

Statewide Library Resources- Library Development Report September, October and November 2015

Prepared for the December 9, 2015 Commission meeting
by Sarah McHugh, Director of Statewide Library Resources

This report represents accomplishments of Statewide Library Resources Library Development staff: Ken Adams, Jennifer Birnel, Jo Flick, Jessie Goodwin, Jemma Hazen, Pam Henley, Amy Marchwick, Lauren McMullen, Cara Orban, Mike Price, and Suzanne Reyrmer.

Goal One—Content

MSL acquires and manages relevant quality content that meets the needs of Montana library users.

1.1. Enhance Montana State Library's statewide e-content subscription and purchase programs.

1.2. Work collaboratively toward developing, managing, presenting, and preserving Montana-relevant digital content.

SLR Work Objectives:

- Working with the MontanaLibrary2Go Executive Committee, develop a request for information in FY16 to gather information about other consortium models available through different e-content vendors. This will provide the consortium with more information to help assess value of existing contract and make informed decision for contract renewals going forward. *(Orban)*
(Update: December 2015) With input from the MontanaLibrary2Go Executive Committee, Orban prepared a request for information, issued in October. The Executive Committee met November 13 to discuss the results of the RFI. Seven vendors responded. The Executive Committee will review the responses from Baker & Taylor and Recorded Books to compare their consortium models to the existing contract with OverDrive. Orban will review responses that were submitted specifically for school and academic audiences and will share summary information through appropriate channels.
- Working with the MontanaLibrary2Go Executive Committee, review the current use of member library funds in the MontanaLibrary2Go annual budget and develop at least one different budget scenario that may address the need to cover both content and the annual hosting fee, where amount of available LSTA or patron counts may be variable. The desired outcome is a sustainable and affordable budget model to implement in FY17. *(Orban)*

- Run a test period with the live MontanaLibrary2Go Local pilot in which usage statistics and participant feedback is collected. Prepare a summary report detailing the pilot's objectives, work accomplished, how and why desired outcomes were or were not met, and recommendations for moving forward. Outputs and qualitative feedback from pilot participants will be collected and a report generated detailing knowledge and experience gained from the pilot which may be useful internally as well as to other libraries or library groups considering e-content management options. *(Orban)*
(Update: December 2015) The MontanaLibrary2Go Local pilot is live at <http://books.msl.mt.gov> and MSL staff has collected two months' worth of statistics to date. Circulation numbers average to 40 per month. The pilot is open to any MontanaLibrary2Go libraries that have SIP authentication capability. This includes all Montana Shared Catalog libraries that subscribe to MontanaLibrary2Go. Staff feedback has indicated that the site functions well. Orban is collecting more information from participating libraries about their selection policies and priorities for local content so that we can create a more meaningful and efficient way of developing this collection.
- Develop and articulate a method and schedule for collecting and evaluating statistics on content and access provided through LSTA funded projects in order to better understand effectiveness and use of identified statewide projects, and to streamline reporting tasks throughout the year. SLR staff will receive training on how to evaluate statistics. The expected outcome is that SLR staff managing identified statewide projects have access to sets of statewide statistics that represent standard periods of time, and that can be divided into smaller groups (library type, size, geographic region) as necessary. SLR staff will gain knowledge about statistics evaluation that will make data collection a more useful tool for improving services and training and outreach strategies, and for communicating the value of SLR content and services to stakeholders. *(Lead: McHugh)*
- Following reorganization of SLR and Learning Portal websites, develop a plan with Learning Portal and SLR Portal groups to study Google Analytics reports and carry out usability testing to better understand areas that may continue to need improvement. *(Lead: McHugh)*
- Present community engagement training and support at Fall Workshops, MLA retreats, MLA conference session and other meetings as appropriate, in order to develop an inventory of strategic partnerships and practices that can be shared with libraries statewide. Partnership areas include digital collections, digital inclusion, health information/insurance literacy, agriculture, and support for education. *(McMullen)*
Update: December 2015) McMullen coordinated a panel presentation at Fall Workshops on community partnerships and development programs from Montana Legal Services Association, One Montana, Harwood Institute, and Humanities Montana. These partners and programs offer Montana libraries the opportunity to host conversations on community enrichment, empowerment, problem solving, and progress. Many attendees expressed intent to offer the programs in their libraries in 2016.
- Identify 8-10 communities on the Hi-line in Montana that have rich collections of unique materials related to Montana's economic, social, cultural or political history or materials that document a more current transition, such as the Bakken project. Encourage these communities, in partnership with their local library, to add these collections to the Montana Memory Project. *(Birnel)*

(Update: December 2015) Birnel met with several library directors, museum directors, and historical societies on the northeastern Hi-line, demonstrating how to use the site and discussing possible collections the institution may consider adding. Some of the visits were brief and introductory in nature, others included a presentation of the MMP for larger audiences.

- Collaborate with staff of the Montana Historical Society and the Montana Office of Public Instruction to create classroom lesson plans for the Montana Memory Project so that teachers can easily incorporate this resource into their yearly teaching activities.

(Birnel)

(Update: December 2015) As new social media themes are developed the contact for these theme posts are being added to the Educational Resources section of the MMP as PowerPoints that can be downloaded and used by classroom teachers. Some examples are included here:

[World War II](#)

[Transportation](#)

[Firefighters](#)

[Horses and Horse Power](#)

[Logging Mills and Camps](#)

[Miners, mines, and mining camps](#)

[Boom and Bust: The Industries that Settled Montana](#)

- Explore in collaboration with UM, MSU, and The Montana Historical Society Research Center the possibility of becoming a direct service hub to the Digital Public Library of America. As a service hub we would send Montana Memory Project items to the DPLA and aggregate and harvest other Montana digital repositories to share with the DPLA.

(Birnel)

(Update: December 2015) Birnel and McHugh met with the other partners to discuss the options available and what needed to be explored. UM, MSU and the Historical Society Research Center have offered staff expertise and time to assist MSL in this investigation.

- Continue to seek a solution for individuals to share Montana related content through the Montana Memory Project, acting as a portal of discovery. *(Birnel)*
- Continue working on launch of new EBSCOhost e-book collection. The outdated MSC "NetLibrary" collection was inherited by EBSCOhost when it was purchased from OCLC. The collection is out of date and needs to be refreshed with updated content and returned to the MSC database for discovery. *(Adams, Price)*
- Collaborate with vendors and the MSC Content Management Committee to bring the MSC catalog into full compliance with RDA standards. Cataloging best practices need to include RDA standards not only to bring the catalog in compliance but also to take advantage of enhanced displays in discovery platforms. *(Adams, Hazen)*

(Update: December 2015) Received cost quotes from several vendors for the cost of updating our bibliographic records for full RDA compliance. All were very high. We can use our SirsiDynix Premier Platinum Services consulting hours to pay for the cost of them performing the service. The update has been scheduled to take place Dec 3, 2015

(Update: December 2015) The Content Management Committee had a special meeting in September and came to agreement on most of the standard cataloging practice changes needed for RDA. An updated Standard Cataloging Procedures document was finalized and posted to the membership shortly after the meeting.

Goal Two—Access

MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.

- 2.1. Improve the user interface of MSL's Web sites and improve and expand online service to meet changing user needs.
- 2.3. Improve Montanans' access to library materials (including discovery, request, and delivery), providing more materials to choose from, and making access increasingly efficient.
- 2.5. Assist Montana libraries with 'fulfillment', that is, getting the right library content into patrons' hands quickly, efficiently, and at prices that libraries can afford, regardless of whether the item is owned by the patron's local library.
- 2.6. Publicize Montana State Library's services and resources.
- 2.7. Support Montanans' continued free access to the Internet provided through local public libraries.
- 2.8. Actively investigate and implement, as appropriate, web-scale solutions including web-scale integrated discovery systems, cloud computing, centralized indexing and harvesting of content, to make the resources of Montana libraries discoverable in a single search.

SLR Work Objectives:

- Work with the Courier Advisory Board to review the current cost sharing structure, with the desired outcome of making the courier an affordable option for lower volume libraries. (*Orban*)
- Look for opportunities to extend courier service between Havre and Browning and develop a plan for sustaining service beyond this contract period which runs through December 2016. (*Orban*)

(Update: December 2015) Orban met with the Courier Advisory Board on October 22 to develop a strategy for planning for affordable and inclusive service in the second year of the contract and beyond. Currently, the group has \$5,428 in FY15 LSTA to sustain the \$2 per stop discount for current participating libraries. To complement the findings of the MSC Executive Board survey, Orban has distributed via listserv questions pertaining to physical delivery and courier service addressed to both potential and current participating libraries in order to learn more about partnerships,

affordability, and other service issues in advance of planning for 2016-17. Responses will be reviewed in December, and in January the Board will study different fee structure options that emerge as a result of those responses.

- Review authentication processes and authentication testing for statewide projects. Using authentication statistics and gathering feedback from library staff, determine which methods are working for libraries actively using statewide services. An expected outcome is that MSL staff gain a better understanding of how authentication is enabling or deterring library staff and patrons from using services, how any problems could be resolved and gains an understanding of current authentication options. *(Orban and Price)*
(Update: December 2015) Orban and Price worked together to create statistical reports from EZproxy logs sent monthly from OCLC. The reports cover authentication success rates and resources accessed, as well as indicate why users may not be successful in logging in. For 2015, as of October, EZproxy had been accessed 2,282 times. Missoula represents approximately half of this usage, at 1,131 logins, followed by Helena at 265 and Butte at 121. The failure rate averages to 23% and can mainly be attributed to incorrect entry of library card numbers. EBSCOhost, Taylor & Francis, and Reference USA are the most frequently accessed resources.
(Update: December 2015) Orban requested input from other state library agencies to learn more about their preferred authentication methods and their experiences working with vendors for statewide implementation. The four states that have responded (South Carolina, Massachusetts, Michigan, and Wisconsin) use geolocation and work with vendors on an individual basis to distinguish usage statistics by location. Based on these responses, geolocation is a top priority for further study and trial, if possible, in early 2016.
- Contribute to the redesign of the My Montana Library website, with a focus on three major areas: Statewide Projects and Services, Community Partnerships, Montana Culture. This project is undertaken in order to improve the existing site by making it more responsive to direct library end user expectations. *(Orban, McMullen, Groves)*
- Create a “Montana Public Library Websites” cohesive effort so that all public libraries will have vibrant websites that provide excellent virtual services to their communities, including local access to statewide resources. *(McMullen, Henley, Reymer)*
- Create a promotional campaign about the MSL consulting program, which may include an improved web presence, brochures and/or newsletters. Library directors and trustees will become better informed about consulting services available to them because of this campaign. *(McMullen, Henley, Reymer, Groves)*
(Update: December 2015) A promotional brochure highlighting the consulting program was created and distributed at the MACo Conference in September. The brochure focuses on the areas of consulting services MSL makes available to public libraries and introduces the three Statewide Consulting Librarians and their consulting territories. Additional work on this initial brochure is expected this winter.
- Launch an RFP process to seek options for new MMP software. The RFI done in FY 2015 revealed there are several new vendors offering services that compete with our current solution, CONTENTdm. This RFP will determine if there is a better alternative for usability and costs. *(Birnel)*

(Update: December 2015) The RFP has been put on hold until the recommendations from the MSL Library Development Study Task Force have been made to the Commission and action taken.

- Work to improve Search Engine Optimization (SEO) of the Montana Memory Project. Create a Wikipedia entry for the MMP, so that it is recognized as a trusted source. Measure success through the use of Google Analytics. *(Birnel)*
(Update: December 2015) Birnel has consulted with colleagues at MSU and has learned more about improving search engine results. Several searching issues have been resolved and now mtmemory.org and montanamemory.org are consistently showing as the top two search results in Google and Yahoo. The work to improve the results list in various search engines will continue.
- Continue to coordinate development of both DiscoverIt and the new Enterprise end user front end to the MSC catalog in an effort to reach library users in either environment, meeting the user wherever they may be searching *(Urban, Adams)*
(Update: December 2015) The direct link between Enterprise and the statewide EBSCO Ebsco Discovery System (EDS) has been established and is being added to the individual Enterprise library profiles. The link provides seamless searching between the two interfaces.
(Update: December 2015) With the upgrade to Enterprise version 4.5, Enterprise and DiscoverIt search results can now be interfiled on the same search results screen. The results include the "Research Starter" from EBSCO Enterprise Discovery Services as the first section of the display along with separate facet columns for both services.
- Participate in evaluation and testing of the MSC's cloud-based library management system as it is rolled out by the vendor. Along with providing support to members as they learn about the new products, our participation will help ensure vendor development of cloud based cataloging, circulation and acquisition interfaces includes functionality required for consortia. *(Adams, Marchwick, Hazen, Goodwin, Price)*
(Update: December 2015) "BLUEcloud" web services were installed on the MSC production server, which enables MSC staff to begin testing, evaluating and using the cloud based products now being developed by SirsiDynix.
(Update: December 2015) BLUEcloud Analytics is now 90% functional with catalog, item, user, and historical usage statistics. Special accounts have been created for selected MSC member libraries so that they can begin becoming familiar with the product and assist the MSC staff with training which will begin in spring 2016.
(Update: December 2015) BLUEcloud Cataloging has been implemented for testing on the MSC test server. It is not ready for consortial use yet but new functionality is added with each web services upgrade from SirsiDynix.
(Update: December 2015) MSC staff has signed up to participate in the pilot evaluation of the Circulation and Visibility (linked data) products currently in development. "Visibility (linked data)" broadens the results of Shared Catalog searches so that they are included in major search engines.
- Complete MSC Enterprise online catalog implementation for all MSC libraries and discontinue use of the older iBistro/eLibrary interface. Ending local support for eLibrary will reduce staff workload. *(Adams, Price)*
(Update: December 2015) Enterprise profiles have been completed for all MSC member libraries and are in use, live, by 75% of the members. All member libraries'

profiles will be in production by Dec 31st, after which, access to eLibrary will be discontinued.

- Increase use by MSC member library staff of mobile devices and services available for interface with the MSC library management system enabling them to keep current with technology as it trends toward a more mobile user environment (*Adams, Marchwick, Hazen, Goodwin, Price*)
(Update: December 2015) Increased training opportunities along with improved functionality has led to much wider acceptance and interest in MobileCirc with many libraries now using it as their primary tool for completing inventory.
(Update: December 2015) A major marketing push for the Shoutbomb SMS texting service took place in May and June and has more than doubled the number of libraries and patrons using the service. Nearly 10,000 text messages for are now being sent monthly.
- Investigate the potential of a centralized RFI process for at least some pieces of the E-rate program in order to better support those libraries wishing to take advantage of new discount opportunities in the program. (*Reymer*)
(Update: December 2015) Reymer has collected sample RFIs and RFPs from colleagues in other states which provide examples of the ways in which other state libraries are providing a more centralized approach to certain pieces of the E-rate process. This will assist us in considering this option for Montana libraries and how this approach might be developed within the Montana E-rate scene.
- Investigate the possibility of regional, consortial contracts for more uniform broadband services and pricing within E-rate program and without, in order to determine if an effort like this is feasible and would produce benefits to participating libraries. (*Reymer*)
(Update: December 2015) Reymer learned about the Georgia Public Library Systems regional, consortial approach to contracts and received helpful advice on negotiating with vendors.
- Stay involved with and attuned to national and state initiatives related to broadband development during this time of significant national and state discussions related to broadband needs, in order to ensure that Montana libraries stay informed and have a voice. (*Reymer*)
(Update: December 2015) Reymer attended meetings of the Internet 2 group and the Montana Telephone Association conference to learn more about alternatives and opportunities available within the state. Reymer also participated in the Silicon Flatirons meeting with the FCC to represent libraries' concerns about fiber build outs and E-rate modernization. Reymer also attended ALA E-rate Task Force meetings at the 2015 ALA Annual Conference and USAC E-rate Training in Portland. Changes in the program were a focal point.
- Contribute to the planning for and implementation of the rewrite of the Montana Library Directory with a focus on current and future uses of this statewide library tool. (*Leads: McHugh, Price*)
(Update: December 2015) An initial informational meeting was held in November during which the rewrite team comprised of McHugh, Price, Orban, McMullen, Flick and Colleen Hamer learned about the overall process. This team is now compiling a master spreadsheet of "user stories", based on the Agile project planning process, to share with the MSL IT staff that will be involved in the Directory rewrite. These user stories

communicate what functions SLR-LD staff, Montana librarians and trustees and the general public would like to see in a new Directory. The list is due to the IT staff in December, with the technical work scheduled to begin in January.

Goal Three – Training

MSL provides appropriate trainings and training resources so that the best use can be made of the resources offered.

3.1. Enhance Montana State Library's statewide training opportunities including all formats with client-learning as the Library's goal.

3.2. Provide users with trainings and assistance related to statewide offerings and resources.

3.3. Develop and present appropriate library leadership training for Library Directors and Trustees.

3.4. Provide regular training opportunities for MSL programs and services.

3.5 Train and assist users to contribute content to MSL's collections.

3.6 Provide a central repository of training materials in various formats that support and make successful ongoing statewide projects and MSL resources and services.

SLR Work Objectives:

- In response to the increasing turnover in public libraries as directors enter retirement, focus on training needs of new public library directors to provide essential information and skills. Develop a comprehensive training curriculum for new public library directors that utilizes the COSLA New Directors 101 series and supplements that with Montana-specific self-paced online tutorials. *(Lead: Flick)*
(Update: December 2015) MSL contracted with Sage Solutions, Non-profit Consulting to conduct three onsite 3-hour trainings on preparing for succession. Sage trainers, Terry Profota and Teresa Geremia-Chart conducted trainings at the following federation meetings: Broad Valleys, South Central, and Golden Plains. A session at Tamarack was later added to the contract and costs for that training were shared with the Tamarack Federation. Sage provided a *Succession Toolkit*, which was published in a spiral bound book and provided as a handout and workbook for the first three sessions. Attendance was nearly double in total to similar sessions that MSL has offered in the past, owing at least in part to the coupling of the training to the federation meeting. Feedback has been very positive; leading the LD staff to request a proposal for another round of trainings and a webinar series for Winter-Spring 2016.
(Update: December 2015) The COSLA New Directors 101 series is being published on WebJunction. MSL's CE Coordinator served on the committee that created the 4-part video series and accompanying learner's guide/workbook.
(Update: December 2015) An outline for essential training and information for new public library directors has been drafted by the CE Coordinator and a series of self-paced tutorials will be developed using Adobe Articulate Storyline over the winter. These tutorials will focus on essential, Montana-specific information that every new

public library director needs to know. A page on the Learning Portal will be devoted to New Directors with the “essential” curriculum to include links to the COSLA series, the self-paced tutorials, and “suggested” curriculum to explore related training.

- Using Camtasia, develop one tutorial each month for Statewide Projects to meet needs unique to Montana libraries and not available through vendors. This would result in higher statistical use and higher level of interest in statewide projects, as indicated by statistical reports and by number of monthly inquiries. Less time spent answering repetitive questions about a process that could be demonstrated through a recorded tutorial, indicated by online visits to tutorial. *(Leads: Orban, Flick, Goodwin)*
(Update: December 2015) The CE Coordinator created an online [tutorial](#) on the Hunter-Planner Map in collaboration with the GIS manager for FWP.
(Update: December 2015) Orban has created two short tutorials for MontanaLibrary2Go using Camtasia and posted them to the MontanaLibrary2Go Learning Portal page.
(Update: December 2015) MSL holds five Camtassia licenses and one Adobe Articulate Storyline license, but it takes time to learn to use the software and the staff has been struggling to find the time. The MSC trainer has been the most productive on this effort. Going forward, training staff plan to meet online in December to focus on Camtassia collaborative training with all staff committed to making an attempt before the meeting, so they can identify their hurdles and use peer support to overcome them.
- Establish a school library liaison for coordinating efforts in training and outreach on EBSCO content and services. This will provide more meaningful information sharing between school libraries and MSL results in higher use of existing services and/or better understanding of how services could be improved to meet student needs. *(Orban)*
(Update: December 2015) In September, Orban contacted NAC representatives Dana Carmichael and Joanne Didriksen to discuss the use of statewide databases and to learn more about developing outreach and training specific to the needs of school libraries, considering their primary means of communication, curriculum standards that must be addressed, and any barriers to use of statewide resources that we may not have considered. Both responded that in-person networking and conference opportunities were important and more effective than mass distribution avenues; that school librarians are looking for content that directly supports Common Core standards and cannot spend a lot of time sifting through other materials; and that librarians need a higher level of support in customizing EBSCO interfaces to create a relevant, age-appropriate set of results. As a result of this initial outreach, Joanne Didriksen invited Orban to attend the Helena School District Librarians monthly meeting in October, where she shared an introduction to statewide library resources available to school libraries and invited school library staff to contact MSL for assistance with any of these resources.

Goals for this year related to increasing use and understanding of the databases by schools include understanding more about schools’ and school libraries’ needs and what kind of content they need from us in order to develop meaningful services and outreach; removing barriers to easy authentication and access; and building up a centralized web presence for database information, intended for library staff, on the MSL Learning Portal. Resources will include tutorials and training resources and downloadable promotional materials for the databases most used by or most useful to school libraries. Highlighting resources especially for teachers and teacher librarians;

and promoting knowledge sharing by collecting materials from school libraries that demonstrate the use of EBSCO databases to share with other libraries are also in the planning stages.

- Transition responsibility of makerspace pilot trunks to federations. Federations' responsibilities will be to facilitate movement of the trunk within the federations. The Statewide Projects Librarian will continue to provide a basic orientation to new hosting libraries and to collect signed paperwork and statistics from hosting libraries. Keeping the makerspace kit within the federations allows MSL staff to focus less on the time-consuming matter of statewide logistics for six trunks and more on targeted training that will benefit libraries hosting the trunks. *(Orban)*
(Update: December 2015) Beginning in October, the six makerspace trunks have been assigned to federations in order to reduce time spent planning around logistical challenges, while Orban will continue to provide online training and orientation for makerspace hosting sites and collect statistics and evaluations for the project. Online orientation was provided for Boulder Community Library and St. Matthews School Library in October.
(Update: December 2015) Orban worked with library consultant Sue Walker at the Idaho Commission for Libraries to gather and organize survey information from small and rural libraries in both states in order to create a best practices guide for smaller libraries that are interested in starting a makerspace. This work culminated in a presentation at the Association for Rural and Small Libraries conference in Little Rock, Arkansas, in October.
- Present at least 3 strategic planning trainings to public library directors and boards, to include succession planning where needed. This is in response to the continuing training requests for strategic and succession planning, as directors and boards change. Make better use of resources created by COSLA and other regional and national organizations by organizing links in the learning portal and developing a flyer to inform library boards of material and training available. *(McMullen, Henley, Reymer, Flick)*
(Update: December 2015) COSLA trustee training materials developed this year include a checklist for hiring a new director with links to resources and the development of templates for hiring: outlining goals for the hiring process, sample job descriptions, sample job ads, interview questions, tips on checking references, how to introduce the new director to the community. Flick served as the COSLA working group leader for this project.
- Present at least 3 board development trainings to public library directors and boards, focusing especially on those libraries that have new directors or boards. *(McMullen, Henley, Reymer, Flick)*
(Update: December 2015) McMullen facilitated a library board conversation at North Lake County Public Library on planning, future projects, and resources available from the State Library. The conversation gave attendees a chance to listen to one another, identify themes for moving forward and answer specific questions together.
(Update: December 2015) Henley conducted a joint board orientation for Fallon County and Ekalaka library boards. In addition to normal board topics, the issue of hiring and retaining a library director in Ekalaka was discussed, as this is an ongoing issue for this library.

(Update: December 2015) Reymer facilitated a library board training at Madison Valley County Library in Ennis for new and existing board members to familiarize them with the duties of their job and their role within the Montana library community.

- Produce short, on-demand webinar trainings about creating high impact reports and presentations to tell the library story using data from the Public Library Statistics. *(McMullen, with other MSL staff)*
- Continue to develop an MSC plan to address staff turnovers in MSC libraries, particularly schools to ensure that new staff receive information and training from MSC staff in a timely manner. *(Adams, Goodwin)*
- Develop training curriculum for new MSC software and services in order to ensure consistent training resources are available to all MSC sites *(Goodwin)*
(Update: December 2015) The outline of the training curriculum is in place and will be integrated into the MSL training portal during its redesign process.
- Recruit trainers from the MSC membership to assist with the MSC training program in order to increase regional on-site training opportunities and share knowledge among MSC library staff members *(Adams, Goodwin)*.
(Update: December 2015) Library staff has been selected to begin using the new statistics platform, BLUEcloud Analytics, and help MSC staff with the significant training curve necessary to effectively use the product.
(Update: December 2015) Library staff has been selected to begin using limited-access administrative accounts in Enterprise to learn how to carry out their own local customization and help train others.
- Recruit new participants for and coordinate the statewide Montana Name Authority Cooperative Funnel (NACO). This ensures that Montana-specific Name Authority Records for original works are being created in the Library of Congress and WorldCat. Organize a refresher training for interested Montana NACO Funnel members. *(Hazen)*
- Organize a train-the-trainer meeting over winter with MSL trainers to review the use of the universal evaluation instrument developed in FY15, make revisions as needed, and determine best practices for harvesting, analyzing and sharing information gathered with the tool. *(Flick)*
(Update: December 2015) MSL staff who regularly provide training are planning to meet in December or January. The universal evaluation tool has been in beta use since May, and several training staff has used it for a variety of different trainings: Summer Institute, Fall Workshops, onsite MSC trainings, board development trainings, webinars, Ready2Read Rendezvous. At the trainer's meeting, the form will be finalized with input from all the trainers and everyone will receive training on how to access the forms and process the resulting data.

Goal Four—Consultation and Leadership

4.2. Advise Montana Library Directors and Trustees regarding administrative concerns, such as funding, budgeting, policies, and personnel.

4.3. Establish and maintain contact with Library Directors and Trustees, and other MSL

partners, to remain cognizant of their needs and the challenges they face.

4.5. Provide leadership and support to identify and address key information gaps for MSL partners and patrons. Gaps may include but are not limited to early literacy, access to sustainable Internet and technology services, access to legal and medical information resources, job related services and services to seniors.

4.8 Facilitate more state-wide purchases of content, supplies, and programs that benefit all Montanans through their local libraries.

SLR Work Objectives:

- Assist the MSC Executive Board in their work to complete the MSC Strategic Plan and their review and update of MSC by-laws and contract. *(Adams and McHugh)*
(Update: December 2015) The membership approved the MSC Strategic Plan at their Spring meeting and the Executive Board, using survey results, are working on goals for the plan.
(Update: December 2015) The MSC membership approved revised by-laws and an updated member library contract during their Fall meeting.
- Produce additional information resources for districts, such as a template of legally-mandated policies and guidance about board education. *(McMullen, Henley, Reymer)*
- Research and develop economic models intended to illustrate the benefits of shared administrative infrastructure in library districts, multi-library systems and other partnership arrangements. Examples might include: cost savings and efficiencies to be gained if county-wide standalone libraries merged into a single county library, or outsourced administrative services that could be provided for district libraries. This report will inform public library directors and trustees about options as they make future decisions for their libraries. *(McHugh, McMullen, Henley, Reymer)*
- Update the SLR Learning Portal training resources related to public computing centers, to provide current information to public libraries as they offer this kind of resource to their communities. *(Reymer)*
- Working with the Montana Library Association, develop a mentorship program to support new public library directors. This would create a partnership between experienced and new directors, offering increased support and possibly reducing chronic turnover in rural libraries.
Update: December 2015) Henley presented an overview to the MLA board and formed a committee to develop a strategy to implement this program. We will report back to the board in January and present a program at the MLA conference in April.

Goal Five—Collaboration

MSL promotes partnerships and encourages collaboration among its users.

5.3. Assist users in developing collaborative relationships and cooperative projects with other state, regional, national, or international partners (libraries, schools, colleges, museums, archives, local and tribal governments, non-profit organizations, government agencies, the

business community, et cetera).

5.5. Assist partners in developing web-accessible Montana-related digital content, and provide Montanans with access to digital collections and items relating to Montana's cultural heritage.

5.6. Promote library-related automation, data, networking standards, and web-scale solutions.

5.7. Work toward regional cooperative efforts, programs, and products that bring additional information value to Montanans.

SLR Work Objectives

- In partnership with MLA, develop a robust online community where Montana librarians, staff and trustees can share information and resources, solve problems together, and collaborate to provide better services in their communities. *(Lead: McMullen)*
- Complete the MSC system policies reorganization effort. This work re-aligns the MSC with its original goals of enhancing optimum resource sharing and library development among MSC members and striving to keep MSC staff costs down. *(Adams, Marchwick, Hazen, Goodwin, Price)*
(Update: December 2015) This work is the high priority for Hazen and Marchwick and most of the remaining libraries have moved to the new system policies. Final reorganization work is scheduled to be completed by the end of this year, though a few MSC member libraries will need to delay until their local library board process for changes to circulation policies can be completed.
- Encourage cataloging partnerships between MSC libraries with the aim to leverage the cataloging staff at larger libraries to help smaller libraries who do not have dedicated cataloging staff. *(Hazen)*
(Update: December 2015) Several serious discussions within the membership about this concept began during the MSC Fall Membership Meeting and those discussions continue. Efforts to clarify levels of cataloging needs within the membership and methods of sharing original cataloging work will continue in 2016.
- Produce resources about the creation of library branches, including existing documents and suggestions for best practices. The branch option may in some cases offer greater access to library services in smaller communities, at lower costs, and increase usage of statewide resources. *(Henley)*

Goal Six—Sustainable Success

MSL is efficient and effective (measured against partner and patron outcomes) and is engaged in fulfilling its mission.

6.3. Evaluate new and continuing content and services against MSL's mission and long range plan.

6.5 Use Federal Library Services and Technology Act moneys to support new MSL pilots and projects; and support ongoing projects using State funds.

6.7. Foster staff members' value and satisfaction in their achievements and their contributions to MSL's mission.

6.8. Diversify MSL's staff knowledge, skills and abilities.

6.9. Develop the leadership and management skills of MSL staff.

6.11. Provide for an information technology infrastructure which insures industrial strength capacity, and reliability.

SLR Work Objectives:

- Work together to provide additional and more consistent training on the content of our SLR webpages with the goal of significantly increasing the ability of all SLR staff to quickly, efficiently and successfully find answers on the SLR site to questions they are asked by external users, instead of passing the question on internally, wherever possible. *(Lead: McHugh)*
- Renew our focus on improving the existing SLR website to make the information and format on the individual project pages more consistent, where relevant. *(Lead: McHugh)*
(Update: December 2015) The SLR-LD staff managing statewide projects (Orban, Adams and Birnel) and the staff focused on library development, consulting services and training (Henley, McMullen, Reymmer, Flick and Colleen Hamer) met separately to identify ways to make standard, common information on their pages more consistent and to review the overall flow of these two major sections of the Library Development pages under the "Services to Libraries" sections of the MSL site. Reorganization of the content under Statewide Projects and under Library Development has happened and is continuing in order to meet this goal.
(Update: December 2015) The SLR-LD web leads, Orban, Henley and Flick, have met regularly with SLR-LD staff to discuss the layout, organization and design of the SLR portal pages as part of the upcoming move to the new design. These web leads will begin meeting with McHugh monthly to communicate discussions and come to decisions on changes where needed. The November decisions included selecting the content for four navigational tiles and investigating the possibilities of a customized search box for SLR-Library Development content.
- Create a standardized, consistent approach to managing directories and content on the internal SLR drive so that information available there is more easily retrieved. This work will include instituting appropriate archiving practices. *(Lead: McHugh)*
(Update: December 2015) Jim Kammerer shared an update regarding appropriate archiving practices with the SLR-LD staff during one of our monthly meetings. Once the MSL website redesign is completed, we will look to the organization of the content on the SLR portal to inform our approach to managing and organizing directories and content on the SLR drive.
- Create an internal tool using OneNote software to better manage internal communication and planning related to specific internal SLR efforts, such as news and announcements, reports and work plans and event planning. *(Lead: McHugh)*

(Update: December 2015) SLR-LD meetings and events are now planned and organized via OneNote notebooks that enable those participating to add to agendas, post additional materials and plan for events.

- Complete the process of adding all remote SLR staff to the virtual desktop environment to significantly improve staff ability to easily and quickly access the same internal storage used by Helena based staff. *(Lead: McHugh)*
(Update: December 2015) McMullen and Henley now have virtual machines. Reymer and Marchwick will receive their new machines as soon as MSL receives a replacement server that is necessary to provide a virtual desktop environment to these additional remote staff.
- Continue to work with other MSL managers to identify a possible project management tool that will be available to all staff for the purpose of implementing and managing various pilots, projects and programs of all kinds, as needed. *(Lead: McHugh)*
- Provide at least one training session for SLR staff to lead them through the new LSTA reporting process. *(Orban)*
(Update: December 2015) Orban met online with Adams, Birnel, Flick, Christie Briggs and McHugh on November 4 to lead them through the changes pertinent to their reports in the new LSTA State Program Report format. Orban has prepared and distributed spreadsheets for each of the project managers outlining data and narrative information to be compiled for the report, which is due January 29.
- Evaluate future hardware requirements for the MSC system and explore the possibility of using virtual machines or hosted services. *(Leads: Adams, Price, Marchwick, McHugh)*
(Update: December 2015) Adams began the discussion with the MSC Executive Board during their Summer Retreat in Darby in July and again during the MSC Fall Membership Meeting. The value of future hardware needs and potential hosting was underscored when MSC Staff spent a considerable amount of hours over the summer to replace aging local hardware (power supplies and data storage units).
(Update: December 2015) A hosted service was implemented with SirsiDynix for replacing the now, out-of-service Windows 2003 server that was running Directors Station.
- Develop a plan to harvest certification application data and CE tracker data in order to create a report schedule and a statistical analysis plan. This schedule and plan will inform SLR staff about the trainings in which librarians are engaging and current training needs. *(Leads: Flick, Price)*
(Update: December 2015) Flick has included the harvesting request in the Library Directory "user stories" currently being compiled as part of the Directory rewrite process.

Additional updates, December 2015:

- In partnership with Humanities Montana, McMullen staffed the Montana booth in the Pavilion of States at the National Book Festival, promoting Montana literature, literacy resources, and more. This was a wonderful opportunity to spread the word to a national audience about what Montana offers through its libraries, landscape, and cultural programs.

- McMullen provided orientation and assistance to new Pathfinder Federation Coordinator with the FY2015 Federation Annual Report process and planning for her first Federation meeting as coordinator. The new coordinator has already improved meeting procedures and communications between member libraries, and shows potential in other areas of leadership for the Federation.
- McMullen facilitated a conversation among librarians at Fall Workshops about the future of library collections and technical services. In addition to a presentation/review of current tools and trends, librarians and staff from public libraries of all sizes shared their own experiences of change, solutions, new ideas, and visions of future collections. In survey feedback, many attendees described a change in their thinking about the library collection of the future. This led to discussions among several SLR-LD staff about the possibility of a “technical services online summit” in early 2016 to engage librarians around the state in a statewide discussion of the future of technical services’ implementation and processes. This summit would eventually inform MSL regarding training needs in this area.
- The librarians from the first [Public Library Partnership Project](#) (PLPP) training were invited to participate in a full day of training to learn how to create a digital exhibition. Birnel reports that the group was trained how to create an exhibit outline, how to select photos, and how to use Omeka software to build the exhibit. The day was a hands-on experience.
- The exhibition, [Boom and Bust: The Industries That Settled Montana](#), was published the first of September on the Digital Public Library of America website. Birnel reports that the group came together to produce an excellent story about the state and the history of its settlement. The participants worked hard to finish their themes and learned the process of creating an exhibit.