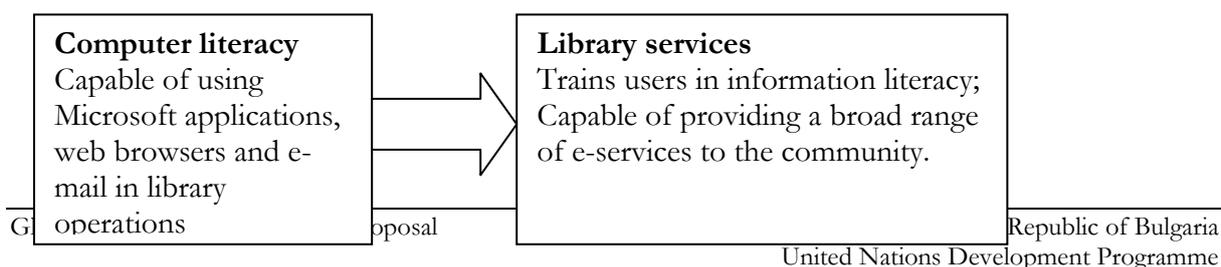
competence requirements of district library workers due to the role of their library as training and resource units under the program.

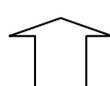
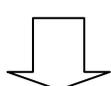
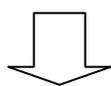
*Thematic training areas for library staff*

The training of library workers (a total of 3,000 trainees, an average of 250 hours per trainee) will evolve under three thematic areas:

<b>Information and communication technologies (computer literacy)</b>	<b>The library as a community information center (library management)</b>	<b>Modern library services (library services)</b>
<i>Total of 90 hours per trainee</i>	<i>Total of 80 hours per trainee</i>	<i>Total of 80 hours per trainee</i>
Introduction to computer technologies	Planning and organization of library activities Organization of information resources Networking between libraries	Information sources and modalities of access Legal and ethical aspects of information access
Microsoft Office applications for beginners and for advanced learners	Partnerships Advocacy Library programs for the local community	Reference services in the digital age Discovery tools Evaluation of web resources
Surfing the Internet	Fundraising and grant proposal processes	Advanced online search strategies and techniques
Internet communications	Marketing of library services	User training Information literacy instruction methods
Working with peripheral devices	Measuring and evaluating results	E-government services
The Library Web Page: Creating, maintaining and promoting the library web page	User needs assessment techniques	Creating local e-content
	Working with vulnerable groups	Communication and presentation skills

Development of competence skills of library workers through training will move from building basic to more advanced skills and will also ensure consistency and continuity between thematic training areas. The three thematic areas for building “effective” library competence skills are related in the following manner:





**Library management**

Capable of managing the library as a community information center

*Customized training modules*

Training modules in the three thematic areas will be tailored to the needs of all 3,000 librarians (including the 30% of librarians who report to have been trained in IT, as well as the newly-appointed library workers at target libraries) which comprise of: district library workers and library workers from chitalishte/municipal libraries. For instance, district library workers have indicated a preference to gain more advanced Microsoft Word and Microsoft Excel skills, as well as skills to use Microsoft Publisher and Microsoft Access, whereas library workers from chitalishte/municipal libraries have said they need to learn Word and Excel for beginners. While staff at smaller libraries would like to learn when and how to use search tools and directories, their peers at district libraries prefer to learn in greater detail about global web developments, e.g. the Invisible web, the Semantic web, digitalization of cultural heritage.

According to the library needs assessment, different groups of users (e.g. students, people in active age) have different interests. No substantial differences have been registered between people living in small settlements and those from large settlements. However, library workers in large settlements are more qualified than their peers in small settlements (in chitalishte libraries). An additional challenge facing a library worker in charge of a small chitalishte library is that often s/he is the only person organizing, sustaining and implementing library activities. Consequently, the training planned for district library workers will focus on developing their capabilities to advise library staff from chitalishte libraries in their respective district.

The training/advisory function of district libraries vis-à-vis chitalishte / municipal libraries is embedded in their statutory job descriptions and is thus funded within their regular budgets. This need was also confirmed by the stakeholder consultations, where respondents shared the opinion that the district library could be a consultative/resource center for all chitalishte libraries based on a peer-to-peer training approach - “libraries train libraries”.

Differences in the competence levels and scope of services available in district and chitalishte libraries determine the sequence of training delivery in the three thematic areas. Chitalishte library staff should cover courses from the Information and Communication Technology thematic area prior to the Modern Public Library Services thematic area. District library staff can start the training program directly in Modern Public Library Services thematic area because district library workers already have basic ICT skills. Since district libraries and some more advanced chitalishte libraries have been selected to pilot training delivery for local communities, it is essential that at the very outset of the training program, district library workers and the staff of the more advanced chitalishte libraries are trained in training users.

Courses from the Library as a Community Information Center thematic training area may run in parallel for both beginners and advanced and when convenient for trainees, because this thematic training area does not require basic ICT skills but is directly linked to the successful functioning of libraries.

---

### *Training centers*

The program envisages equipping training labs in the 27 district libraries. Furthermore, in some 50 advanced chitalishte/municipal libraries, which can accommodate up to 10 computer workstations for library users, the computer workstations will also be used for training purposes. These two types of training centers correspond to the preferences of the interviewed library workers about preferred training venues. Half of the respondents indicated that the district library in the district center would offer them better conditions to concentrate on the training process. Additionally, they claimed they would be able to explore on the spot the district library collections and services in order to use these resources when serving their communities. The other half of the respondents said that the municipal center would be a more convenient training location for them since they would not have to spend several days away from their homes and families.

### *Pool of trainers*

Training for librarians will be delivered by a pool of approximately 150 trainers – this estimate is based on the assumption that each of Bulgaria’s 28 administrative districts will be serviced by circa 5 qualified trainers specializing in one of the three thematic areas. Trainers will be drawn as much as possible from the local/regional levels in order to ensure long-term viability of the newly established pool of trainers and to minimize costs. The responsibility for identifying, monitoring and updating the pool of trainers will be shared between the program team<sup>19</sup> and the 27 district libraries. Trainers will be selected from the following categories of professionals:

- highly qualified librarians from the district libraries or from well-functioning chitalishte libraries;
- IT specialists from the district libraries or other IT professionals;
- professionals from the academia, private or third sectors.

The trainers will be selected on a competitive basis - their qualifications and professional experience will be initially assessed during the selection process through short listing, interviews and teaching demos. An important selection criterion will be the candidate’s inclination to teach practical skills in an accessible manner. Later on – in the course of training implementation the quality of training delivery will be monitored (monitoring protocols to be established) by the program team and external consultants, and documented. The pool of trainers will be modified as needed.

### *Training of the trainers*

The 150 trainers will be trained on teaching the three thematic areas with a focus on the following:

- mandatory skills for library staff in the target libraries to ensure the successful implementation of the program; methods to build these skills;
- adult training methods (the average age of trainees is 47 years);
- educational skills and effective communication with the audience.

---

<sup>19</sup> More specifically the two Training Specialists, the Monitoring and Impact Specialist and the three Field Coordinators. See Section 5 for more details.

---

The 150 trainers will be trained by a team of 15 core trainers specialized in library, IT and organizational development. Substantial training experience will be required for the core trainers who shall be university teachers, teachers from the Center for Continuing Education of Librarians, experts from the third sector, and prominent library practitioners with experience from similar projects, etc.

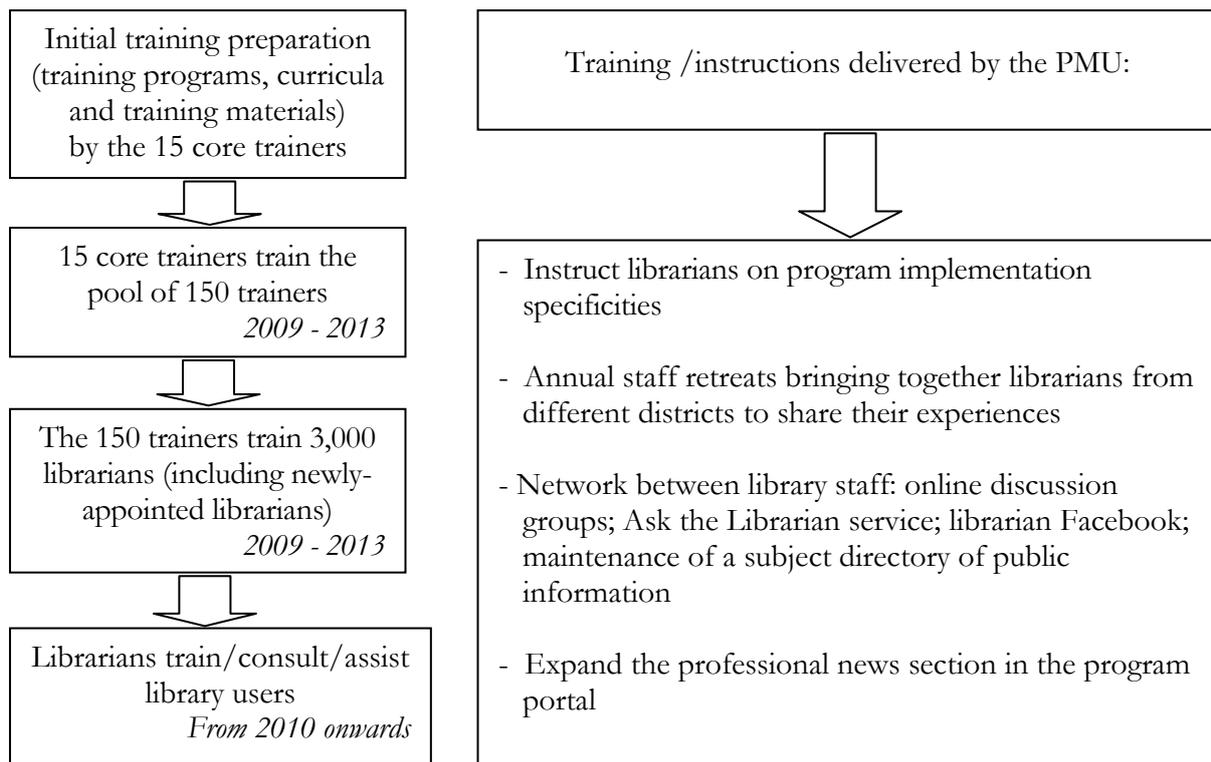
The 15 core trainers will be selected on a competitive basis. International experts will also be invited to the core trainers team. The composition of the core trainers roster will have started already during the planning phase and will be effected with the utmost care by the program team and partners.

It is expected that the 15 core trainers will actively participate in monitoring the quality of training delivery by the pool of 150 trainers.

Training delivery in the three thematic areas will be accompanied by instructions delivered by the program team and also by librarian discussion groups, professional news, maintenance of a thematic directory and other activities initiated and coordinated by the program team.

---

Training flowchart:



*Training modalities*

The program envisages two training modalities:

- traditional training sessions in a training hall equipped with computers, multimedia and access to the Internet;
- online self-paced training provided through the program portal, which will serve as a virtual resource center providing online training content and various self-paced online tests to check progress.

Online self-paced training will be offered on an ongoing basis as an option to librarians who are unable to attend the traditional training sessions, as well as to librarians who prefer a self-paced learning process. The costs for all training modules and materials of the program portal will be covered by the program budget. Management of the portal's training module will be performed by the PMU (there are two training specialists and a library associate in the PMU) and external consultants, and costs will be covered by the program budget. The PMU will register online the trainees. At this stage the online training will not be moderated by an online tutor but will rather comprise of interactive software packages.

*Training programs and training materials*

In order to ensure a uniform process of building priority skills for library workers in the 27 district libraries which will serve as training centers under the program, the core trainers will develop training programs and training materials, and will develop methodological guidelines for

---

topics in the three thematic areas. To make user training easier for library staff, model ICT and information literacy lessons will be developed for users along with self-study materials.

The training materials will be updated and revised on an annual basis to take account of:

- new network technology developments;
- recommendations of library staff attending the training sessions and the evolving needs of local communities.

The training program will take advantage of ready-to-use training handbooks which correspond to the thematic scope and purposes of the Global Libraries Bulgaria program. One such training handbook is the publication “The Library as a Community Information Center: Guidelines for Planning” of the BLIA, produced in 2006 under the ABLE project.

#### *Cooperation within the library community*

The Global Libraries – Bulgaria program will cooperate closely with BLIA, the Union of Bulgarian Chitalishte, the National Library, the 27 district libraries and with higher library educational institutions. Through its portal, the program will make available the results from library assessments, training needs, public attitudes, to all library researchers and practitioners. Considering that such large-scale comprehensive surveys have not been conducted over the past 20 years, the available empirical data will be extremely important for research purposes and for national information policy priorities. Library school faculties will have the opportunity to participate in library staff training, monitor closely the evolution of the program and use its results and good practices when teaching students of public library management and services.

#### *Support to the development of information literacy guidelines*

The Bulgarian library and educational communities are facing the issue of developing information literacy guidelines for secondary and higher education. The program will initiate an adaptation of the international information literacy standards to the Bulgarian context. The core trainers and the regional trainers will adjust their training plans and tools to ensure targeted and gradual development of information literacy for unprepared library staff and users. The information literacy guidelines will be recommended to the educational institutions and to the entire library network (public, school and university libraries). In this manner the program’s impact will also extend to the educational sector.

#### *Development of the capacity of district libraries*

District libraries will be supplied with ICT training labs. During the program’s implementation, district libraries will have on hand qualified trainers, developed training programs and equipped computer labs. Since district libraries are mandated by law to train the libraries in their respective district, they will be able to use their new training resources and facilities to also educate librarians from libraries that are not included in the program to receive ICT equipment. In this way, the program will significantly contribute to the sustainable development of district libraries as training and resource centers both during the program implementation phase and thereafter.

#### *Participation of chitalishte libraries in relevant professional forums*

---

As a result of limited financial resources, most chitalishte libraries cannot afford to attend professional conferences and training workshops. This cuts them off from their peers and new library practices. The program will enable active librarians from target chitalishte libraries in remote communities to participate in national forums and share good practices under the program. national forums.

### *Training of users*

The program will invest in training 3,000 library workers so that they can in turn successfully train/consult/assist users in gaining digital and information literacy.

Library workers who have never used computers and who will need longer time before they can help others will employ what they have learned during a 5 days hands-on practice in provision of ICT help to users in the presence of the respective IT person and/or trainer. Librarians with initially non-existent ICT skills will be given priority for inclusion in the program's training component. In addition, librarians with initially non-existent ICT skills will be encouraged to find alternative solutions for providing ICT help to library users such as: using volunteers, relying on the regional IT support staff, peer exchange. The program team will make a conscious effort to ensure that newly procured ICT equipment under the program is utilized as soon as it is available in the library.

A survey of the capacity development needs of local communities was conducted in September – October 2008 through self completed questionnaires and focus groups. Four target groups were identified: library staff (librarians and IT experts); children/students; pensioners; active population.

According to the library training needs assessment, 71% of district library workers and 28% of library workers in libraries outside district towns believe they have sufficient knowledge to train users. The program will thus pilot user training/consulting/assisting in these libraries at the end of 2009. There will be two types of user training/consulting/assisting in these libraries:

- a) Training/consulting/assisting individual library users in the process of searching/browsing the Internet and working with Microsoft office applications in the library;
- b) Group training offered to users in the training labs in the 27 district libraries and in some 50 advanced chitalishte/municipal libraries<sup>20</sup>. Group training will also be offered in smaller chitalishte libraries subject to local needs.

Both types of user training will be a result of the skills building/training of librarians provided under the program and will be supported methodologically by the program team (e.g. through peer exchange, user guidelines, best practices). Good practices will be widely disseminated across the public libraries network.

In 2010-2011 the program will gradually include libraries whose staff has completed all three thematic areas. In the meantime, communication and advocacy activities and results from the provision of new library services will have attracted volunteers in support of access to information – secondary school students and pensioners (especially retired librarians).

---

<sup>20</sup> This will take place in chitalishte/municipal libraries which can accommodate up to 10 computer workstations for library users, which will be also used for training purposes.

---

### **3.1.5. Assessment of Training Needs**

Training needs will be assessed continuously during program implementation. It is expected that the training needs of librarians will evolve along with the dynamic development of new technologies. This will require regular updates of the competence profile of the librarian. The assessment of training needs will involve data collection, processing and analysis. In addition, the program will also use a variety of assessment tools and methodologies such as monitoring, interviews, questionnaires and surveys (including online), focus groups, desk research, gap analysis (between the current status and the desired change), scaling and ranking, and prioritizing.

Consultants or a sub-contractor will be engaged for that purpose and will rely on the organizational assistance and expertise of the District Coordinators. The results of the assessments of training needs will be used for the update and/or revision of the training plan.

In the third year of program implementation (2011), the program plans to undertake another comprehensive library needs assessment which will also include training needs assessment. The results will be compared against the benchmark assessment conducted in 2008 and will be used for effective planning of necessary changes.

### **3.1.6. Assessment of Training Effectiveness**

Assessment of training effectiveness will be integrated within the overall process of program monitoring and impact assessment. The success of the training program and the effectiveness of the newly-established training centers will be subject to periodic evaluation, which will inform the updates/revisions to the training plan. In order to improve the training process, trainees will be requested to complete evaluation questionnaires in the beginning and in the end of the training cycle.

### **3.1.7. Post-grant Training**

A sustainability strategy for the program will be developed at the end of the second year of program implementation, which will also outline specific responsibilities with regard to training in the post-grant period. At the district level, continuing training will continue to be delivered by the new training centers created in the 27 district libraries and in some 50 chitalishte libraries located in municipal centers.

## **3.2. Content**

### **3.2.1. Information Needs of the Target Population**

The information needs of the program's target population were explored through six citizen forums conducted in July 2008 as part of the design process of the Impact Planning and Assessment Framework. These forums took place in different locations – chosen for having the typical characteristics of the settlements hosting the majority of public libraries that were subject to needs assessment.

In addition, focus groups with students, pensioners and active age citizens were organized as part of the libraries outreach needs assessment (September 2008). The participants in the focus groups also submitted self-completed questionnaires describing their information needs.

All target population categories pointed out the scarcity and/or lack of print and electronic resources. Even the users of the relatively better developed district libraries would like to access more books and electronic resources. While the majority of district library users have certain experience with Internet, very few users in smaller settlements are familiar with using the net. However, their expectations about the kind of information they could find on the free web are realistic, probably due to general knowledge from the press and the TV, as well as from hearsay. Users in medium size towns and district centers showed awareness of subscription-based full-text online databases, and expressed a need to access legal information sources.

The following information needs by target category were identified through the citizen forums, focus groups and questionnaires:

<b>Population Category</b>	<b>Subjects of Interest</b>	<b>Skill Development Needs</b>
Pensioners	health care opportunities, medicine, retirement policies and procedures, social security, agriculture, farming, history, politics	basic computer skills; ICT-enabled basic communication skills; Internet browsing and searches
Active age	career and life-long education opportunities, legal and business information, human rights, access to subscription-based online databases in various subjects	ICT skills; effective and/or broader usage of search tools and info sources
School children and students	school curriculum related materials to assist home assignments, education and career opportunities; dictionaries and encyclopedias	understanding of the nature of library collections and the free web; search techniques; evaluation of free web content and resources

### **3.2.2. Content Use to be Supported by the Program**

The existing free web content in Bulgarian language, although quite rich, is underused. The first reason is lack of public access to computers; the second – insufficient information literacy skills of citizens. Electronic publishing (subscription-based e-books and aggregated databases), with few exceptions, is not yet developed in Bulgaria. Therefore, in general, public libraries do not offer subscription-based online resources. The program will help address the following information needs: a. access to networked information (free content, including locally generated e-content and subscription-based sources); b. information literacy guidance to users.

The leading principles in supporting communities to develop content will be a strive for qualitative and reliable information sources rather than information in general, as well as a proactive participation of librarians in the provision of free and subscription-based resources to users.

At the central level, the program web portal - maintained and moderated by the PMU - will be a key tool for content development (e.g. it will offer a directory of free web resources on community information – consisting of web sites that will be selected and evaluated by librarians). Through the portal, librarians from the country will network and exchange

information to identify user needs and new sources and ways to address them. The portal will offer toolkits for librarians (e.g. “Information sources on starting a small business”) to assist them with identifying the best sources for a particular subject.

The Library Services Manager together with the Portal Associate/Translator at the PMU will be responsible for maintaining the relevant information on the program’s portal, and also for facilitating its use and creation of local content by librarians across the country. The three Field Coordinators at the PMU will monitor and encourage the use of the program portal by librarians.

The program’s web portal was designed and launched already during the Planning Grant Phase in 2008. The portal’s development was funded from the Planning Grant. The portal’s upgrades during the Country Grant Phase will be funded from the country grant. These upgrades will be coordinated by the PMU in consultation with the program partners, and will be effected by an external subcontractor.

Also at the central level, the Ministry of Culture will organize and fund a joint subscription for target libraries to existing databases – legal information, dictionaries, encyclopedias, school-education materials.

At the local level, community members will be sensitized to partnering with librarians in documenting and posting on the web the community memory and heritage, and to present in an attractive way the community portrait. The outreach needs assessment of the planning phase (August-September 2008) revealed that people do not perceive such activities as a responsibility of the library worker only, but see the community’s active role in this respect.

The program’s Plan on E-content is presented in the table below:

<b>E- CONTENT - NATIONAL LEVEL</b> (resources for all target libraries)	
<b>What</b>	<b>How</b>
Subscription (national license for) to: <ul style="list-style-type: none"> <li>• CIELA legislative database – laws, regulations, state gazette, full-text articles from 34 newspapers (incl. archives)</li> <li>• Znam.bg reference portal (multimedia encyclopedias edited by the Academy of Sciences; dictionaries and fiction – Bulgarian and foreign; education materials for teachers and students)</li> </ul>	The Ministry of Culture will organize and fund a joint subscription for all target libraries.  Training of library workers will be conducted in: <ul style="list-style-type: none"> <li>- effective use of information sources;</li> <li>- assistance to users in searching, retrieving, e-mailing or printing info</li> </ul>
Directory of free web resources on community information (health care, job opportunities, EU funds, education) – selected and evaluated by librarians to be used by all public libraries with Internet access.	The ABLE portal ( <a href="http://www.ableportal.bg/bg/index-bg.html">http://www.ableportal.bg/bg/index-bg.html</a> ) will be developed further to meet community needs and will be incorporated into the program portal.

	<p>Volunteer librarians at target libraries will select and recommend websites to be included in the program portal.</p> <p>Librarians from around the country will network through the program portal to identify new information sources and user preferences.</p>
<p><b>E-CONTENT - DISTRICT LEVEL</b> (resources of the district libraries)</p>	
<b>What</b>	<b>How</b>
Digitize archives, photos, and rare books.	Provide resources about digital collections organization and standards from the program portal. Support target libraries staff to participate in national workshops on the topic.
Some web content on the websites of district libraries could be useful for all libraries – content for children, school materials, e-bibliographies.	Promote through the directory of web resources on the program portal. The higher usage will stimulate further enrichment of the content by librarians and communities.
Some district libraries provide information about chitalishte libraries in the area. This information could be expanded by submitting regular updates about these libraries and their communities.	Promote through the directory of web resources on the program portal.
<p><b>E-CONTENT - LOCAL LEVEL</b> (individual libraries)</p>	
<b>What</b>	<b>How</b>
<p>Create library web pages or use chitalishte and municipal web sites to upload:</p> <ul style="list-style-type: none"> <li>● local news</li> <li>● administrative information from the municipality</li> <li>● information on schools, companies, NGOs, health care</li> <li>● works by local authors/artists</li> <li>● children’s creative works</li> <li>● digitized chronicles of the chitalishte</li> <li>● tourist information</li> <li>● genealogy trees</li> <li>● cultural heritage</li> <li>● photo gallery</li> <li>● virtual forums for discussions</li> </ul>	<p>Provide technical support (PCs, scanners, digital cameras) to create local web content. Train library staff on using the equipment.</p> <p>Provide training in web editing skills to librarians.</p> <p>Provide guidelines and good practice examples from the program portal (including partnerships with community organizations in creating content).</p> <p>Promote through the program portal and other program communications channels library programs such as “Children – creators of the cyberspace” (Shumen District Library).</p>

	Encourage and support citizens to create or collect local content.
Contribute to the Bulgarian version of Wikipedia by submitting entries related to local history, geography, economy, institutions, traditions (already done by some libraries)	Train library staff and the community to edit and submit information to Wikipedia.bg. Such examples already exist. They will be promoted and multiplied.

### 3.3. Procurement of Goods and Services under the Program

The table below lists the types of goods and services for each budget category in the TCO model:

TCO Budget Category	Foundation & Microsoft				Grantee		
	PMU Staff & Consultants	Sub-contractors (Companies)	Supply of goods	Donation	Consultants & Library Staff	Sub-contractors (Companies)	Supply of goods
Computer Hardware			X				
Computer Software				X			
Network Equipment & Installation						X	
Internet Connectivity						X	X
Building & General Equipment						X	
Training of Trainers	X		X				
Training Staff	X		X				
Personnel and Direct Admin	X		X				
District Library Capacity Building	X		X		X		X
Program - Institutional Capacity Building	X	X					
Technical Support	X				X		
Capacity building of library system					X		
Advocacy & Communication	X	X	X				
Evaluation	X	X					

#### 3.3.1. Procurement Processes

As was the case with the planning grant, the country grant will be implemented under the UNDP national execution (NEX) modality<sup>21</sup>. NEX contributes to the sustainability of development projects by increasing national ownership and commitment to program activities and objectives.

<sup>21</sup> UNDP has three project execution modalities – national execution (NEX), direct execution (DEX) and execution by a non-governmental organization (NGO execution). NEX is used whenever there is adequate capacity in the national authorities to undertake the activities of the project.

---

The national institution that manages the project must be the one most closely concerned with the program activities. The Ministry of Culture (lead organization for this program) has designated one of its officials (the Director of the National Culture Fund) to act as a National Program Director (NPD). The NPD supports represents the national institution in the daily decision-making related to program implementation, including procurement processes.

In line with the approved annual program work plan and budget and at the request of the Program Manager, UNDP will recruit project consultants, sub-contractors and suppliers, and will effect payments in full compliance with the corporate UNDP requirements for competitive bidding, best value for money, transparency, accountability, efficiency and non-discrimination. The UNDP procurement policies and procedures (*Contract, Asset and Procurement Management*) will be applied to the Country Grant. The procedures for recruitment of program personnel (new and/or unoccupied positions), as well as the procedures for procurement for goods and services, and the procedures for recruitment of consultants are provided below.

#### *Program personnel*

- Upon consultation with the NPD, the Project Manager submits for approval terms of reference (TOR).
- UNDP advertises the positions based on the TORs using media adverts, a national newspaper, UNDP and Government Institution websites and online job portals.
- CVs are collected by the PMU within the deadline.
- Prescreening is done by the Program Manager, UNDP and by the NPD. At least three candidatures are short-listed for each position.
- Interviews with the short-listed candidates take place. Candidates are rated according to evaluation criteria formulated in advance.
- The Interview Panel consists of at least:
  - o UNDP Representatives (UNDP Program Officer and/or Program Associate)
  - o Ministry of Culture Representatives (NPD and other officials as needed)
  - o Other Program Partner Representatives (as appropriate)
  - o PMU representatives
- UNDP and the respective job holder sign a contract in UNDP format.

#### *Goods and services*

##### ➤ Request for Quotation - RFQ

An RFQ is an informal invitation to submit a quotation, usually for goods/services/civil works at a value between USD 2,500 and USD 100,000. Prices, and other commercial terms and conditions are requested, and award is made to the lowest-priced technically acceptable offer.

##### ➤ Request for Proposal - RFP

An RFP is a formal request to submit a proposal, usually associated with services, which can not be clearly or concisely defined, and where inputs on the methodology for carrying out the assignment are expected from the proponents. Price is only one of several factors comprising the evaluation criteria. The other criteria are related to the responsiveness and quality of the proposal, as well as to the qualifications/experience of the proponent. Award is made to the qualified bidder whose bid substantially conforms to the requirements set forth in the solicitation

---

documents and is evaluated to be the lowest cost to UNDP. The principle of best value for money is applied.

➤ Invitation to Bid - ITB

An ITB is a formal invitation to submit a bid, usually associated with requirements that are clearly and concisely defined, with an estimated procurement value of USD 100,000 or more. Normally price is the sole determinant in making an award. Where all technical criteria are met, award is made to the lowest bidder.

Procurement up to USD 499: effected against a supplier's invoice through direct purchase by the PMU.

Procurement from 500 to 2,499 USD: the PMU prepares a TOR / technical specification, and submits to the UNDP Program Officer for clearance. The PMU assesses the best price, prepares a request for payment with all supporting documents and submits to the respective UNDP Program Associate for payment. The latter ensures accuracy and submits the request for payment to the UNDP Finance Unit for processing.

Procurement from 2,500 to 10,000 USD: the PMU prepares a TOR / technical specification, and submits to the UNDP Program Officer for clearance. TORs / technical specifications are consulted with the NPD prior to UNDP clearance as needed. The PMU sends an RFQ to at least 5 suppliers. The PMU evaluates the offers and prepares a duly signed evaluation report, which is submitted to UNDP for endorsement and contract award.

Procurement from 10,000 to 99,999 USD:

➤ Request for Quotation - RFQ

The PMU drafts the TOR / technical specification, using external expert input or outsourcing the services as needed. the RFQ is either advertised publicly, or is sent to a short-list of suppliers, agreed upon between UNDP and the Ministry of Culture. The PMU collects the offers and prepares an evaluation report to assess their responsiveness and price-ranking. The PMU submits the documents to the Project Contract Committee (PCC), composed of the Program Manager, the National Program Director and the UNDP Program Associate responsible for project. External expert services are engaged as necessary. For amounts above 30,000 USD, the case is presented to the UNDP Contracts, Assets and Procurement Committee (CAP) for review and approval.

➤ Request for Proposal – RFP

The Program Manager drafts the TOR, consults it with the NPD as needed and sends it for clearance to the UNDP Program Officer. The UNDP Program Associate prepares the RFP form (standard UNDP format, which contains the evaluation criteria that will be applied). UNDP initiates the competitive bidding through public advertising or by inviting proposals from a short-list of at least five qualified suppliers, agreed in advance between UNDP and the Government Institution. A committee composed of the Program Manager, the National Program Director, a UNDP representative and other experts as required, evaluates the proposals and approves the selection. For amounts above 30,000 USD, the case is presented to the UNDP Contracts, Assets and Procurement Committee (CAP) for review and approval.

---

Procurement above 100,000 USD: the Program Manager drafts the TOR, consults it with the NPD as needed and sends it for clearance to the UNDP Program Officer. The services of external experts are engaged as needed. The UNDP Program Associate prepares the ITB/RFP form (standard UNDP format, which contains the evaluation criteria that will be applied). UNDP initiates a formal international competition process through advertising or inviting bids/proposals from qualified suppliers through Invitation to Bid (ITB) or Request for Proposal (RFP). The Project Contracts Committee (PCC) in consultation with an external expert, as needed, evaluates the bids/proposals, prepares a duly signed evaluation report and submits it to the UNDP CAP for review and approval. The UNDP CAP recommendation, approved by the Resident Representative, is forwarded for final clearance and approval to UNDP Headquarters Advisory Committee on Procurement (ACP).

### *Consultants*

The Program Manager identifies the need for a consultant, prepares a TOR, consults it with the NPD as needed and submits it for clearance to the UNDP Program Officer. The PMU positions an advert for consultants in a national newspaper and/or relevant websites, or invites at least three consultants from a roster or short-list that has previously been agreed upon by UNDP and the Government Institution, to submit their CVs. Any responsive CVs from previous advertisements or agreed rosters can be used for next assignments as well. The candidates are evaluated by a committee composed of at least the Program Manager, the UNDP Program Officer and the National Program Director. Final selection is done based on qualifications and experience adequate to the requirements of the TOR. The Program Associate prepares a contract and submits it to the UNDP Resident Representative for signature.

### *Legal aspects impacting procurement, contracting and payments*

UNDP will provide technical assistance and overall management support to the program, and will act as fiscal agent (implementing agency in the UNDP terminology). Contracts will be issued by UNDP and will be managed according to the UNDP Bulgaria Program Circulars, Operations Circulars and Internal Control Framework<sup>22</sup>.

Payments from the country grant allocation will be effected by UNDP. UNDP will enter into contractual arrangements with physical and legal entities throughout the duration of the country grant against all relevant lines of the approved budget and up to the approved amounts. The UNDP standard contract forms for procurement of goods and services will be used.

The management of country grant funds, including disbursements, record-keeping, accounting, reporting and auditing, will be done in accordance with UNDP rules and procedures. Disbursements will be effected at the request of the PM by UNDP as direct payments.

In line with the approved work plans and budget and at the request of the PM, UNDP will recruit PMU staff, program consultants, sub-contractors and suppliers, and will effect payments in full compliance with the corporate UNDP requirements for competitive bidding, best value for money, transparency, accountability, efficiency and non-discrimination.

---

<sup>22</sup> These are specific UNDP Bulgaria rules and guidelines, which are fully in line with the corporate rules and guidelines, and which outline in detail the steps, roles, procurement and payment authorization levels for each category of action.

---

The UNDP procurement policies and procedures (*Contract, Asset and Procurement Management*) will be applied to the country grant.

*Overall legal context*

The Standard Basic Assistance Agreement (SBAA) between the Republic of Bulgaria and UNDP, which is a pre-requisite for UNDP program support, was signed between the Bulgarian Government and UNDP on 20 August 1992. This program shall be implemented in accordance with the provisions of the SBAA and its Additional Protocol as ratified by the Bulgarian National Assembly.

Provided that the Foundation takes a decision to disburse the requested country grant and upon signature of a Letter of Agreement for the country grant, the key program partners in Bulgaria will sign a Project Document in the UNDP format. The Project Document will be formulated to fully reflect the approved Country Grant Proposal and will be signed by the Ministry of Culture, BLIA, SAITC, UNDP and the Ministry of Foreign Affairs. The Ministry of Culture, in its capacity of lead organization for the program, will sign the Project Document as executing agency (UNDP terminology). The BLIA, SAITC and NAMRB will sign as partners (UNDP terminology). UNDP will sign the Project Document as implementing agency (UNDP terminology), and the Ministry of Foreign Affairs will sign as Government Coordinating Authority for UNDP in Bulgaria. The Project Document shall constitute the legal framework for the program in Bulgaria. The Project Document will be fully in line with the provisions of the Country Grant Proposal.

Initially, the ownership of goods and services procured with funds from the country grant will rest with UNDP as a fiscal agent for the program. Transfer of ownership will occur during or at the end of the country grant implementation, following the UNDP rules and procedures.

### **3.3.2. IT Equipment**

The maintenance and upgrades of IT equipment will be coordinated by the two IT Managers at the PMU.

Most vendors on the Bulgarian IT market offer the following warranty support period, which practically covers the useful life of public access equipment:

<b>Type of equipment</b>	<b>Warranty support period</b>
Workstations	3 years
Printers/Copy Machines	1 year
Servers	5 years

The IT equipment will be insured against natural disasters and theft. Replacement of IT equipment prior to expiration of the warranty support periods will be effected only in the case of unintentional damage. The costs for equipment repairs, not covered by the warranty support will be covered by local beneficiaries.

In principle, the costs for equipment replacement will be covered by local beneficiaries – the chitalishte (in the case of chitalishte libraries) and the municipality (in the case of municipal libraries). The PMU will collect information on the physical condition of the procured IT

---

equipment on a quarterly basis, and will recommend replacements to the Program Management Committee in case of budget savings. The PMU will only take into consideration the equipment supplied under the program. The approved list of equipment replacement will be used to prepare technical specifications for supply of new equipment according to the available technologies on the Bulgarian IT market.

The PMU will conduct ad-hoc on site verifications of the IT equipment. The PMU will also request periodical reports on the equipment status from the regional IT support staff.

#### *Computer software envisioned in the program*

The software applications for workstations procured under the program will be selected from the most recent list of Products Available for MS Software Donations Program and will include MS Windows operating system and MS Office packages.

It has been discussed and agreed with the foundation that target libraries will have the opportunity to choose additional software applications from the list of Products Available for MS Software Donations Program.

### **3.3.3. Internet Connectivity**

The development of Internet connectivity in Bulgaria is uneven, with several types of connectivity: ADSL, SDSL, broadband, cable TV, dedicated phone lines, local LAN, mobile Internet, satellite. Bulgaria does not have a unified Internet connectivity infrastructure. In order to identify the optimal solution for providing of internet access to the libraries, the PMU analyzed the following two options for internet provision:

#### *The option of centralized provision*

In cooperation with the SAITC, the PMU reviewed the development of the centralized fibro optic National ATM<sup>23</sup> network of the State Administration (NATMSA) and its readiness to meet the Internet connectivity needs of the program's target libraries. Despite its ongoing expansion, the NATMSA is operational only in a limited number of settlements and it services mainly state institutions such as police stations, courts, Registry Agency and the National Revenue Agency, etc.

In order to estimate the cost of centralized Internet connectivity, the PMU reviewed the results of some public procurement procedures published on the Bulgarian Public Procurement Agency website ([www.aop.bg](http://www.aop.bg)) and conducted meetings with representatives of entities using centralized connectivity: Ministry of Justice, Registry Agency, National Revenue Agency, Courts, National Lottery, private companies with national coverage. These organizations reported low level of satisfaction with centralized connectivity services in small settlements. Moreover, there is no single company providing centralized Internet connectivity and system administration for the whole country; consortia are formed in the cases of centralized provision of Internet, which may post a risk to the timeliness and efficiency of program implementation.

#### *The option of local provision*

---

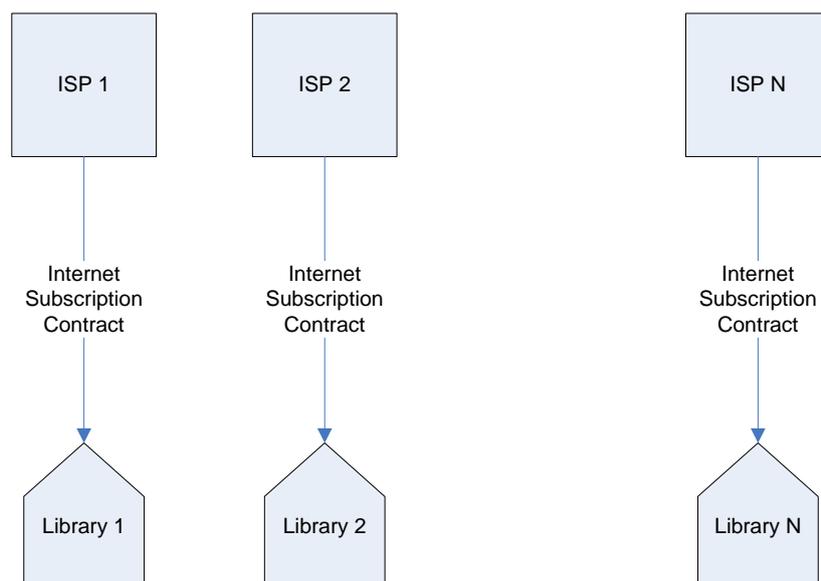
<sup>23</sup> Asynchronous Transfer Mode

A verification of the current Internet access situation was conducted during the planning phase as part of the library needs assessment. Circa 40% of the surveyed 2,351 libraries reported availability of Internet access in their buildings, and therefore existence of local Internet service providers in their respective settlement. Most libraries that are currently connected to the Internet use a speed higher than 128 kb/s. According to the e-Infrastructure experts consulted during the planning phase the price estimate for Internet access provided locally is roughly 100 BGN/month, which is an affordable monthly fee.

### 3.3.4. Program Approach to Telecommunication Requirements

It was concluded that currently, in the case of Bulgaria’s public libraries, the centralized provision of Internet connectivity would be too expensive and ineffective. This option cannot meet the program needs due to the practical impossibility and/or high cost of covering a large number of access points (900) located mostly in small settlements.

The availability of Internet will be a prerequisite for target library inclusion in the program. The local institutions in charge of target libraries will be required to identify a local Internet Service Provider (ISP) and to contract its services at their own expense. The diagram below visualizes the program’s initial idea for approaching the issue of connectivity:



The program partners consider that a bandwidth of 128 kb/s is not sufficient for an effective usage of Internet services at public libraries (Internet browsing and online functions). This is why a minimum bandwidth of 512 kb/s will be required for inclusion of libraries into the program. The type of connectivity (ADSL, broadband, local LAN or other) will not be specified and/or recommended by the PMU due to the lack of a unified technology across the country. However, the PMU will require a written contract for Internet subscription for each target library.

For an effective usage of applications requiring Internet connection (appropriate downloads for Web 2.0, learning technologies, VoIP, chat applications, online TV, e-mail, etc.) the PMU will recommend to target libraries to contract an Internet subscription of minimum 2 Mb/s. In the case of problematic Internet connectivity in smaller towns and villages, the PMU is authorized by program partners to accept a bandwidth of minimum 512 kb/s. The PMU will assist the local institutions in charge of target libraries in negotiating with ISPs as necessary and will

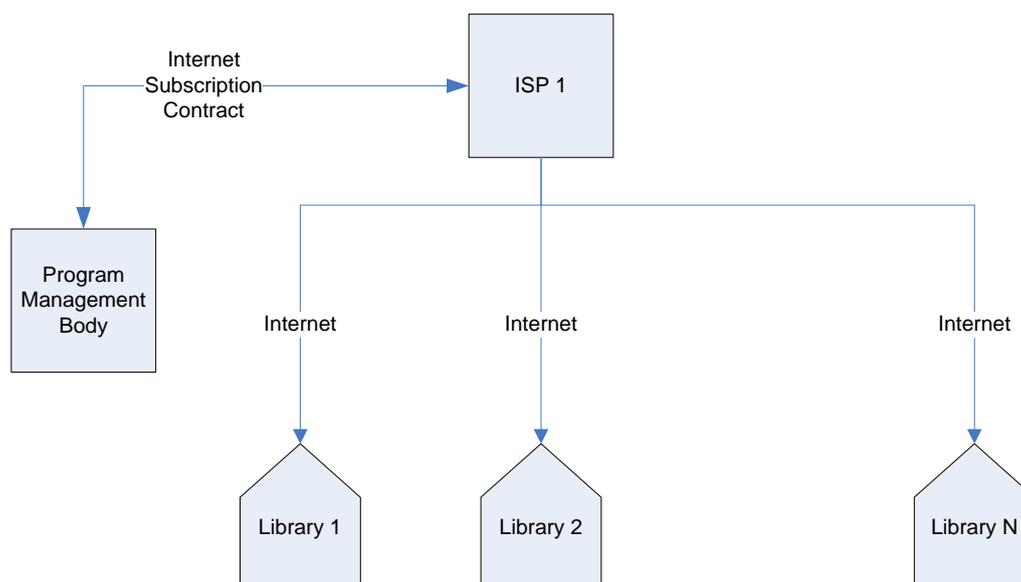
---

continuously research the ISP market for opportunities to improve the Internet services provided to target libraries. The program portal will be used for providing information about Internet connectivity options in the different regions of Bulgaria and for publishing positive and negative experiences.

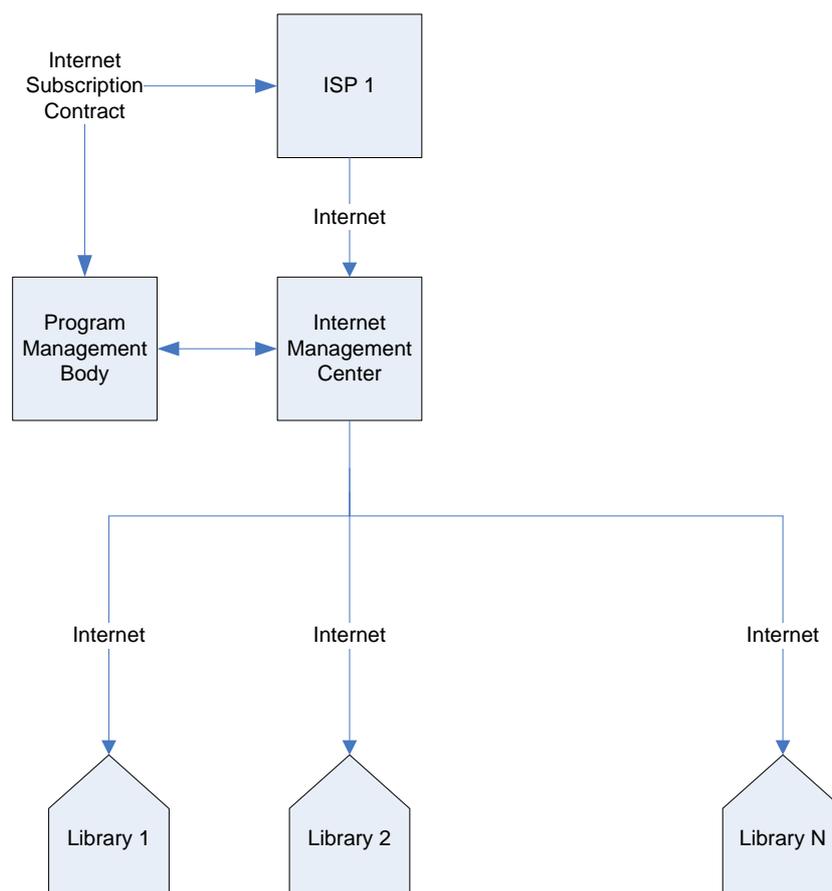
The PMU, the 28 District Coordinators and the IT support staff will verify the existence of Internet connectivity (including contracts with the local ISPs) in the target libraries prior to the delivery of equipment supported by the program. If connectivity is missing or inadequate, the PMU will recommend measures for improvement and, if necessary, postpone the equipment delivery.

In view of the continuous improvement of the Bulgarian IT infrastructure, the PMU will conduct continuous monitoring of the available options for providing of centralized Internet access in close cooperation with the SAITC and with independent experts. The PMU plans to present to the program partners for consideration a feasibility analysis - technical and financial aspects for centralized supply of Internet connectivity to target libraries.

Two of the possible options for a change in the program's approach to connectivity are visualized below:



It might be possible to sub-contract a single ISP to provide Internet to a group of libraries. However, a preliminary prerequisite for using this option is that the exact physical location of each library in the group is known in advance and that all libraries in the group are technically capable to receive Internet from the same provider. One example of this option is Internet supply through the ADSL technology – e.g. the Bulgarian Telecommunications Company is technically capable to provide ADSL Internet to any location equipped with a digital phone line. Another example of this option is Internet supply through the cable TV operators which usually provide the so-called 2-in-1 package (TV and Internet) through broadband technology. In any of these two cases, the issue of paying for the Internet will have to be solved, as the program design assumes that local authorities will be responsible for covering the Internet connectivity costs for target libraries.



A pre-requisite for this option is the existence of an Internet Management Center (equipped and staffed) for the program. Another pre-requisite is the existence of a developed connectivity infrastructure among libraries (currently unavailable).

### 3.4. Program Implementation Stages and Library Equipment Packages

The program implementation will evolve during 4.5 years: from mid-2009 to end-2013. Taking into account the readiness of library premises to host new ICT equipment and to serve ICT users<sup>24</sup> as of September 2008, the proposed schedule for incorporation of 900 target libraries in the implementation of the program per ICT equipment package is presented in the table below.

Package	Package Description	Libraries per Package	2009	2010	2011
1: District Libraries (27 in total)	10 workstations for users 5 workstations for library staff (up to 30 staff members) 10 workstations for training lab periphery equipment*	27	27	0	0
2: Chitalishte and municipal libraries in	12 workstations for users 2 workstations for library staff	57	23	34	0

<sup>24</sup> For reference see 2.2.4. Venue Selection – Geographic Distribution and Target Libraries List.

settlements with population above 5,000 people and available space for ICT equipment of at least 36 sq. m.	(from 2 to 8 staff members) periphery equipment				
3: Chitalishte libraries in settlements with population between 2,000 – 5,000 people and available space for ICT equipment of at least 24 sq. m.	7 workstations for users 1 workstations for library staff (2 library workers) periphery equipment	90	32	58	0
4: Chitalishte libraries in settlements with population between 1,000 – 2,000 people and available space for ICT equipment of at least 18 sq. m.	5 workstations for users 1 workstations for library staff (1 library worker) periphery equipment	190	73	117	0
5: Chitalishte libraries in settlements with population below 1,000 people and available space for ICT equipment of at least 12 sq. m.	3 workstations for users 1 workstations for library staff (1 library worker) periphery equipment	423	137	111	175
6: Libraries with space from 6 to 11 sq. m. (all libraries whose available space for ICT equipment is under 12 sq.m.)	2 workstations for users 1 workstations for library staff (1 library worker) periphery equipment	113	25	0	88
<b>GRAND TOTALS</b>		<b>900</b>	<b>317</b>	<b>320</b>	<b>263</b>

\*The periphery equipment consists of printers, copy machines, scanners, multimedia projectors and etc.

The number and type of the six equipment packages is tailored according to space availability and size of population in the settlement hosting the respective library. Each package includes computers, software, peripheral devices and office equipment which are needed. Space availability is calculated in line with Regulation No. 2 (5 February 2007) of the Ministry of Health: minimum 3 sq. m. per workstation.

It is important to emphasize that a settlement in itself can have a small population size while being located in a larger municipality. For instance, in Varna Administrative District - the village of Priseltsi (population: 2,500 people according to the library needs assessment; 837 people according to the National Statistical Institute) which belongs to Avren Municipality (population: 9,012 people) could be assigned to Package 6 because the library in the village has available space for ICT equipment of under 12 sq.m.

When a library is located in a settlement with a population size that corresponds to a specific package but the library itself does not have sufficient available physical space as per the package

---

requirements, it is classified in a package that corresponds to a smaller population size. Package 6 is for libraries with limited available space regardless of the settlement's population size. This is why chitalishte libraries from larger settlements can get a smaller ICT equipment package regardless of population size.

The periphery equipment, planned to be procured and installed in each library differs from package to package. For Packages 1 and 2, the periphery equipment comprises of a higher capacity printer, copy and scanner machines, and a multimedia projector, all of which will be used for training library workers. For the remaining packages - from Package 3 to Package 6 - only a basic capacity printer, copy machine and scanner will be procured for the needs of library users.

The period from 2009 to 2011 will include not just installation of ICT equipment but also activities under all other program components – training, advocacy, content, incorporation into the program in one way or another of libraries beyond the 900 list, pilot implementation of new program components through additional funding (e.g. work targeting specific population groups).

The period from 2012 to 2013 will be dedicated to:

- ✓ training;
- ✓ networking among libraries;
- ✓ capacity building for long term program development;
- ✓ introduction of new services;
- ✓ e-Content;
- ✓ public communications, advocacy and promotion of the new image of public libraries;
- ✓ expansion of the pilot initiatives;
- ✓ fundraising at the local/regional level;
- ✓ fundraising at the central level for the library network as a whole.

---

## 4. Advocacy and Communications

The following communications and advocacy activities were implemented during the planning phase (second half of 2008):

- a program logo and brochure were designed;
- an info kit and promotional materials were elaborated and distributed
- the program web portal was developed and launched;
- 28 District Coordinators were identified and participated in three meetings (May, June and December 2008) to get instructions on the planning phase activities and gain ownership on program activities at the regional level;
- consultations were carried out among the program partners regarding advocacy and communications for the country grant implementation phase.

Other activities will be implemented in the period March - May 2009, when it is expected that the country grant proposal will have been reviewed and approved by the Foundation:

- coordinate program media activities among the PR departments of the program partners;
- introduce advocacy essentials at a regular meeting for the 28 District Coordinators;
- conduct six regional events to inform key decision makers about the program;
- convene twenty-eight workshops for local authorities and chitalishte boards;
- present program at NAMRB's annual meeting;
- identify national and regional media to publish articles on the program;
- organize a press-conference with participation of the Program Board members;
- disseminate information on the program in the print and electronic media.

The envisaged advocacy and communications strategy for the program will brand public libraries as information access points committed to the needs of communities. ICT-enabled libraries shall be regarded not only as book storage facilities but also as centers for knowledge management, training and partnerships for development.

### 4.1. Objectives and Target Groups of the Advocacy and Communications Strategy

The following objectives for advocacy and communications have been identified:

1. Ensure central government support, including cost-share commitments and post-grant evolution;
2. Attract local authorities as strategic partners to public libraries;
3. Design and implement fundraising campaigns to get additional support to the program;
4. Inform, motivate and involve library workers as pro-active program ambassadors;
5. Share information on results, challenges, benefits and opportunities among target groups;
6. Establish and effective cooperation with national and regional media;
7. Help mitigate potential or actual risks facing the program.

The following target groups for advocacy and communications have been identified:

- general population (adults);

- local communities (school children, students, pensioners, disadvantaged groups, entrepreneurs);
- municipal, district and central authorities;
- the community of library workers;
- third sector entities and local business;
- national and regional media.

#### 4.2. Key Advocacy/Communications Issues and Key Partners for Addressing Them

Issues	Key Partners
1. Facilitate program partners and stakeholders in gaining ownership on the program – become conscious of their responsibilities, as well as of the benefits the program will produce for them	individuals/organizations forming the Public Council organizations forming the Program Board municipal authorities chitalishte boards District Coordinators the community of library workers local communities and library users
2. Gain public trust for the program	regional and national media, including key journalists third sector organizations working in a similar field
3. Attract additional funding to support the program long-term and ensure sustainability of results	private business media municipal authorities chitalishte boards local third-sector organizations
4. Attract more visitors to public libraries	target libraries
5. Raise the image of the library worker	workers at target libraries
6. Help public libraries regain their importance in society	workers at target libraries municipal authorities
7. Sensitize the population at large to discuss in the public space the potential or actual risks facing the program's implementation and sustainability	media individuals/organizations forming the Public Council

#### 4.3. Stages of the Communications and Advocacy Strategy

Preliminary stage: February 2009 – September 2009

- providing basic information on the program to all target groups and stakeholders; target libraries not yet on board, as the first four months of program implementation (June-September 2009) will focus on initial target libraries selection and procurement of equipment;

Information dissemination stage: October 2009 – December 2011

- 
- unfolding the full potential of communications and advocacy; target libraries are brought on board the program in three waves;

Reinforcing stage: January 2012-December 2013

- solidifying the image of Bulgarian libraries as community information centers; all target libraries are on board the program.

#### **4.4. Groups of Communications and Advocacy Activities**

*Regular communication between and among the PMU, the Program Board and the Public Council*

Already during the planning phase, the PMU strived to establish a fluent and constructive interaction with and among program board members. Over time, this interaction has increased and expanded, ranging from informal daily consultations to formal events such as working group or program board meetings. A Public Council<sup>25</sup> was not formed during the planning phase. The program partners consider that such a panel should be established after the general elections in June 2009.

*Intense and regular liaison with municipal authorities (mayors and municipal councils)*

The National Association of Municipalities in the Republic of Bulgaria (NAMRB) is a key program partner and board member, who will have an increasingly more important role in 2009 and onwards. Once the country grant proposal is approved by the Foundation, the communication channels and public events of the NAMRB (e.g. the organization's annual meeting) will be systematically used to advance the commitment of municipal authorities to the program at the local level. The benefits from the program, as well as the respective responsibilities of the municipal authorities long-term, will be clarified, debated and promoted.

*Partnering with association of the Bulgarian chitalishte*

There are several organizations of chitalishte registered as non-profit entities. The oldest supported by the state, is the Union of the Bulgarian Chitalishte and there are formal or informal bodies – such as the Chitalishte Development Network/the Chitalishte Development Foundation, the Agora platform<sup>26</sup>, the Association of Chitalishte in the Sliven Municipality and the Association of Chitalishte in Sofia and other national and regional chitalishte associations. Such organizations will be attracted as program partners. The program will cooperate with all actively functioning chitalishte organizations to encourage a proactive involvement of chitalishte boards in public library development.

*Awareness-raising among librarians and daily liaison with the District Coordinators*

---

<sup>25</sup> The composition and objectives of the Public Council are presented in Section 5.2.

<sup>26</sup> The Agora platform was established in June 2008 by three autonomous organizations: the Association for Development – South, the City of Pleven Public Fund “Chitalishte” and the Contemporary Chitalishte Association. In 2008, the platform attracted funding from the Charles Stewart Mott Foundation for capacity building and civil society development.

---

A professional community that supports and owns the program is a key building block of the advocacy strategy. Inspired and devoted librarians will naturally become the best ambassadors of the key message: every local community needs a strong library, serving as an information and community center, because access to information and communications can considerably improve people's lives.

The PMU will maintain bilateral daily communication with the program's 28 District Coordinators via email, telephone and the program portal. The three Field Coordinators at the PMU will follow regular field visit plans to maintain an eye-to-eye relationship with target librarians and local partners.

#### *Program info kit*

A set of attractive print and electronic materials to share basic and specific information on the program and its progress will be designed, printed in sufficient volumes and re-printed as necessary.

#### *Program portal*

Designed and launched during the planning phase (November 2009), the program web portal – [www.glbulgaria.bg](http://www.glbulgaria.bg) - serves already as a public communication tool, as well as a management tool used by the program partners. Giving the opportunity to librarians to express themselves is another important awareness-raising aspect that will be addressed through the portal. Regular publication of articles in the portal by journalists, who are strategic partners to the program will be ensured.

#### *Building on existing advocacy practices*

The program will help expand and enrich existing campaigns, such as the annual National Library Week of the Bulgarian Library and Information Association, the national Reading Bulgaria Initiative and the Give a Book campaign.

#### *Public information campaign*

Drawing people's attention to the potential of public libraries as community information centers will be a regular activity, which will be entrusted to target librarians, District Coordinators and the PMU's PR Specialist. Public communication channels will include TV, radio and press media, as well as billboard advertising. The communication campaign will use local and national opinion leaders, as well as librarians as advocates in the different types of events and publicity actions.

Regularly informing the target audiences at central and local level about the progress and achievements of the program, as well as the challenges facing its implementation, will be a key communication principle. The findings of the impact assessment will be used to shape and tailor the information. The regular announcement of even smaller achievements and successful stories will considerably foster social trust and will steadily increase public awareness for the new possibilities offered by public libraries. Special TV, radio, newspaper coverage and print materials focused on successful program stories will be developed.

#### *Diversifying target groups according to the specific local context*

---

The PMU's Advocacy and PR Specialists will work with target libraries to identify concrete initiatives at the local level for specific target groups:

➤ families - children and parents

New outreach strategies to attract families with children as library visitors. Activities promoting family visits will be developed. For example, "library afternoons", dedicated to familiarize in a playful way children and their family members with exciting new possibilities offered by the library.

➤ students and lifelong learners

School children are among the regular visitors of public libraries. However, an entirely new approach towards young people and adult learners is needed in order to attract them as active users of the ICT possibilities to be offered by libraries. The communications campaign will continuously highlight successful partnerships established by libraries with local education and training providers.

➤ users with special needs and new audiences

The program will explore a large variety of ways to reach new audiences (ethnic minorities, people with disabilities, unemployed, entrepreneurs), especially those experiencing difficulties finding information about healthcare, education, job opportunities, business development. Targeted advertising will be used to respond to the profile of each group. Librarians will be assisted by the PMU and District Coordinators to organize clubs, exploring the vast potential of Internet and ICT. It is expected that this will help attract organizations and individuals that will act as efficient program advocates in the community.

*Local workshops*

Librarians will also be assisted to participate and gradually take a lead in joint activities with local museums, schools, training providers and other entities, so as to promote local cultural and historic heritage and to create local e-content. Media coverage of the workshops will always be sought.

*Events aimed at dissemination of good practices*

Workshops and travelling seminars will be organized regularly throughout the country to present best practices achieved by target libraries with support of the program.

*Cooperation with regional and national media*

Establishing and maintaining strategic partnerships with regional and national media will be another important element of the communications and advocacy work. Partnerships with the Bulgarian National Radio and TVs with national coverage will help disseminate information on the program process and impact. The program web portal will cooperate with the Bulgarian news and social portals.

The PMU will identify in the first half of 2009 several journalists at the central and regional level, who will act as strategic partners. They will be invited to visit program sites and events, and the PMU's Advocacy and PR Specialists will maintain close contact with them.

---

In addition, the revitalized library image will be promoted on radio and TV by librarians. It is expected that the program will motivate librarians to assume a more prominent role in their communities on the basis of a growing professional self-esteem. Participation of the program stakeholders (members of the Program Public Council and/or the Program Board, librarians, District Coordinators, PMU members and library users) in prime time TV entertainment shows will be sought.

#### *Involving the business community in supporting the program*

Involving the private sector in sustaining the program by emphasizing its possible contribution to the growth of society and the corporate social responsibility of companies is expected to eventually lead to fundraising for target libraries at the local level.

#### *Encouraging volunteerism*

Regular assistance will be given to librarians so that they could develop an outreach strategy for attracting and motivating volunteers. Targeted publicity campaigns, organized in partnership with local media, will promote voluntary work in libraries. Donating time and knowledge to a local library will be presented as a unique opportunity for making an invaluable contribution to a good cause, while acquiring new skills and competences. Special attention will be paid to encourage volunteers and keep them interested, because strongly involved volunteers will become natural and incredibly convincing advocates for the program and will attract new audiences to the library. Stories of successful volunteers will be collected and disseminated through diverse media channels. Giving volunteers the possibility to present to the broader public their personal motivation for volunteering in libraries will add a more personal feeling to the communication campaign.

#### *Regular discussions on potential risks involving the Public Council and the Program Board expert-level members*

The Program Management Committee (PMC) and the Program Board (PB) <sup>27</sup> will monitor the program implementation through careful analysis of the progress reports prepared by the Program Manager. The identified risks to program implementation/sustainability will be proposed for discussion among (selected) members of the Public Council and the expert-level of the Program Board. Ad-hoc focus groups to verify the identified risks and/or proposed solutions will be organized by the PMU and results will be communicated to the PMC and PB. The focus groups will comprise program beneficiaries/stakeholders from the central, regional and local levels such as for instance, chitalishte board members, municipal councilors, district coordinators, target librarians, etc.

#### *Encouraging citizen action for program advocacy*

The program team and the 28 district coordinators will promote grass-root pro-activeness aimed at advocacy for the program at the local level. It is expected that target librarians will identify like-minded supporters from their communities and will advocate for the program vis-à-vis the local authorities. The training program for librarians will include a module on program advocacy.

---

<sup>27</sup> See details on the Program Management Committee and on the Program Board in sub-sections 5.2, 5.5 and 5.6.

## 5. Organizational Capacity and Management Plan

### 5.1. Program Partners

The Ministry of Culture will be the lead organization (executing agency in UNDP terminology) for the country grant, responsible for achieving the country grant objectives.

The United Nations Development Program will act as fiscal agent (implementing agency in UNDP terminology) for the country grant, providing to the Ministry of Culture technical assistance and general management services. UNDP will be responsible for the administrative management of the program and for the financial management of the country grant funds.

The other official program partners will be the:

State Agency for Information Technology and Communications;  
Bulgarian Library and Information Association;  
National Association of Municipalities in the Republic of Bulgaria.

### 5.2. Program Management Levels and Reporting Lines

A three-layer program management structure is envisaged: implementation level (Program Management Unit), oversight level (Program Management Committee), and strategic level (Program Board). See the Program Management Structure provided below.

At the implementation level, a Program Manager (PM) will be directly responsible for the daily program operations, to be undertaken and/or coordinated by a Program Management Unit (PMU). The PMU will be staffed with 20 full-timers for the entire duration of the country grant<sup>28</sup>. The PM will head the PMU, reporting to the National Program Director (NPD) at the Ministry of Culture and to the UNDP Program Officer (PO).

At the oversight level, the NPD and the PO will form a Program Management Committee (PMC). The PMC will backstop the program operations by closely following the work of the PMU on a continuous basis. The MC will designate one of its staff members to act as NPD. The NPD will report to the Minister. UNDP will designate a PO to backstop the program implementation, sitting on the PMC.

At the highest management level, the MC, UNDP, SAITC, BLIA and NAMRB will form a Program Board (PB). The PB will provide overall guidance and will take strategic decisions on the program. A Working Group (WG) composed of representatives of the PB members will act as the expert-level tier of the PB. The WG will convene as needed to conduct inter-partner consultations on key program deliverables and to ensure the respective relevant degree of involvement of the PB members. The PM and/or the PMC will ensure that strategic management actions (PB proceedings) are based on preliminary expert-level consultations among the official program partners through the WG mechanism.

The program will also have a Public Council (PC). While not exercising a program management function, the PC will serve as a forum for public personalities, who are not formal program

---

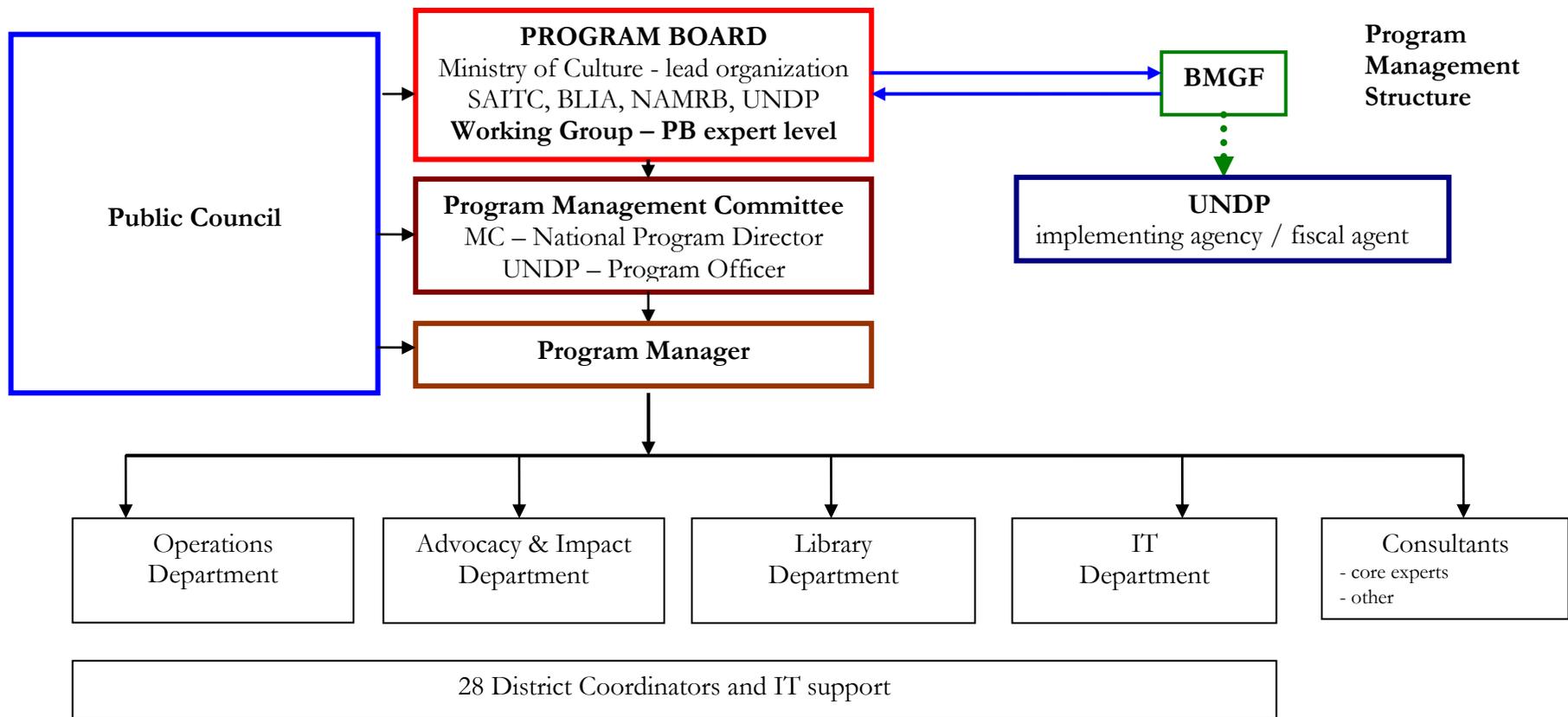
<sup>28</sup> See PMU details in sub-section 5.3. below.

---

partners, to provide advice, guidance, opinions, support and relationship building opportunities to the program partners. The PC will bring together personalities who have declared and legitimized their interest in the program's undertakings and will represent an opportunity for program stakeholders to express their opinions/concerns. The PC will contribute to the program's advocacy efforts by virtue of its composition. The PC will include prominent figures from Bulgaria's society, key journalists, academia representatives and influential third-sector representatives. The composition of the PC will be flexible over time. Efforts will be made to attract into the PC ambassadors, cultural attaches and managing staff of foreign institutes, such as the British Council, Goethe Institut, Instituto Cervantes, Institut Français, US Embassy Information Resource Center in Sofia.

The terms of reference and initial composition of the PC will be designed by the program partners during the first six months of the implementation phase.

The PC will convene twice per year in an expanded meeting with Program Board members and the PMU. The Program Board, the Program Management Committee and the PMU will liaise on an ad-hoc basis with the members of the PC as needed.



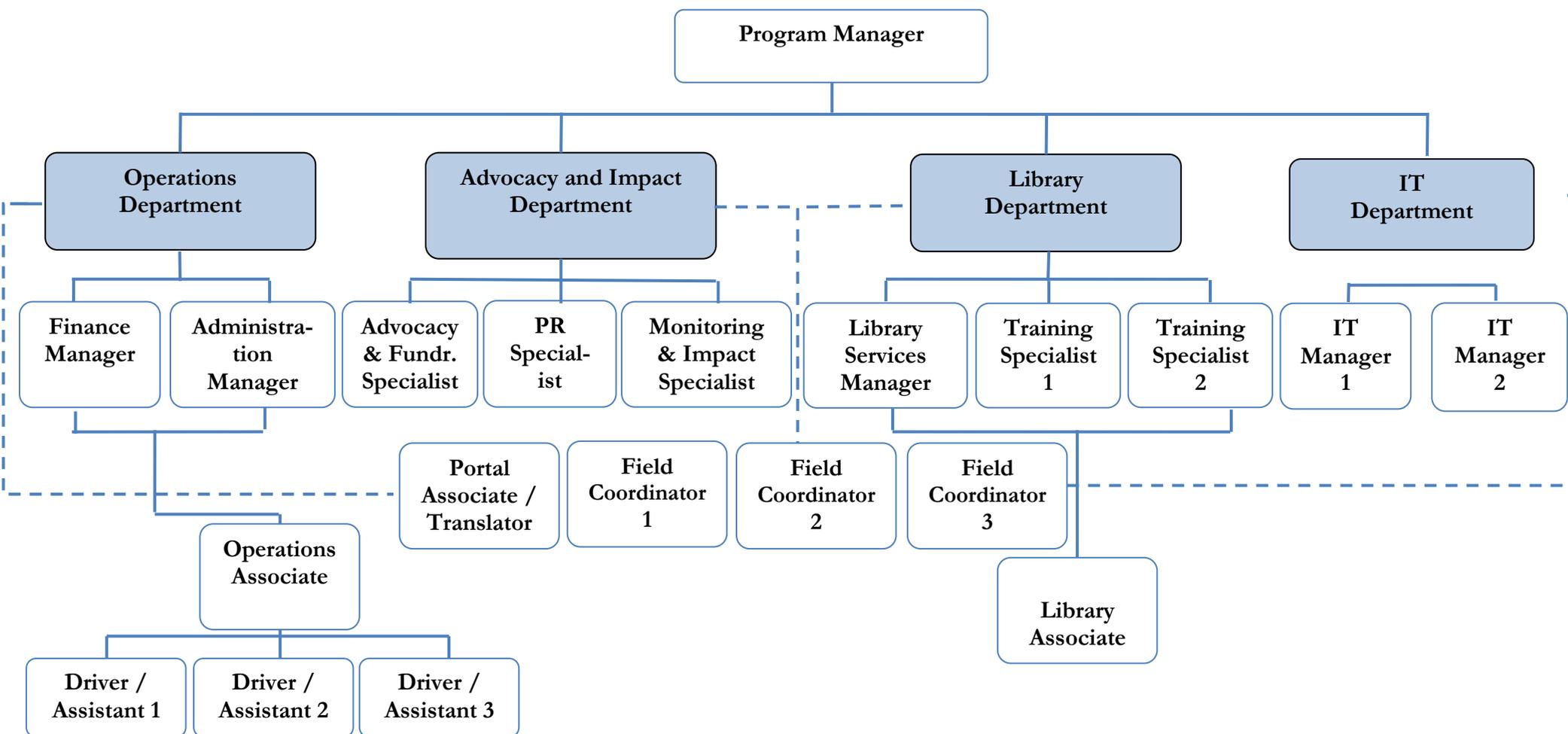
**BMGF (Bill and Melinda Gates Foundation):**  
**Program Board:**  
**Working Group (Program Board expert level):**  
**Program Management Committee:**  
**MC (Ministry of Culture):**  
**UNDP (United Nations Development Program):**

grant provider  
 strategic oversight  
 overall coordination of activities  
 administrative and financial management  
 lead organization / executing agency  
 fiscal agent / implementing agency

**Program Manager:**  
**28 District Libraries:**

head of the Program Management Unit (PMU)  
 coordination, implementation and resource units -  
 district level

### Structure of the Program Management Unit (PMU)



The dotted line means that the Portal Associate/Translator and the three Field Coordinators interact horizontally with the four departments of the PMU.

### 5.3. Composition and Competencies of the Program Management Unit (PMU)

The structure of the PMU is provided in the organigram above.

The PMU will be headed by a Program Manager and will have 20 full-time members distributed in four departments. The PMU will have four departments comprised of the following positions:

- Operations Department - a Finance Manager, an Administration Manager, an Operations Associate, and three Driver/Assistants;
- Advocacy and Impact Department – an Advocacy & Fundraising Specialist, a PR Specialist, and a Monitoring & Impact Specialist;
- Library Department - a Library Services Manager, two Training Specialists, and a Library Associate;
- IT Department - two IT Managers.

There will also be three Field Coordinators and a Portal Associate/Translator at the PMU. They will interact closely with all four departments.

PMU salary costs will be covered by the country grant for the entire duration of the implementation phase. The envisaged three-stage implementation roll-out (as detailed in subsection 3.4. above) calls for a fully-fledged PMU for at least three years for all target libraries. The assumption here is that the last (third) group of target libraries will join the program in 2011, thus requiring PMU support until the end of 2013. Another assumption behind the planned PMU staffing level of 20 people is that the procurement of ICT equipment and the base training component are just the foundation of the program. Targeted activities for local content development, increased population outreach, innovations in library service provision, training, communication and advocacy, as well as steps towards sustainability of the investment will need to build on this foundation. As the program partners plan to come up with a post-grant sustainability strategy for the program within two years from its start, it can be expected that part of the PMU functions/positions could transform/be handed over to the (yet unidentified) structure that the program partners would entrust with long-term program management and with the program's expansion. In such a case, the budget provision for PMU salaries will need to be transformed into another budget category.

All of the above requires an initial planning for a fully staffed PMU for the entire duration of the country grant.

As head of the PMU, the PM will be responsible for effective, cost-efficient and timely implementation of the program activities in line with the approved country grant work plans and budget. The PM will manage the PMU staff and the 28 District Coordinators, and will assume overall responsibility for coordinating the work of external consultants and sub-contractors.

The PMU will:

- draft terms of reference and technical specifications;
- identify potential program consultants and sub-contractors;
- coordinate the work of program consultants and sub-contractors
- provide expert inputs and supervision of consultant/sub-contractor assignments;
- finalize the outputs of external assignments as per program partner comments;
- prepare program procurement actions and payment requests;

- ensure program record-keeping;
- draft program reports;
- organize program events, duty travel, seminars, and public outreach activities;
- liaise at the expert level with program partners;
- coordinate, guide and mentor the work of the 28 District Coordinators.

#### **5.4. District Coordinators**

The “extended arm” of the PMU will be the 28 District Coordinators (DCs) – paid staff of the district libraries. The DCs will act as the regional tier of program implementation. There will be one DC for each of Bulgaria’s 28 administrative districts. The capacity of district library staff to act as DCs will be built gradually with PMU support. The DCs will be paid from the country grant budget during the entire period of program implementation on an output basis, for their work under the program.

While acting as DCs, district library staff will develop their capacities to provide state-of-the-art methodological support and to act as resource persons for staff of smaller libraries in their respective district. It is expected that in the post-grant period, the positive change induced by the program will have prompted Bulgaria’s citizens to advocate for a more distinct recognition by policy-makers of the importance and role of public libraries and the need for systematic, well-funded methodological support through the district libraries. Thus, it is assumed that the DCs functions in the post-grant period will be covered financially from national resources.

The DCs will liaise with the PMU members as needed, but each DC will report to a specific Field Coordinator.

The DCs will:

- act as coordinators and focal points for the program for their respective administrative district;
- participate in the elaboration of the target libraries list;
- organize program-related activities at the regional level under all program components;
- communicate with local libraries, as instructed by the PMU;
- liaise with local and regional level stakeholders in order to advance the program objectives and to ensure smooth program implementation;
- act as resource persons and mentors for the local library workers;
- participate in regular coordination meetings with the PMU members;
- effect field visits to target libraries, effecting monitoring and trouble-shooting activities;
- report on a regular basis to their assigned Field Coordinator, advising about the progress of program implementation, as well as about opportunities and challenges at the regional and local level.

It is envisaged that district libraries through the District Coordinators will conduct program events for target libraries in their respective district such as: coordination and management meetings; information sharing seminars, etc.

#### **5.5. Competencies of the Program Management Committee (PMC)**

The PMC will:

- interview applicants to the new or unoccupied PMU positions, together with the Project Manager;
- backstop the work of the PM and assess his/her performance;
- give clearance for terms of reference and specifications submitted by the PM;
- participate in evaluation committees and/or give clearance for selection of program consultants / sub-contractors, proposed by the PM;
- give clearance for the detailed program work plans submitted by the PM;
- give clearance for public events, and Working Group meetings;
- give final clearance for the deliverables of consultants and sub-contractors, as needed;
- decide on the necessity for partner (WG) inputs to interim and final deliverables;
- conduct expert-level consultations through the WG mechanism and liaise as needed with members of the program's Public Council, in order to prepare the Program Board proceedings.

The PMC will convene as frequently if needed. Routine PMC clearances for actions motioned by the PM will be given via e-mail. The responsibility for requesting and filing PMC clearances will rest with the PM.

### **5.6. Composition and Competencies of the Program Board (PB)**

The PB will consist of the following officials, or authorized representatives, of the program partners:

- Minister / Deputy Minister of Culture – Chairperson;
- UNDP Resident Representative;
- Chairperson of the SAITC;
- Chairperson of the BLIA;
- Executive Director of the NAMRB.

The PB will be entitled to expand/reduce its composition, subject to a unanimous decision.

The level of representation of the key partner institutions at the PB will depend on the agenda for the respective PB meeting. At each partner's discretion, experts will be expected to participate when technical issues are discussed and senior management will be expected to participate, or agree subsequently in writing, when key deliverables are being cleared.

The PM will act as Secretary to the PB. The PB proceedings will be preceded by PMC consultations and expert-level interaction among the key program partners.

The PB will convene on at least once per year to review the progress of program activities and take strategic decisions related to the achievement of the country grant objectives. The PB will convene on an ad-hoc basis to discuss/approve key program deliverables, as needed.

### **5.7. Role of UNDP as a Fiscal Agent**

UNDP will provide technical assistance and overall management support to the program, and will act as fiscal agent (implementing agency in the UNDP terminology).

UNDP will provide to the Ministry of Culture the following types of support services for the implementation of the country grant:

- recruitment of program personnel and consultants;
- procurement of goods and services;
- disbursements from the country grant;
- financial management and accountability;
- support to program advocacy;
- supervision of the PMU for accountability, transparency, effectiveness and efficiency;
- monitoring of programs funds and expenditures in accordance with the approved budget;
- monitoring of the program activities.

The responsibility for daily financial management of the program will be shared between the PMU (Program Manager and Finance Manager) and UNDP Bulgaria (Programme Operations Unit and Finance Unit). The PMU will prepare the supporting documents for payments and payment requests, while UNDP will effect the payments, record them in its corporate Atlas ERP system and ensure proper record-keeping.

The UNDP Bulgaria Program Strategy Unit and the UNDP Bulgaria Program Operations Unit will provide technical advice to the PM in relation to the program implementation

## Sustainability

The responsibilities for Bulgaria's public libraries network are shared among different entities: the Ministry of Culture, the district libraries, the individual chitalishte, the municipal authorities. There is no specific legislation on public libraries in Bulgaria and there are no contemporary standards for library performance. Thus, the issue of long-term steering of any initiative implemented with donor funding cannot be addressed through a simple straightforward solution.

On the one hand, this points to the conclusion that each individual library has to pursue its own way to modernization depending on the specifics of the local context (good working relationships with the municipal council, mayor, chitalishte board, the private sector). On the other hand, it is hoped that the Global Libraries Bulgaria Program will be catalytic for mobilizing local and central government understanding for and support to libraries in the country. For instance, the provision of structured and systematic methodological support and training services for chitalishte libraries could be formally entrusted to a specific organization/entity subject to agreement by the program partners. It is believed that through successful advocacy for the role of public libraries based on positive results to be achieved by the program, the relevant stakeholders will consolidate a common approach to the development of a state-of-the-art public libraries network.

### 6.1. Strategy for Long-term Sustainability of the Program

The program partners have agreed that already in the first year of implementation they will initiate an analysis of the available options for institutional capacity building aimed at post-grant evolution of the program in all its aspects:

- ICT equipment;
- training and methodological support;
- library services and e-content;

- networking;
- partnerships, advocacy and fund-raising.

All possible options for sustaining the program results at the central level will be assessed and compared, including but not limited to:

- government management of the program;
- creation of a new non-governmental organization (NGO);
- entrusting the management of the program to an existing NGO;
- a new public-private partnership;
- other.

Both district libraries, as coordinating and methodological support entities for the other libraries, as well as the professional associations of library workers (e.g. BLIA) and chitalishte associations (e.g. the Union of Bulgarian Chitalishte) will be important actors in the long-term sustainability of the program. In the course of its implementation, the program will have the objective to enable joint actions of stakeholders in Bulgaria on the basis of the achieved program results.

The 27 district libraries should be capacitated to coordinate the implementation phase in their respective administrative districts (28 in total), serving as the regional-level tier of the program management. It is important that all these 27 libraries start their participation in the program in 2009 and also that their capacity as training hubs is built as early as possible. In addition, the program will also support District Libraries to enhance their capabilities as resource centers for chitalishte and municipal libraries.

The country grant budget envisages an allocation for institutional capacity development in line with the option to be selected. The PMU and UNDP will participate actively in conducting the strategy design and implementation process, in close consultation with the Program Board and the Public Council.

## **6.2. Advocacy and Communication Activities Targeting Sustainability**

As pointed out in Section IV., the program's advocacy and communications activities will aim to ensure central government support in terms of cost-share commitments and post-grant evolution, and to attract local authorities as strategic partners to public libraries.

## **6.3. BMGF Grant and Cost-sharing Commitments**

The program approach rests on the assumption that the costs for the implementation phase are shared among the Foundation, the Ministry of Culture and the local authorities in the program locations.

The Ministry of Culture will finance the required additional librarian positions at the target chitalishte libraries during the grant and post-grant period. It is assumed that 600 positions will be needed, based on the library needs assessment results. As in the case of any public library worker position, newly-hired librarians in the chitalishte will be selected on a competitive basis by the respective chitalishte board in conformity with the current professional standards. The program team, BLIA and respective district library will provide support in the selection process as needed. Shortage of candidates for the new librarians' positions is not expected, but it is expected that there will be a shortage of candidates with librarian qualifications/background at

the time of the new hires. The new hires will be expected to subsequently obtain the required professional qualification. The program's training component envisages to provide basic training in library management and library services skills, which will be tailored to the needs of such newly-hired library staff already as of the beginning of their appointment.

In the post-grant period, the assumption is that program costs shall be borne by Bulgaria, or shall be secured through project-funding.

#### **6.4. Sustainability Cornerstones for the Program in Bulgaria**

##### *More posts for librarians at the chitalishte*

The program will trigger the Ministry of Culture to fund more librarian posts in the long run and will stimulate the continued professional qualification of librarians.

##### *Librarians able to effect local-level advocacy for their library*

The program's training component will include the development of skills among librarians to organize citizen action in favor of the local library and to attract the attention of the local authorities.

##### *Librarians able to apply strategic planning and effective library management*

The program's training component will include the development of skills among librarians to think strategically with regard to the development of their libraries, to fundraise and to position the library among the important local players.

##### *The program will create a steady and growing demand among the general population to use the Internet and state-of-the-art ICT*

Target communities will experience a rising public need to use Internet and ICT as a result from the program. This public demand will force local authorities and chitalishte boards to prioritize and maintain the ICT equipment and Internet access long-term. Better informed citizens will be in a position to require in an effective way from local authorities that community needs are met.

##### *Establishing a pool of trainers, community of trainees and training infrastructure*

The program's comprehensive training component will address both the aspect of human capital (trainers and librarians to be trained) and the physical infrastructure enabling the provision of training for librarians and for users at the 27 district libraries and the 50+ bigger chitalishte /municipal libraries that will also act as training hubs. In the post-grant period, the human capacity and the physical assets will remain available, and it will be a matter of identifying the most appropriate funding patterns for continuing the effort for structured life-long training of librarians initiated by the program.

##### *Involving the professional associations of librarians, the associations of the chitalishte and the library schools in the program's cause long-term*

The program partners will strive to attract a wide circle of formal and informal supporters at the central and regional level, both with regard to the monitoring and steering of the program and with regard to its implementation. This will broaden the platform of institutions interested to promote the program objectives and will raise the chances for additional fund-raising ensuring program viability in the long run.

##### *Involving the third sector in the program*

As part of the program's advocacy efforts at the local level, target librarians will be encouraged

to seek and establish partnerships with local representatives of the non-profit sector. These partnerships are expected to be mutually beneficial, especially because public libraries can be used not only by individuals but by groups of citizens as well.

*Inter-agency cooperation at the central level*

The program in Bulgaria, already during its planning phase, has demonstrated the big potential of inter-agency cooperation: four different Bulgarian institutions (the Ministry of Culture, the State Agency for ICT, the Bulgarian Library and Information Association and the National Association of Municipalities) have effectively joined forces to design and then to implement the planned activities. Such cooperation can lead to a qualitative change in the development and functioning of Bulgaria's public libraries network in the period 2014-2020.

*Accumulating, interpreting and using data on Bulgaria's public library system and the services it provides*

The library needs assessments, the reports of target libraries, the program's impact assessment and evaluations, and the various focus groups to be conducted during implementation will all contribute to analyzing and documenting the role of Bulgaria's libraries in public service provision. This will facilitate the further evolvement of the national and local policies vis-à-vis public libraries by providing a reliable planning tool to central and local-level policy makers.

## **7. Impact Planning and Assessment; Monitoring and Internal Evaluation; External Evaluation**

The process of Bulgaria's Impact Planning and Assessment Framework (IPAF) formulation span from June to October 2008, involving independent national experts, international consultants identified with foundation support, and all program partners. The Project Board – Expert Level (Working Group) convened three times during the aforementioned period to discuss the various consecutive IPAF drafts. The IPAF presented hereinafter was developed in a sequence of consultations among the program partners and the consultants. The program proposers are aware that the foundation is willing to further discuss and fine-tune Bulgaria's IPAF, in order to make it more specific and more focused on users, as well to streamline the set of proposed impact indicators. Additional support from the foundation in this regard is expected over the course of the first year of the program. The IPAF below shall be treated as work in progress.

### **7.1. Impact Assessment Objectives**

The successful implementation of the program needs a system for ongoing assessment of progress and results, and for monitoring the identified success indicators. The objectives of the assessment will be to:

- Follow the overall progress of program activities against agreed workplans and targets;
- Early warn about potential threats and identify new opportunities;
- Suggest corrective actions;
- Adapt the program parameters, including desired outcomes;
- Formulate new/revised indicators and possible new outcomes
- Plan for short-term and long-term sustainability of the program results;
- Quantify and qualify the impact of the program interventions.

### **7.2. Impact Planning Rationale**

In order to design the program's Impact Planning and Assessment Framework (IPAF), an analysis of the key Bulgarian and EU strategic planning documents was performed to identify the desired areas of impact. In parallel, the four "Global Libraries – Bulgaria" program objectives were formulated on the basis of the strategic goal agreed among the partners previously and in line with the desired areas of impact.

The program outputs, outcomes, objectives and desired impact were designed in the view of:

- relevance to the strategic goal of the program – enable Bulgarian citizens to integrate in the global information society, improve their quality of life and enhance civil society development;
- alignment with the expected type and scope of support from the Foundation;
- relevance to national priorities (including those deriving from Bulgaria's membership in the EU);

- availability of public funds to complement the grant from the Foundation.

The IPAF table below envisages two levels of indicators – output indicators and outcome indicators. The assumption is that the achievement of the outcomes under each of the four program objectives will contribute to reaching the desired impact. At least one indicator is foreseen for each outcome or output. Some of the outputs are indicators per se.

The IPAF structure mirrors the structure used for designing the program’s activities, outputs, outcomes and objectives framework (as per table in Section 2 of the proposal). This is why Objective 1, which is operational and not substantive, is also included in the IPAF, regardless of the fact that its achievement will not produce impact per se.

### Impact Planning and Assessment Framework (IPAF)

OBJECTIVE	1. EFFICIENT AND EFFECTIVE PROGRAM MANAGEMENT, DEVELOPMENT AND SUSTAINABILITY	INDICATORS	METHODS OF ASSESSMENT / VERIFICATION
<b>IMPACT</b>	As this objective is operational, the issue of impact is not relevant.		
<b>OUTCOME</b>	The achievement of this objective will ensure that the desired outcomes under the other three objectives are attained.		
<b>OUTPUTS</b>	<p>4. Operational framework ensuring effective country grant implementation is in place</p> <p>5. Improved program implementation based on monitoring and evaluation</p> <p>6. Institutional capacity ensuring post-grant development and sustainability of results is in place</p>	<p>staff hired on time</p> <p>reports and budgets completed on time</p> <p>program monitored and evaluated (incl. impact assessment) in a way that ensures adaptive management during the grant period</p> <p>program activities implemented as per workplans</p> <p>sustainability strategy designed by 2010 and in implementation from 2011</p>	<p>quarterly and annual reports</p> <p>minutes of meetings (Program Board, Working Group, Program Management Committee, Public Council)</p> <p>mid-term external evaluation report</p> <p>final external evaluation report</p> <p>sustainability strategy document</p>

OBJECTIVE	2. STIMULATION OF COMMUNITY DEVELOPMENT	INDICATORS	METHODS OF ASSESSMENT / VERIFICATION
<b>IMPACT</b>	LIBRARIES CONTRIBUTE TO COMMUNITY DEVELOPMENT		
<b>OUTCOMES</b>	<ol style="list-style-type: none"> <li>1. The library is a space for local community life and equitable community development</li> <li>2. Libraries regain public trust as important community and information centers</li> <li>3. Volunteers contribute to library activities – the value of giving to the community is promoted</li> <li>4. Library partners develop appreciation for library services and act as library advocates</li> </ol>	<p>positive trend of perceptions of / commitment to the library in the community</p> <p>growing number of vulnerable people serviced by the library</p> <p>growing number of library users</p> <p>growing user satisfaction with library services / activities</p> <p>growing number of library activities / events / programs</p> <p>local in-cash or in-kind contributions to support libraries</p>	<p>questionnaires to librarians, users and local stakeholders</p> <p>focus groups and individual interviews</p> <p>success stories / thank you letters submitted by librarians, users and local stakeholders</p> <p>library statistics and annual reports</p> <p>quarterly and annual reports</p>
<b>OUTPUTS</b>	<ol style="list-style-type: none"> <li>1. Community programs and events organized by the libraries using ICT</li> <li>2. Campaigns/programmes/activities run by the library for vulnerable groups using ICT</li> <li>7. Chitalishte boards and local</li> </ol>	<p>number of community programs / activities / events organized</p> <p>number of people participating in the programs / activities / events</p> <p>number of libraries included in chitalishte board plans</p>	<p>special statistical forms filled in by librarians</p> <p>chitalishte board plans for library development implemented – as reported by librarians</p> <p>success stories</p>

<b>OBJECTIVE</b>	<b>2. STIMULATION OF COMMUNITY DEVELOPMENT</b>	<b>INDICATORS</b>	<b>METHODS OF ASSESSMENT / VERIFICATION</b>
	<p>stakeholders involved in the planning and implementation of library activities</p> <p>8. New partnerships of community value in place</p>	number of instances of partnership	

<b>OBJECTIVE</b>	<b>3. ENHANCEMENT OF THE QUALITY OF HUMAN CAPITAL</b>	<b>INDICATORS</b>	<b>METHODS / SOURCES OF ASSESSMENT</b>
<b>IMPACT</b>	KNOWLEDGE AND SKILLS AMONG LIBRARY USERS AND LIBRARY WORKERS ARE ENHANCED CONTINUOUSLY		
<b>OUTCOMES</b>	<ol style="list-style-type: none"> <li>1. Increased competence and confidence of library workers and users to develop themselves</li> <li>2. Members of the community are able to use ICT independently to meet their needs</li> <li>3. Members of the community have enhanced opportunities for education and training in libraries</li> <li>4. Libraries are more responsive to</li> </ol>	<p>new competences and skills acquired by library workers and library users</p> <p>higher spread of independent use of ICT among library users</p> <p>growing number and type of programs, services and tools (training courses, information tools, resources, etc) for education and training in the library</p>	<p>questionnaires to librarians, users and local stakeholders</p> <p>focus groups and individual interviews</p> <p>special statistical forms filled by librarians</p> <p>training component records</p>

OBJECTIVE	3. ENHANCEMENT OF THE QUALITY OF HUMAN CAPITAL	INDICATORS	METHODS / SOURCES OF ASSESSMENT
	the education and training needs of their communities		
<b>OUTPUTS</b>	<ol style="list-style-type: none"> <li>1. Library workers trained in ICT, e-information resources, advocacy, fundraising, service delivery and project cycle management</li> <li>2. Growing number of people trained / consulted to use ICT and electronic information resources</li> <li>3. A range of specific services and resources in place to support the education, training and development of library users</li> <li>4. Improved collaboration between libraries and institutions offering educational and training services (schools, vocational training centers, academic and research bodies)</li> </ol>	<p>number of library workers trained</p> <p>number of library users trained / consulted</p> <p>number of instances of collaboration</p> <p>growing user satisfaction with library services / activities</p>	<p>PMU records</p> <p>special statistical forms filled by librarians</p> <p>questionnaires to librarians, users and local stakeholders</p> <p>focus groups and individual interviews</p> <p>success stories</p>

OBJECTIVE	4. ACCELERATED INTEGRATION INTO THE INFORMATION SOCIETY	INDICATORS	METHODS OF ASSESSMENT / VERIFICATION
<b>IMPACT</b>	THE PROGRAM CONTRIBUTES TO BRIDGING DIGITAL DIVIDES		
<b>OUTCOMES</b>	<ol style="list-style-type: none"> <li>1. Information literacy promoted in the communities</li> <li>2. People overcome communication gaps arising from physical distances</li> <li>3. Improved solutions to individual and community issues, including decision- making achieved through ICT</li> <li>4. A new culture of information sharing and virtual team working among librarians introduced</li> <li>5. Increased potential of Bulgaria's public libraries network to service the citizens</li> </ol>	<p>ability of library users to find and process information</p> <p>growing number of library visitors using e-mail, Skype, etc.</p> <p>number and type of e-services / resources in target libraries</p> <p>instances of cooperation among libraries and new modes of cooperation in servicing users</p>	<p>questionnaires to librarians, users and local stakeholders</p> <p>focus groups and individual interviews</p> <p>special statistical forms filled by librarians</p>

OBJECTIVE	4. ACCELERATED INTEGRATION INTO THE INFORMATION SOCIETY	INDICATORS	METHODS OF ASSESSMENT / VERIFICATION
<b>IMPACT</b>	THE PROGRAM CONTRIBUTES TO BRIDGING DIGITAL DIVIDES		
<b>OUTPUTS</b>	<ol style="list-style-type: none"> <li>1. ICT infrastructure (workstations, periphery and internet) operational in target libraries</li> <li>2. Library users trained and able to communicate beyond their communities using ICT</li> <li>3. Higher spread of electronic information tools and services (e-government, library catalogs, on-line databases, search engines, commercial portals, e-banking, blogs, self-presentation)</li> <li>4. Joined information products/tools designed/maintained by librarians</li> </ol>	<p>number of target libraries with operational ICT infrastructure</p> <p>number of visitors and ICT users in libraries</p> <p>number and type of electronic information tools and services in libraries</p> <p>number and type of tools designed</p>	<p>PMU records</p> <p>special statistical forms filled by librarians</p> <p>questionnaires to librarians, users and local stakeholders</p>

---

### **7.3. Data Collection Methods for the Impact Assessment, Internal and External Evaluation**

As explained in the IPAF table the following methods for data collection will be applied:

- sociological surveys
- questionnaire to users, to librarians, to community leaders and local stakeholders, to citizens
- focus groups and interviews
- training component records
- web portal review and web counter data
- PMU and District Coordinators' records and reports
- library statistics and annual reports
- e-content vendors statistics
- success stories / thank you letters
- analysis of public media content

As part of the program's training component, target librarians will be instructed to complete special statistical forms in the framework of their regular record-keeping (e.g. total library visits, number of public access Internet workstations, number of virtual reference transactions, number of user instructions, and percentage of remote library visits). The forms will be developed by the PMU.

To be selected impact assessment subcontractor (sociological company) will develop questionnaires to librarians, users and local stakeholders in close cooperation with the PMU. These questionnaires will be used for the baseline, mid-term and final surveys.

Focus groups and individual interviews will be conducted as part of the impact assessment, and also in the framework of the envisaged internal and external evaluation.

Copies of thank you letters and success stories from the field will be collected by the three Field Coordinators and will be submitted for analysis and reporting purposes to the PMU.

### **7.4. Stakeholders of the Impact Assessment**

The PMU will analyze the impact assessment results and will present them to the Program Board, which will take adaptive management decisions to ensure successful program implementation and long-term sustainability of results. The PMU will also use the impact assessment results in conducting the program's advocacy and communication work: reporting achievements and challenges to the general public, the library community, national and local decision makers. The impact assessment results will be used to elicit central and local stakeholder interest in and commitment to the various components of the program. Last but not least, the dissemination of impact assessment results will be used for achieving scale by bringing on board the initiative public libraries that are not among the 900 direct target libraries of the programs.

### **7.5. Impact Planning and Assessments Timeline**

There will be baseline, mid-term (2011) and final (2013) impact assessments for the program. Since three stages of inclusion of target libraries (2009, 2010 and 2011) are foreseen, three

---

separate baseline studies will be produced. The mid-term impact assessment in 2011 will cover target libraries included in the program in 2009 and 2010. The baseline study in 2011 and the mid-term impact assessment in 2011 will coincide in time and will be carried out by the same subcontractor. The final impact assessment in 2013 will cover all target libraries.

## **7.6. Monitoring and Internal Evaluation**

Each of the PMU members will carry out activities in their area of responsibility based on the plan included in the Country Grant Proposal and on detailed operational plans. PMU members will be responsible for close monitoring of the work of the District Coordinators, consultants and subcontractors in their respective area.

The PMU (Monitoring and Impact Specialist) will develop a special system for internal monitoring and evaluation of the program implementation. This system will be agreed with the program partners and will be enhanced on a continuous basis. Among other, the system will include: completion of special statistical forms by target librarians; progress reports from the District Coordinators, consultants and sub contractors to the PMU; field visit reports of the PMU members. The purpose of monitoring and internal evaluation will be to self-identify issues, challenges, ways to address them and opportunities for improvement.

The Monitoring and Impact Specialist will consult with the other key PMU members and with the District Coordinators, and will propose internal evaluation formats and protocols to be followed. The formats and protocols will be approved by the Program Management Committee. The internal evaluation forms will be analyzed by the PMU and key messages will be brought to the attention of the Program Board.

### *Weekly meetings of the PMU members*

During those progress review meetings the PMU members will provide the Program Manager with progress reports regarding their area of responsibility. Whenever needed, specific issues at hand will be discussed within the PMU and resolved.

### *Regular meetings of the PMU and the Program Management Committee (PMC)*

These backstopping meetings will ensure that the lead organization (Ministry of Culture) and the fiscal agent (UNDP) approve the planned course of action for the various activities and tasks. Routine amendments to the program work plan will be agreed and Program Board – Expert Level (Working Group) meetings will be prepared.

### *Quarterly progress reports*

Quarterly progress reports on all aspects (programmatic and financial) of the program implementation will be submitted by the Program Manager to the program partners.

### *Program Board – expert level (working group) meetings as required*

The Program Manager, the National Program Director (Ministry of Culture) and UNDP will agree on the agenda and timing for each such meeting, as well as on materials to be distributed in advance for review.

---

## **7.7. External Evaluation**

An independent mid-term external evaluation in late 2011 is foreseen, as well as a final independent evaluation in 2013. It is anticipated that mixed teams of international / national consultants will carry out these evaluations. The purpose of the mid-term evaluation will be to propose improvements in the program management, and also improvements based on the conducted mid-term impact assessment. The purpose of the final evaluation will be to capture the grant implementation process in its entirety highlighting challenges, results achieved, lessons learned and post-grant avenues.

## **7.8. Iterations of the Library Needs Assessment**

In the second year of program implementation (2010) a library needs assessment exercise similar from the planning phase will be conducted for those libraries that will join the program in mid-2010 and in 2011. The needs assessment results will be compared against the needs assessment conducted in 2008 and will be used for effective planning of necessary changes. As in the planning phase, the needs assessment will be used to analyze the current status of Bulgaria's public libraries network and for long-term strategic planning.

The needs assessment to be conducted in 2010 will target the entire community of public libraries in Bulgaria, in order to enable planning for introduction of ICT and Internet at public libraries in line with the actual national needs and not just considering the current country grant budget availability. The PMU, will advise the Program Board and the Public Council, as well as the Foundation regarding the outcomes of the needs assessment in terms of overall number of new libraries to be supported and in terms of their needs.