

# PLAN OF SERVICE AND BUDGET REQUEST FOR JULY 2005 THROUGH JUNE 2006

**NAME OF FEDERATION:**     Broad Valleys Federation    

LISTING OF Area Libraries who participate in Federation events and have expressed commitment to federation membership via written or spoken contract and/or memo of understanding:

Belgrade Community Library  
Bozeman Public Library  
Broadwater School and Community Library, Townsend  
Butte-Silver Bow Public Library  
Dillon Public Library  
Drummond School Community Library  
Hearst Free Library, Anaconda  
Jefferson County Library System, Clancy, Boulder and Whitehall  
Lewis and Clark Library, Helena  
Livingston-Park County Library  
Madison Valley Public Library, Ennis  
Manhattan Community Library  
Meagher County/City Library, White Sulphur  
Philipsburg Public Library  
Sheridan Public Library  
Thompson-Hickman County Library, Virginia City  
Three Forks Community Library  
Twin Bridges Public Library  
William K. Kohrs Memorial Library, Deer Lodge  
West Yellowstone Public Library

## **LONG RANGE GOAL OF FEDERATION AREA:**

**Summarize the goals of the federation. For each goal give a statement of need, why is the goal important to the federation?**

**Statement of need:** The Broad Valleys Federation libraries are a collection of unique and diverse libraries each having special needs, concerns, and challenges. Funds from the Federation grants are meant to address and assist in meeting these special needs and the Federation grants to members are not meant to nor should they be used to supplant local library revenues or to diminish local library support to Federation Libraries.

- (1) The Broad Valleys Federation of Libraries will share the information, knowledge and resources available to the Federation and to encourage networking and consensus building.
- (2) The Broad Valleys Federation of Libraries will distribute state monies widely in order to strengthen the Federation structure, encourage continuing education for librarians and trustees, and to provide excellent library services to Montana citizens.
- (3) The Broad Valleys Federation of Libraries will cooperatively provide electronic access to library materials and information to patrons of the member libraries.

## **ADMINISTRATIVE COSTS:**

**1. If the current administrative rule changes are not passed, the following items are considered to be a cost of administering a federation and are allowable as administrative costs (can not represent more then 15% of total budget):**

Accounting	Audit Service	Building Costs and Management	Central Stores
Clerical Support	Legal Expenses	Mail Sorting and Delivery	Payroll Preparation

Miscellaneous Costs passed on from fiscal agent, including but not limited to:  
Administrative and Governing Body charges                      Postage (central administration only)  
Courier Services    Central Word Processing  
Equipment Depreciation

**2. If the current administrative rule changes are passed and certain administrative functions are centralized at the State Library, Federation members may want to authorize a stipend (of not more then \$1,000) to the federation coordinator or designated person who is willing to work with the State Library and Federation membership to plan meeting agendas, set up meetings, and do the appropriate plan of service and annual report preparation and filing.**

Broad Valleys Federation of Libraries will provide to the Lewis and Clark Library a stipend of \$800, which will be used to defray the costs of coordination of the Federation activities.

**REVENUE SUMMARY:**

	<b>Budgeted</b>
<b>CST Revenue</b>	33,580
<b>General Fund</b>	
<b>TOTAL Revenue</b>	\$33,580

**BUDGET SUMMARY:**

EXPENDITURE	CST	STATE GENERAL FUND
<b>Administration Costs</b>	800	
Salaries/Wages or stipend		
Indirect Administrative Costs		
<b>Operating Costs</b>		
Supplies		
Communications (phone, mailings, printing)		
Equipment		
<b>Program one: Annual Meeting</b>		
Meals/Lodging/Mileage	4,250	
Tuition/Registration		
Curriculum Materials		
Other Meeting Expenses [please specify]		
<b>Program two: Continuing Education Grants</b>	8,000	
<b>Program three: - Technology</b>	20,530	
<b>Program four:</b>		
<b>TOTAL EXPENDITURES</b>	<b>\$33,580</b>	<b>\$</b>

**PROGRAM SUMMARY:** [fill out this form for each program included in the Plan of Service]

**Program Name and Number:** \_\_\_\_\_ 1 – Continuing Education \_\_\_\_\_

**PROGRAM NARRATIVE**

- Identify which goal this program supports
- Describe how the program will be carried out. Include personnel, materials, program activities and travel.

This program supports Goals #1 and #2 of the Broad Valleys Federation.

**Annual Meeting** - One 2-day meeting will be held annually in a location within the boundaries of the Federation.

- Each library will receive \$37.50 to help defray travel costs to the meeting.
- The Lewis & Clark Library will coordinate and pay for the costs of lodging, meals and continuing education presentations. The Lewis & Clark Library will receive \$3,500 to pay for this service.

**Continuing Education Grant** - Each library will receive a direct grant of \$400 to be used to provide continuing education to librarians and trustees, at the discretion of each individual library.

**PROGRAM EVALUATION:**

- Explain how will you judge that the program is successful.

Member libraries will specify how this training helped the library better serve its patrons. Federation members may be asked to share their expertise at various federation meetings and will share their knowledge with other librarians and trustees at their home library. Brief written reports will be provided for the annual report of the Plan of Service document.

**Program budget detail**

Please see above.

**Total Program Budget \$**\_\_12,250\_\_\_\_\_

PROGRAM SUMMARY: [fill out this form for each program included in the Plan of Service]

Program Name and Number: 2 - Technology

## PROGRAM NARRATIVE

- Identify which goal this program supports
- Describe how the program will be carried out. Include personnel, materials, program activities and travel.

**This program supports Goal #3 of the Broad Valleys Federation.**

At the Federation's annual meeting in March of 2005, a Plan of Service was approved which earmarked \$389.50 per library to be used to help pay for technology and that any monies received over the baseline budget of \$20,840 would be dedicated to technology grants and evenly divided among the libraries. In April we were notified that an additional \$12,740 would be available to the Broad Valleys Federation in FY2006. Federation members were notified of this in an email (text below) and ideas were solicited.

I have just received official word that the Broad Valleys Federation will receive \$12,740 MORE than we budgeted for in FY06! This is great news and wholly unprecedented!!!

The Plan of Service we approved at the meeting in Philipsburg in March stated that any additional monies received would be equally divided between the 20 libraries and under the category "technology grants." This new infusion would increase our technology grants from \$389.50 per library to \$1,026.50 per library. This is all well and good and I know everyone can always use more money in the tech area but I'd like to call for a discussion on the highest and best use of \$12,740. Is there a project we could do cooperatively that would strengthen services on a federation-wide level?

Some of the State Library's goals:

MSL LRP GOAL 1: All Montana citizens will have direct access to information through telecommunications at their libraries.

MSL LRP GOAL 2: Montana citizens will have timely access to information despite its location or format.

MSL LRP GOAL 3: Montana citizens will be served by librarians and trustees who are knowledgeable about all aspects of library service.

MSL LRP GOAL 4: Montana citizens will know about and value the range of services provided by libraries.

MSL LRP GOAL 5: MSL, with federations and local library agencies, will provide leadership to assure that Montana citizens receive excellent library services.

So the question becomes: Is there a cooperative project that could be funded with the Broad Valleys Federation's additional \$12,740 that you think could better serve the Federation as a whole than 20 individual grants of \$637?

I would like your thoughts on this ASAP but no later than May 20 - our FY2006 budget is due to the State Library on May 23, 2005.

Thanks much!

Becky

Four out of 5 responses indicated they would be interested in a cooperative project such as:

- OCLC, InfoTrac or Montana Shared Catalog “scholarships:”
- Collective purchase of software such as “pop-up blockers;”
- Collective purchase of downloadable audio books;
- Collective purchase of books for library sponsored book groups;
- Form partnerships and use the money to defray the costs of shipping books between partner libraries.

However, with such a small response (5 out of 20 libraries, or 25%) it has been deemed prudent to continue with the Plan adopted by the member libraries at the March 12-13, 2005 meeting. The monies can be used for the above mentioned projects by individual libraries or in partnerships between two or more BVF libraries.

Monies will be used for technology related expenses. Emphasis will be on technology that strengthens federation-wide access. Additional emphasis will be on federation wide resource sharing and document delivery. Monies received in this category will be expended for such things as hardware, software, OCLC expenditures, statewide database expenditures, virtual reference, and shared catalog expenses.

### **PROGRAM EVALUATION:**

- Explain how will you judge that the program is successful.

Member libraries will identify what expenses were covered and identify how this helps the library deliver technology related services to its patrons and how the expenditures help strengthen federation-wide access.

### **Program budget detail:**

Each Broad Valleys Federation library will receive a grant of \$1,026.50 in FY2006 to help defray the library’s technology expenses.

**Total Program Budget \$** 20,530

**PROGRAM SUMMARY:** [fill out this form for each program included in the Plan of Service]



Member Library	Amount of Grant to member library	Program(s) funded for member library
Belgrade	1,464	1, 2, & 3
Bozeman	1,464	1, 2, & 3
Broadwater S & C	1,464	1, 2, & 3
Butte-Silver Bow	1,464	1, 2, & 3
Dillon	1,464	1, 2, & 3
Drummond	1,464	1, 2, & 3
Hearst Free, Anaconda	1,464	1, 2, & 3
Jefferson Co.	1,464	1, 2, & 3
Lewis & Clark Library	5,764	1, 2, & 3 & Admin
Livingston-Park Co.	1,464	1, 2, & 3
Madison Valley, Ennis	1,464	1, 2, & 3
Manhattan	1,464	1, 2, & 3
Meagher Co. White Sulphur Springs	1,464	1, 2, & 3
Philipsburg	1,464	1, 2, & 3
Sheridan	1,464	1, 2, & 3
Thompson Hickman, Virginia City	1,464	1, 2, & 3
Three Forks	1,464	1, 2, & 3
Twin Bridges	1,464	1, 2, & 3
Kohrs Memorial, Deer Lodge	1,464	1, 2, & 3
West Yellowstone	1,464	1, 2, & 3
<b>TOTAL</b>	<b>\$33,580</b>	

This plan of service was approved by the membership on  
\_\_\_\_ March 12, 2005 \_\_\_\_\_ (date).

If the administrative rule changes do not pass, We certify that the federation funds are being maintained in a separate account from the headquarters library funds.

Federation Coordinator's:

\_\_\_\_ *Rebecca W. Foster* \_\_\_\_\_ Date \_\_\_\_ *5/25/2005* \_\_\_\_

Federation Advisory Board Chairperson:

\_\_\_\_ *Alan S. Kesselheim* \_\_\_\_\_ Date \_\_\_\_ *5/26/2005* \_\_\_\_

Chairperson, Board of Trustees,  
Headquarters Library

\_\_\_\_ *Joan Bishop* \_\_\_\_\_ Date \_\_\_\_ *5/25/2005* \_\_\_\_