

## Memorandum

TO: David Ewer, Budget Director

FROM: Darlene Staffeldt, State Librarian  
Montana State Library  
*Darlene Staffeldt*

DATE: April 29, 2008

RE: Your memo of April 25, 2008

We appreciate receiving your correspondence dated April 25, 2008 regarding our strategic plan related to digitization and are happy to provide answers to the questions you posed.

First, permit me to confirm your understanding of the document titled "*Montana State Publications Digitization Project Plan*." This document is a working paper written to document research and procedures specifically related to digitization of state publications and to record the outcome of our initial digitization pilot. It was submitted to ITSD in support of the ITPR for digitization services dated March 26, 2008 as is required per questions 13 and 17 of the ITPR. It is important to understand that our desire to digitize our legacy print collection in no way implies that we intend to decrease or eliminate walk-in services. We have heard from our users that walk-in service is highly valued and we have therefore revised our transition plan to reflect the need to continue this service.

These revisions and the larger overall plan to which you refer are presented in our "*Digital Library Transition Plan Revised Draft*" dated January 10, 2008. This document was emailed to Jan Lombardi and Sarah Elliott on February 28, 2008 for review and approval along with a draft user survey and press release. As I answer your questions below, I will refer to this document and to the Montana State Library Strategic Plan 2006-2011 that was approved by the Montana State Library Commission on August 15, 2006.

- 1) **After all current documents have been digitized, what is the MSL's long term intention for receiving, storing, distributing hard copy materials such as books, publications, magazines, newspapers?** Montana Code Annotated 22-1-212 mandates that "The state library shall administer a state publications depository library program to identify, acquire, catalog, preserve, and provide access to state publications." Hence, MSL will continue to manage all print state publications submitted by Montana state agencies. (Please note that the majority of state publications are now born digital.) Our commitment to providing permanent public access to all state publications means that we will continue to request, catalog and distribute the print publications we receive to all depository libraries that choose to receive print publications. Print state publications submitted by state agencies will be preserved and made publicly available by the Montana Historical Society. MSL will provide permanent public access to the digitized and born digital state publications. This relationship was defined in a Memorandum of

Understanding between MHS and MSL dated March 27, 2008 and submitted to Hal Harper of the Governor's Office on April 22, 2008.

As stated in the *Digital Library Transition Plan Revised Draft*, MSL will encourage the use of digital content as appropriate, but will continue to provide access to print information when digital versions are not available. In other words, when MSL staff identifies Montana-related natural resource information, professional library development information, and reference information that should be included in our collection and if that information cannot be made available digitally, MSL will collect and provide access to that information in print form either through books or journals. And, in the case of newspapers, MSL will continue to provide access to print papers.

It is also important to note that, while MSL remains committed to providing print access to certain forms of information when that information is not currently available digitally, we as a library must continue to follow good library policies. This includes evaluating use statistics for print and online resources and using this information to evaluate whether or not to continue to provide access to that content. We must also weed our collections as necessary based on collection use. These policies ensure that MSL collections are well managed and that financial and space resources are used appropriately to ensure that our users' information needs are met. Further information regarding the goals and objectives of the State Library can be found in the Montana State Library Strategic Plan 2006-2011 as well as in the Library's collection development policy.

- 2) **Questions around Physical Access to the State Library:** With regards to physical access to the State Library per sections *II. Library Services* and *III. Public Access* of the *Digital Library Transition Plan Revised Draft*
- a. **What is the MSL's plan for hours open to the physical, on-site access to MSL?** MSL will remain open to walk-in access Monday through Friday from 8:00 a.m. to 5:00 p.m.
  - b. **What changes in physical vs. digital access can the walk-in library user expect once digitization is underway and when completed?** Walk-in patrons should expect little change in access to the print collection or in services provided. Open access to library stacks will continue; access to print newspapers will continue; access to print journals not available online will continue; MSL will continue to provide public access computers; and patrons will still have access to in-person reference service.

Patrons should also expect increased access to digital content as more and more state publications and other library resources are made available online. This means that patrons will be able to access the resources they need anywhere – whether they are in the State Library building, out in the field, or working from a desktop in Glendive. The State Library will promote our digital collection through our web site for off-site patrons; walk-in patrons will have access to the digital collection through public access computers. Additionally, those patrons requesting digital copies of state publications currently only available in print will have the opportunity to request scan-on-demand services.

Once digitization of state publications is completed, patrons who need state publications will be directed to the online versions of those publications. From the library or from their desks, those publications may be downloaded, saved, emailed, or printed by patrons. Those patrons who need to view the print version of state publications will be referred to the Montana Historical Society.

We have no plans to digitize other portions of the collection. Access to information in the non-digitized collection will continue in the form of print circulation and interlibrary loan.

- c. **What is the plan for availability and use of physical documents such as books, magazines, newspapers, to-day, and in the future?** As per section *I. Library Collection* of the *Digital Library Transition Plan Revised Draft*, MSL will continue to subscribe and provide access to print newspapers. MSL prefers to provide access to other information in digital form because over half of our patron base (state employees) does not live and work in Helena. Therefore, we intend to increase access to online journals and databases and to decrease spending on print content. However, when information needed for the MSL collection is not available in digital form, as is currently the case with the professional library development collection, the collection will be supplemented with print. This print may be in the form of books and journals.
- d. **What is the short-term and long-term plan for access to the stacks?** As per section *III. Public Access, E. Stacks* of the *Digital Library Transition Plan Revised Draft* access to the stacks will continue into the foreseeable future. Emphasis will be placed on weeding and cataloging these collections to improve accessibility to print content. As state publications are digitized, patrons will be referred to online sources.
- e. **What is the plan for physical use of material and in what format will digitized documents be available: facsimile?** As per sections *II. Library Services A. Circulation Services* and *B. Interlibrary Loan* of the *Digital Library Transition Plan Revised Draft*, use of print material will continue through circulation and interlibrary loan. Or, for print state publications, patrons will be given the option of using scan-on-demand services. Digitized documents are available in PDF format. These documents can be downloaded, saved, emailed, and/or printed by patrons. Once digitized, the print state publications will be transferred and available for use at the Montana Historical Society.
- f. **What access is available for currently digitized material?** Born digital state publications and digitized legacy print state publications are currently available in PDF format through freely available online library catalogs and web sites. This includes the Montana State Library catalog (a part of the Montana Shared Catalog), WorldCat, the Montana Memory Project State Publications Collection, and the Internet Archive web site which is also indexed by Google.

Other licensed digital content, including online journals and databases, is accessible through the MSL web site.

- g. **What are the access plans to non-digitized material?** Plans for access to non-digitized items are addressed in the *Digital Library Transition Plan Revised Draft* and are further described above. Again, MSL will continue to provide physical access (i.e. circulation and interlibrary loan) to print material in the collection. MSL also offers scan-on-demand services for patrons who would like digital copies of state publications currently available only in print.
- h. **What are changes in staff and physical space to meet on site and off-site for users?** Based on the decision to continue walk-in service, no staff changes are planned for on-site users. Users will continue to receive in-person reference and circulation services. Staff time will also be spent on projects that increase awareness of new online services. As an example, existing staff will create online tutorials (screen casts) on how to use online journals and databases. As more and more patrons are able to find the information they need online this may result in a natural shift in staff resources though this remains to be seen. Finally, MSL is requesting funding through the EPP process for one-time only monies to complete the digitization of the legacy print state publications collection. Included in this request is funding for two contract staff to support this project. Changes in physical space are described below.

- i. **Do you plan to increase or decrease space for on-site users?** As per section *III. Public Access A. Public Reading Area* of the *Digital Library Transition Plan Revised Draft*, in order to support the physical organization and movement of state publications to and from the scanning center, MSL may need to carve out a small amount of space as a work center. Though no decisions have been made, one idea is to turn the far west end of the reading area into a work zone. The space would be open and visible by patrons, to allow them to witness the process of transitioning print resources to a more digital environment. Involving patrons in the process would educate them about newly available digital information and could work to generate excitement about Montana taking a leadership role in the digitization of a library collection to provide better access to patrons.

To offset this loss of space, more space will be available for users as more print state publications are transferred to the Montana Historical Society.

In order to accommodate this shift, some furniture and public access computers would be shifted to the near end of the reading area. This offers the added benefit of better service to patrons because staff will be closer at hand.

- j. **Do you plan changes in sitting areas and computer stations?** As per section *III. Public Access B. Public Access Computers* of the *Digital Library Transition Plan Revised Draft* we have found a need for one or two short-term use public access computers. These computers would be available to patrons for a 15-minute time limit and would accommodate the needs of patrons who simply wish to look up quickly-identifiable MSL resources or to check email. Our current one-hour limit is often abused, meaning that some patrons are turned away. A short-term use computer would better serve these patrons. Depending on hardware availability, these computers would either come from existing, unused desktops or, if unused desktops are unavailable, from existing public access computers.

Some furniture and computers may be rearranged so that staff can better monitor their use. No other changes are planned for the sitting area.

- 3) **Data Center Issues: How does MSL plan to migrate from its current independent data center into the State's new secure centralized data centers?** MSL is currently developing plans to transition our SAN to the State's new centralized data center. The SAN comes out of warranty at the end of June. Rather than spend valuable money and staff resources on new hardware, MSL worked with Dell to extend the warranty on the existing hardware. This will serve as a stop-gap measure until the new center is available.

Additionally, MSL staff is currently working with an ITSD project team to implement a distributed archival system for digital masters created during the digitization of state publications. This system is known as LOCKSS (Lots of Copies Keep Stuff Safe) and was developed and is currently supported by staff from Stanford University Libraries. We have had two meetings with the ITSD project team to answer questions related to the implementation LOCKSS and we are currently awaiting a cost proposal from ITSD for a hosted LOCKSS system. We recognize that in the near future, the MSL data center will transition to the new State data center.

- 4) **Budget Considerations: Does MSL intend to shift resources so that a walk-in user will find a different level or type of customer service?** Walk-in patrons will continue to receive the same high level and type of customer service they already receive. Rather than shifting resources away from this service, MSL digitization efforts will proceed at a slower pace. If MSL successfully secures one-time only funds for digitization, new contract staff would be hired to support this project. Staff will not be shifted away from current walk-in services.

- 5) **What is the communication plan to query and or notify state agencies and the public of MSL changes?** Public outreach is a critical component to the success of the digital library. Over the winter MSL developed a communication plan that reaches out to state employees, agency directors, public patrons and the media. MSL developed a user survey that was sent to Jan Lombardi and Sarah Elliott on February 28, 2008 for review and approval. This survey will gather information to measure how much users value walk-in and online library services.

MSL plans to issue press releases to promote widely accessible online content and information tools. One of these press releases was also sent to Jan Lombardi and Sarah Elliott on February 28, 2008. To generate excitement for this news among the media, MSL plans to invite the media to an open house for in person demonstrations.

Most important, though, is outreach to our primary users, state employees. MSL staff communicates with agency PIOs to keep them informed of all new services. MSL staff also attends all New Employee Orientations offered by the Professional Development Center to educate new employees about the services available through the library. More trainings will regularly be offered both on and offline to encourage use of library resources.

Finally, MSL staff will survey state agencies to discover more state publications for digitization than are already available in the legacy print collection.

In conclusion, we fully agree with the need (and it has always been the intent of the State Library) to provide the highest levels of service and the widest possible access to all library content. Technology makes possible our goal to provide access to our collection in every corner of the state at any time of the day or night as we had only imagined just a few years ago. Digitizing our collection will substantially increase access to Montana state government information for all our patrons, and in particular the 53% of state employees in 81 communities, and the 900,000 other Montanans who live and work outside of the Helena area. Our plans to digitize the legacy print state publications collection will make our collection accessible to everyone.

There is much to be gained by digitizing this collection. As we have said before, a digitized state publications collection will provide all Montana citizens with equal and unprecedented access to information about their state government. Few states that we are aware of have taken this step and made the resources available to digitize their entire state publications collection. Montana is a true leader in this regard.

This project was approved by the Commission of the Montana State Library. We need to move forward now to begin to make the digitization project a reality. We ask that you release the digitization contract so that we might proceed.