

The mission of the Library Development Department (LDD) is to develop library services so citizens have the information resources they need to build strong communities and to succeed individually. To do so, LDD works with public libraries to improve library services to Montana citizens; encourages cooperation among all types of libraries; and, initiates and implements statewide projects to improve all facets of library services.

**Issue 1: Montana library staff and public library trustees have ongoing and continuous needs for training.**

**Needs Assessment Summary:** 16% of Montana public library directors hold a Masters of Library Science (MSL) degree. 38% of Montana public library directors have earned a bachelor's degree. The directors of 46% of Montana public libraries have either an MLS or a bachelor's degree. The Evaluation recommends that MSL continue to provide continuing education to librarians, address the continuing education needs of library trustees, and use technology to deliver continuing education. Planning meeting participants ranked this issue, along with increased public library funding, as the highest priority.

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Although MSL has improved its education program, staff believes that greater emphasis needs to be placed on targeting training to appropriate audiences and developed to meet the audience's needs, based on known adult education principles, and appropriately reinforced.

MSL must work with other partners, the Montana Library Association, the Office of Public Instruction, and the University System, to ensure library staff and trustees have access to appropriate training.

In addition to formal continuing education, librarians, trustees, and public officials have ongoing needs for information on a myriad of topics, including library funding, technology, opportunities, and laws. The Evaluation substantiated the fact that MSL consultants are a valuable and respected resource for this information stating that the consultants play "a critical role in troubleshooting, training, technical support and just plain hand-holding." MSL staff will continue to fill this information need, providing timely and accurate consulting services.

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**\*Goal #10:** Montana public librarians and trustees have easy access to the training that they need to provide quality library services to their communities.

**LSTA Purpose:** Linking libraries electronically with education, social or information services; assisting libraries in accessing information through electronic networks; encouraging libraries in different areas, and encouraging different types of libraries to establish consortia and share resources.

**Key Output Targets:**

1. By 2007, three additional Montana libraries employ a director who holds a MLS.
2. By 2007, five Montana public libraries employ a director who completed an associate's degree in library technology.
3. By 2007, all Montana public libraries will employ a director who either holds a MLS, an associate degree in library technology, or has enrolled in the summer institute program.
4. Librarians, trustees, and public officials will continue to request information from MSL consultants and by 2007 will again rate the consulting services as critical to their success.

Key Outcome Targets: Montana citizens will report higher quality of library services.

**Programs:**

Insure that distance-learning based MLS programs are available and known by Montana's citizens and library workers. Provide menu of distance education MLS programs by June 2002 and update yearly. Explore Emporia or other programs holding classes in Montana by June 2002.

Evaluation: Not done. In revamp of web site, we need to provide a link to the "menu" offered by ALA or other organizations.

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MSL will review the certification requirements for public library directors. The Commission will consider the completion of an AA degree or the completion of the summer institute curriculum the required certification standard for library directors that serve communities with populations under 25,000 by July 2007.

Evaluation: The Western Council of State Libraries received a IMLS grant for a project coordinator to review all state certification programs. LDD will participate in this grant program. The College of Technology in Helena is considering offering a library technical track under their office technology curriculum.

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Each year, the summer institute will offer public library directors classes on basic library skills in a developmental sequence. MSL will explore making the classes a part of an associate's degree in

library technology. Explore other state's programs and make needed modifications by February 2003 and updated yearly

Because of budget limitations, LDD has used Gates Foundation grants to provide a summer institute and therefore, the institute has focused on technology. Ldd staff has devised a curriculum for the 2004 institute.

Create a curricula and sequence of training opportunities, provided by or coordinated by the State Library, for librarians and trustees. Where appropriate, organize these opportunities by topic and sequence. Integrate this curricula and sequence with MSL's existing certification program and requirements. Time frame: Ongoing.

Evaluation: Draft curricula completed in August 2003

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Facilitate the offering of an associate degree in library technology. Participate in Western Council's grant proposal to offer a distance-learning education program for library staff without a professional degree, by February 2003. With the Montana University System, explore an AA program in the state. Time frame: Ongoing.

Evaluation: See above

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Provide trustee training. In 2002, offer full-day trustee training in three locations. Evaluate training results and plan annual trainings each year.

Evaluations: Two full-day trustee training sessions offered in Billings and Great Falls, additional broad training sessions have been offered at local library board meetings.

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Provide 'training templates', 'canned' tutorials or workshops, or other opportunities (such as library versions of 'farm tours' to successful district and networked libraries in nearby states or provinces). Time frame: Ongoing.

Evaluation: Not done.

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Continue to aggressively promulgate appropriate library automation, digital, and data network standards. Offer libraries a standardized method of collecting information regarding remote use of library materials. At least twice a year, MLN will modify its current standards page, as needed. MLN will use every opportunity to encourage the appropriate use of library automation standards.

Evaluation: continuing.

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Consultants will continue to respond to all requests from librarians, trustees, or public officials for information on library related issues. Responses from consultants can include data, interpretation, onsite training, mediation, brainstorming, explanation, support, or whatever a

particular situation requires to improve library services. In addition, consultants will serve as MSL's primary resource to assist librarians in the interpretation of the long-range plan and in achieving its library development goals. Time frame: Ongoing

Evaluation: Ongoing and popular....consultants are busy.

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**Issue 2: Some Montana citizens have inadequate library services because of declining or stagnant tax revenues.**

**Needs Assessment Summary:** The taxable valuation of all but three of Montana counties has decreased over the past three years. Decreases in valuation means decreases in library funding. 59% or 47 of all Montana public libraries have per capita income from local sources lower than the state's average of \$14.64. In 2000, 87% or 69 libraries had income from local funding below the national average per capita of \$20.18 in 1988. Planning meeting participants ranked "increase public library funding" as their first priority, tied with training.

**\*Goal #11:** To improve library services to citizens by establishing an adequate and stable taxing district.

**LSTA Purpose:** Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities.

**Key Output Target:** By 2007, three areas of Montana will be served by a library district.

**Key Outcome Target:** As measured through post-project surveys, community members will report that their library services have improved since the establishment of a library district.

**Programs:**

Develop an LSTA program that funds demonstration district projects. Time frame: starting in 2002 and continuing to 2005. March through June, planning and Evaluation of past year's project. July through September, project promotion including a grant-writing workshop. October through November, grant-writing period. December, grants evaluated and award notification.

January, grant award. Evaluation: Not done, still hope to accomplish with 2004 and/or 2005 LSTA funds.

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Promote library district formation. Make presentations at federation meetings, to individual city and county commissions, to state associations, and to pertinent organizations, ongoing. Create a mock, model library district. Make library-funding part of Montana State University Local Government Center's agenda to educate local officials. April 2002. LDD has offered presentations at federation meetings and to individual library boards as invited.

Completed a draft District Library Handbook

**Issue 3: Public libraries in Montana do not receive adequate state aid.**

**Needs Assessment Summary:** Direct state funding represents 2.6% of the operating income of Montana's public libraries. The national average is 12.6%. Planning meeting participants ranked "increase public library funding" as their first priority, tied with training.

**Goal #12:** To ensure that all Montana citizens have access to quality library services.

**LSTA Purpose:** No LSTA funds will be used in this project.

**Key Output Target:** To increase the amount of direct state aid to Montana's poorest public libraries by 50% by July, 2007.

**Key Outcome Target:** As measured through post-project surveys, community members report that their library services have improved since the increase in state aid.

**Program:** Provide information on the state of Montana's poorest public libraries to legislators in 2003 in preparation for a request in the next two sessions. Request increases in state aid 2005 and 2007.

**Evaluation:** LDD recommends that MSL reviews the state aid package, including every program, to ensure that state aid is congruent with the Commission's goals for library developments.

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**Issue 4: Montana citizens do not know about the services offered by their community libraries.**

**Needs Assessment Summary:** Planning meetings participants ranked this issues as a high priority. In addition, the **Evaluation** contained two recommendations regarding public awareness.

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The first was that, "MSL should consider including and funding a public awareness component in each new initiative that has a direct impact on current and potential library users." The second was that, "MSL should consider using LSTA funds to support a public awareness campaign." MSL believes that the responsibility for promoting library services is shared between the state and local libraries. This plan defines responsibilities for MSL, including training librarians and trustees. Montana ranks very low on almost every economic indicator scale. To address Montana's economic development, Governor Martz has recently released a "Framework from Economic Development". MSL's marketing efforts will focus on the important role of libraries in economic development.

**\*Goal #13:** Montana citizens will understand, value, and use the services of Montana's libraries.

**LSTA Purpose:** Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities.

**Key Output Targets:**

1. By the end of 2005, 85% of Montana public library directors will attend a workshop on marketing to local communities.
2. By the end of 2002, MSL will develop and implement a marketing plan for the state's libraries.
3. By the end of 2007, public library visits, on-site and remote, in Montana will meet the national average of 4.2 per capita (1998). In 1998, Montana public libraries averaged 3.8 per capita.

**Key Outcome Targets:**

1. Public librarians will increase their knowledge and skills in developing a sustainable marketing plan because of attending marketing workshops.
2. Citizens highly value public library services.

**Programs:**

Develop a marketing workshop by the end of 2002. Schedule the workshop for federation meetings in Fall 2003. Promote attendance at workshops. Offer the workshop in other venues during 2004 for those unable to attend in 2003. Offer follow-up workshops in 2005.

Evaluation: Marketing workshops presented at three of the six federations, as well as at fall workshop Montana's "Need it, Find it @ your library" statewide campaign launched on September 1, 2003. Provide press releases and other marketing materials to all libraries for every MSL activity, such as summer institutes, fall workshops, and new services or products. Time frame: Ongoing.

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Provide bibliographies to library staff and trustees on marketing. Time frame: September 2002 and updated annually.

Provided as part of statewide campaign press kit.

**Issue 5: MLN must seek other methods of funding, and efficiently and effectively manage and promote its programs and services.**

**Needs Assessment Summary:** Montana receives a limited amount of funds from LSTA and has many library improvement needs. MLN, which provides and promotes networked library services, is funded by a significant portion of Montana's LSTA annual allocation. The Commission wishes to find adequate, stable funding to continue MLN services.

The recent Evaluation also makes recommendations for MLN that include the following: MSL should attempt to demonstrate the value of MLN programs to small libraries. This may include new MLN initiatives or a refocusing of current initiatives to make them more attractive for small libraries to participate. MSL should attempt to clarify the future role of MLN and should plan its funding strategies according to its determination.

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**\*Goal #14:** Montana citizens have easy and complete access to the information that they need at their libraries.

**LSTA Purpose:** Establishing or enhancing electronic linkages among or between libraries; and encouraging libraries in different areas, and encouraging different types of libraries, to establish consortia and share resources.

**Key Output Targets:**

1. By 2007, one-half of MLN core funding is derived from state, local, or private funding.
2. By 2007, three-quarters of Montana libraries participate in one MLN project or use one MLN service.

**Key Outcome Target:** The majority of Montana library directors cite that library services have improved because of MLN.

**Programs:**

Explore alternative funding strategies. This may include but is not limited to: Aggressively pursuing business and new governmental partnerships for funding and for help with providing services; seeking governmental alliances to encourage statewide and local support for MLN related projects; pursuing grants for one-time or start-up project funding. Time frame: Ongoing.

Evaluation: MLN relies on federal funding through the LSTA funds. No state, private, or other federal funding has been secured for MLN.

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Strive to insure that all libraries can all equally participate in MLN offerings. Identify Montana poorest libraries noting in particular where libraries are unable to participate in MLN offerings and work with them to create solutions. Timeline: Ongoing.

Evaluation: MLN has been success at offering membership in OCLC for rock-bottom prices to all Montana libraries.

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Increase the value and use of the MLN Gateway. MLN will ensure that the gateway stays current and grows to include more libraries and resources. The gateway will be available for those libraries without an integrated library system and provide portal functions for all Montana's library users. Timeline: Ongoing.

Evaluation: The Gateway has proved to be valuable to many Montana libraries.

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MLN will focus on marketing its services to all Montana libraries and on providing materials for libraries to market themselves. MLN will formulate a marketing strategy, for marketing MLN resources and service to libraries by June 2003. By January 2004, MLN will make available marketing resource prepared for end-users, focusing on existing MLN resource and services. These materials will grow in number and scope.

Evaluation: MLN has not created a formal marketing strategy, but continues to promote its services through demonstrations and presentations at appropriate meetings and conferences and through regular posting on "Wired-Mt".

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MLN will demonstrate its value to smaller libraries, with either new initiatives or refocusing current initiatives. A small library needs assessment will be completed by July 2002. Program and marketing strategies will be completed by September 2002 and implementation will begin by 2003.

Evaluation: see above.

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MLN will continue to act, in partnership with others, as the state agency's library-oriented research and development unit, experimenting with promising technologies or processes when in support of MSL goals. Time frame: Ongoing.

Evaluation: Because of limited funds, MLN cannot provide as much R&D service as desired.

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**Issue 6: The people of Montana do not have access to quality, electronic full-text resources.**

**Needs Assessment Summary:**

1. Students in K-12 schools in Montana do not have access to adequate information resources.
2. Citizens through their public libraries, which are funded at 57% of the national average, do not have access to adequate information resources
3. In 1998, nationally public libraries spent an average of 1% of their total operating expenditures for materials in electronic format. During the same time, Montana public libraries only expended .004 of their total operating expenditures for these materials.

**\*Goal #15:** Citizens and students have easy access to and use multiple electronic information resources through their libraries.

**LSTA Purpose:** Assisting libraries in accessing information through electronic networks; and linking libraries electronically with education, social, or information services.

**Key Output Targets:**



1. By 2007, Montana citizens and students will have access to three additional, full-text electronic databases purchased through state and local funds.
2. By 2007, use of MLN managed electronic resources by all categories of users will have increased by 25%. All electronic information resources provided by the state will be monitored, benchmarked, and appropriate increases will be sought.
3. By 2007, 25% of Montana libraries will use cooperatives or networks to purchase discounted services and products.
4. By 2007, an increase number of Montana libraries will recognize the advantages of participating in a shared integrated library system. Based upon the number of shared catalog libraries in 2003, an increase number of Montana libraries will have joined, or be in the process of joining a shared system. 75% of academic libraries will participate in a shared catalog.

**Key Outcome Target:** Montana citizens and students use and value electronic information services available through their libraries.

**Programs:**

Provide access to more electronic information. Survey library communities to ascertain which products are needed. Create a prioritized list and estimate funding requirements. Monitor new products to judge how well they meet the needs of Montana libraries. Time frame: February 2002 - March 2002. January 2004 - February 2004. Research quality databases that are free or broker licenses to those of interest to types of libraries and add links to MLN gateway. Time frame: Ongoing.

Evaluation: MSL was successful at securing state funding for online magazine databases. MLN led the RFP process and the selection of a vendor for the 2004-05-license period. MLN has also led the process at identifying another online resource, automobile repair database, of interest to the majority of libraries and arranging for a license.

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Secure funding for additional licenses: Develop and implement a funding plan for the 2003 and 2005 legislatures. Time frame: February 2002 - April 2003. February 2004 - April 2005.

Evaluation: See above.

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Build library participation: Recruit libraries; ensure technical resources to access licensed databases. Provide statewide press releases and templates for local libraries to use. Time Frame: Ongoing.

Provide training: Offer a workshop on how to promote and instruct users in the use of the online products at one statewide venue each year. Post "Frequently Asked Questions" pages on MLN regarding products. Time frame: Ongoing.

Evaluation: MLN arranged the training.

Continue to broker and manage the OCLC statewide license. Time frame: 2003 -2004.

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Evaluation: See above.

Continue to purchase MLN Gateway access to WorldCat for all Montana libraries. Time frame: Ongoing.

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Evaluation: See above.

Continue funding statewide BCR membership to aid Montana libraries with their purchase of content, training, and supplies. Promote appropriate BCR services to Montana libraries. Time frame: Ongoing.

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Evaluation: We need to expand our promotion of BCR services to Montana libraries.

Continue to improve resource sharing among Montana libraries, which may include changes to the current interlibrary loan program. Work with established groups such as the Montana Library Association Interlibrary Loan Interest Group (ILL) to develop new ILL procedures. Time frame: 2002-2004.

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Evaluation: MLN participated in a group to study the state's reimbursements to libraries for ILL loans. A few changes were made from this effort.

All Montana citizens will have access to a customized portal to quality networked library resources. The portal will give citizens a core collection of electronic resources and provide access to readers' advisory and reference services. Design and implement plan; seek funding and implement. Time frame: 2002-2007.

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**Issue 7: Montana citizens do not have consistent access to standards-based, networked, information infrastructure through their libraries.**

**Needs Assessment Summary:** In 2000, almost half (35) of Montana's public libraries have dial-up connections to the Internet (another 40 have dedicated access, four have no access). Dial-up connections are inconvenient and offer slow and inconsistent access to online information resources. The Evaluation recommended that MSL continue to monitor connectivity and consider ways in which LSTA dollars can be used to ensure that all public libraries have dedicated, high-speed Internet connects.

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Currently, Montana has five shared-catalog cooperatives. One of these, called the Montana Shared Catalog, is the result of a cooperative promoted by MSL and partially funded by LSTA. Implementation of the catalog is scheduled for 2003. The Montana University System is discussing options for developing a shared catalog and is considering the needs of other types of libraries.

**\*Goal #16:** Montana citizens can easily access the holdings of all Montana and OCLC libraries and online electronic resources through their libraries.

**LSTA Purpose:** Establishing or enhancing electronic linkages among or between libraries; and encouraging libraries in different areas, and encouraging different types of libraries, to establish consortia and share resources.

**Key Output Targets:**

1. By 2007, all Montana public libraries will have sufficient, reliable, and affordable access to the Internet.
2. MLN will continue to work with others, such as the University System and other standards-based shared catalog systems, to provide access to Montana-relevant bibliographic resources.
3. By 2005, all public and academic libraries will participate in the OCLC statewide contract. The participation of school libraries will increase by 5% per year. The participation of special libraries will remain the same.

**Key Outcome Target:** The people of Montana will know and use the electronic information sources available through their communities' libraries.

**Programs:**

Continue to provide access to a variety of Montana libraries' catalogs and certain online databases via the MLN Gateway. This program may include migrating Site Search functions to iBistro. Time frame: next five years.

Evaluation: Montana libraries use the MLN Gateway to search other catalogs.

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Assist public libraries with inadequate Internet connections. Establish a competitive grant program linked to e-rate recipients with an established library data communications plan, targeting three to five libraries for data communications demonstration projects. Time frame: 2003 and ongoing.

Evaluation: Using Gates Foundation funds, MSL will do so in 2004.

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Continue to encourage libraries to participate in the e-rate program. Time frame: Ongoing.

Work with libraries and a variety of Montana Internet Services providers to plan for libraries' current and anticipated communications needs. Time frame: 2003 and ongoing.

Evaluation: LDD promoted the e-rate program to libraries and assisted them with the process.

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LDD provided information on the implications of the CIPA decision on the E-Rate program. Continue to promote the development of the shared Montana catalog and any other standards based, integrated library systems. Offer LSTA funding to libraries in the South Central and Sagebrush federation in 2002 and 2003. Evaluate continued funding of participation in the shared

Montana Catalog. Continue to work with the governing body of the shared Montana catalog to promote development and substantial policies and procedures and participation in the cooperative. Time frame: Ongoing.

Evaluation: The Montana Shared Catalog (MSC) has been a successful project for MLN. The MSC has 23 members and is expected to grow as LSTA funds are available to pay for start-up costs. The MSC has adopted a business plan.

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MSL will continue to work with other institutions to promote the development of a statewide catalog and/or the development of robust individual catalogs that can be easily accessed and used by all Montana citizens. Time frame: Ongoing.

Evaluation: MLN continues to promote participation in the MSC and the development of standards based individual catalogs.

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**Issue 8: Montana library staff members do not have access to reliable and or convenient technical support.**

**Needs Assessment Summary:** During the planning meetings held statewide, a number of participants identified lack of technical support as a major issue. Anecdotally, LDD staff members know that many libraries do not have technical assistance in their community. To fill this gap, LDD staff members receive many calls from library staff that request technical assistance. MSL's role is to provide easy to use access to technical information and to build the knowledge, skills, and abilities of library staff.

**\*Goal #17:** Montana citizens and students will have dependable access to electronic information services at their libraries by the end of 2007.

**LSTA Purpose:** Assisting libraries in accessing information through electronic resources and encouraging libraries in different areas, and different types of libraries to establish consortias and share resources.

**Key Output Targets:**

1. Technology librarians report a decrease of 25% of calls regarding technical assistance by 2007.
2. Library staff from 50% of all Montana libraries uses the online expert file and the MLN produced FAQs by 2007.

Key Outcome Target: Public library patrons surveyed report that their libraries offer reliable and adequate access to electronic information and other resources.

**Programs:**

Develop an expert file regarding technical assistance. Identify experts in pertinent subject areas and their willingness to share their expertise with others. Develop an interactive database by the end of 2002. Promote, monitor, and evaluate use.

Evaluation: Not done. LDD is reviewing the use of OCLC's Webjunction to provide online technical assistance.

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Develop a web-based, technical assistance program, including FAQs. Identify areas of need and develop FAQs and/or links to existing materials by the end of 2002. Promote, monitor, and evaluate use. Developed/ongoing editing and revising

Provide training. In 2002, MSL will offer three shorter summer institutes, which will include comprehensive training on network troubleshooting. MSL's annual fall workshop will continue to offer practical training on workstation and network maintenance. Evaluation: Sponsored three

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Gates summer institutes dedicated to networking technology and troubleshooting.

### **Issue 9: Montana public library buildings are inadequate to provide quality library services.**

**Needs Assessment Summary:** Federation planning meeting participants gave this issue a medium priority. Although MSL has not inventoried building needs, MSL staff members who travel to public libraries report that each public library building in Montana is deficient in some area. Although the focus of the needs assessment and workshops will be public libraries, MSL will make the information about building assessments available to all libraries.

**\*Goal #18:** Montana citizens, local and state government officials, legislators, library staff members, and trustees will have accurate and current information about the condition of Montana's public libraries buildings by the beginning of 2004. They will use this information to determine state and local solutions to problems identified.

**LSTA Purpose:** Paying costs for libraries to acquire or share computer systems and telecommunications technologies; and targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line.

#### **Key Output Targets:**

1. By March 2003, 85% of all public libraries will have completed a building survey.
2. By 2006, 50% of all public libraries that have inadequate facilities will have building program plans.

Key Outcome Targets: Public libraries that have inadequate facilities will report improvements in their building condition.

**Programs:**

Design, distribute, analyze, and publish a building condition survey by May 2003. MSL will make six presentations on how to complete the survey at federation meetings in Fall 2002. MSL will use its online capability to post the survey online.

Provide training to public librarians and trustees on writing a building plan, through workshops in 2004 and 2005.

Provide bibliographies to librarians and trustees on building design, remodeling, and planning.

Time frame: September 2002 and updated annually.