

## Statewide Library Resources (SLR-LD) Report February and March 2015

Prepared for the April 8, 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 Reymer.

### Goal One—Content

1. 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:

- Develop and articulate a method and schedule for collecting and evaluating statistics on content provided through SLR LD projects to better understand that content's effectiveness and usage. (*Lead staff: Cara Orban, Jo Flick*)
- Develop and promote the e-content expansion pilot and encourage Montana libraries to contribute or provide referrals to locally created content. This effort will benefit library patrons by providing unique, local works of fiction and non-fiction and enable participating libraries to build e-content collections independent of third party providers. (*Lead staff: Cara Orban*)
- Evaluate ongoing costs, funding opportunities and storage options for CONTENTdm that meets current and future storage needs, putting the Montana Memory Project in a strong position for future growth. CONTENTdm is the digital content management system administered by OCLC that is used by MMP contributors to upload digitized materials and create metadata for those materials. (*Jennifer Birnel*)

- Launch a new MSC EBSCO Host e-book collection, offering another accessible e-book collection to all MSC library patrons. *(Lead staff: Ken Adams, Mike Price)*
- Discuss with libraries the option of adding additional content to the DiscoverIT collection of resources and negotiate with EBSCO to lower the cost of adding individual subscriptions and content repositories to DiscoverIt. Continuing to expand the resources available in this statewide integrated discovery tool will make it an even more effective, one stop search tool that Montana librarians envisioned and have requested over the last decade. *(Lead staff: Cara Orban)*

**(Originally reported February 2015)** The Network Advisory Council met December 18 and voted to accept EBSCO's offer to add resources (Home Improvement Reference Center and Hobbies & Crafts Reference Center) and upgrades (Literary Reference Center Plus, MAS Complete, MasterFILE Complete) to the statewide suite of online research databases with no change to the current contract cost, by extending MSL's contract with a second renewal through August 31, 2017. All other terms of the contract will remain in place. This recommendation delays the Request for Proposal process for the primary suite of statewide databases for another two years, and allows SLR staff to continue training and outreach to libraries for these existing resources, through the Discover It search tool.

**(Update: April 2015)** Orban worked with EBSCO Support staff in February and March to prepare new interfaces and resources for all Montana libraries: Explora, Hobbies & Crafts Reference Center, Home Improvement Reference Center, Literary Reference Center Plus, MAS Complete, and MasterFILE Complete. These new and upgraded resources are included as part of MSL's FY16-17 renewal with EBSCO at no additional cost.

**(Update: April 2015)** In order to help the Network Advisory Council make a decision about the use of remaining state FY15 Coal Severance Tax funds, Orban gathered information on access, content, and statistics for three different sets of online resources: EBSCO Research Databases, Safari Tech, and Tutor.com. This information and ensuing discussion led to the NAC's decision to approve these one-time purchases, effective immediately:

- \$15,500 for 2,000 additional tutoring sessions, available to all Montana library users
- \$8,858 for additional Safari Tech SU, slots for MT library staff and state agency staff
- \$5,642 for additional EBSCO ebooks for public library user access

- Identify 4-6 communities 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. *(Jennifer Birnel, Pam Henley)*

**(Originally reported February 2015)** The Montana Memory Project was invited by the Mountain West Digital Library and the Digital Public Library of America to participate in the [Public Library Partnerships Project](#) funded by the Bill and Melinda Gates Foundation. This project provided digital skills training for librarians including digitizing, describing and exhibiting their cultural heritage materials online through DPLA exhibitions. Six of the twelve participants were able to prepare collections in the short turn around time of one month and sent their items in December to the vendor to be digitized.

**(Update: April 2015)** Four of these projects are now published in the MMP:

- Hobson Community Library - Early Agriculture and Homesteading in Judith Basin County
  - Judith Basin County Free Library - Sheep Ranching in Judith Basin County
  - Billings Public Library - Billings Images of People and Images of Events
  - Roundup School Community Library - Musselshell Valley Historical Photographs
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- 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. *(Jennifer Birnel)*

**(Update: April 2015)** Birnel and Yeager met with Historical Society Staff to further develop this effort and to add to the lesson plans now available in the MMP.

## **Goal Two—Access**

2. 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:

- Evaluate how the SLR portal is presented in the overall MSL site by informal conversations with Montana library staff and as part of regular trainings on the portal, to provide a truly helpful, easily navigable web resource for library development. *(All staff)*
- Carry out usability testing by Montana library staff on the SLR web pages to better understand areas that need improvement or changes in design. *(Lead staff: Cara Orban)*
- Create a regular schedule of analyzing usage of all SLR pages, and using Google Analytics. *(Lead staff: Cara Orban)*
- Working with the MSL Marketing Coordinator, update the "For the Public" website (<http://mymontanalibrary.org/>). New content and links will include access to community resources and resources that celebrate services provided by libraries. *(Lead staff: Lauren McMullen, Cara Orban)*

**(Update: April 2015)** Sara Groves, McMullen, Orban and McHugh identified primary sections that would make up the new My Montana Library site: 1.) access to library services and content; 2.) library-community partnerships and 3.) Montana's unique literary and cultural resources. Next steps are to create mock up web pages showing the structure and content suggested for each section.

- Working with the MSL Marketing Coordinator, budget for and implement innovative and effective promotional materials that best publicize the statewide resources available through DiscoverIt. *(Cara Orban, Jennifer Birnel, Ken Adams, Jo Flick)*

**(Update: April 2015)** Groves and Orban have identified specific databases that are easily promoted through radio spots and social media. A simple prototype of a small

card that users could keep in their wallet with links to Discover It, and simple authentication information is also being developed.

- Optimize the use of our central user authentication software, EZproxy, within Discover It, MontanaLibrary2Go Local and other potential projects by improving instructions in the Library Directory, raising awareness of EZproxy among MSL staff, and providing online and in-person training opportunities for library staff. The benefit to the Montana library user is a single, one-time authentication process when accessing resources outside of the user's local library (*Cara Orban, Mike Price, Ken Adams*)

**(Originally reported December 2014)** Liaison partnerships have been developed with the purpose of providing more focused training and outreach by library type for searching and customizing the Discover It integrated search tool for their own library. Discover It is the EBSCO Integrated Discovery Service (EDS), which is a product of EBSCO. The Statewide Projects Librarian will continue to focus on proactive promotion to all library types; contract administration and communication with EBSCO and content partners; integration of new content or individual subscriptions on behalf of libraries; in depth assistance to libraries that want to customize Discover It by creating system profiles just for their library users; assistance with authentication setup; preparing and organizing focus groups and surveys; collecting and analyzing usage statistics; and working with the Statewide Trainer to determine training needs and organizing learning opportunities. Liaisons are asked to help disseminate information about Discover It to colleagues where appropriate; assist with basic customization questions; help increase awareness of available information about Discover It and EBSCO statewide resources within the Library Directory and on the Learning Portal; advise on creation and improvement of instructional or promotional materials; and assist with efforts such as formal training, surveys, and focus groups.

**(Update: April 2015)** Orban worked with Henley and Electronic Resources Librarian (LIS division) Alana Mueller-Brunckhorst in March to revise Discover It and EZproxy instructional resources, which are now available through the Montana Library Directory in "View Discover It Access" and "View EZproxy Access," and the Learning Portal. This information is made available to Montana library staff in order to simplify and provide greater clarity to those resources so that they can be used in Discover It liaison outreach and training.

- Investigate the potential of a centralized RFP process for at least some pieces of the E-rate program to see if this would be more cost effective for participating libraries. (*Suzanne Reymer*)
- Investigate the possibility of a central approach for completing and submitting Form 470, a form used to facilitate the competitive bidding process required for an e-rate

application, to see if there are cost and time benefits to participating libraries.  
(*Suzanne Reymer*)

- Investigate and test returning to a local instance of CONTENTdm for the MMP, which could speed up search results and download times for end users across the state. (*Jennifer Birnel*)
- Launch an RFI and possibly an RFP process to investigate options for new MMP software in order to learn more about alternatives to CONTENTdm. (*Jennifer Birnel*)

**(Update: April 2015)** Birnel has received eleven responses to an RFI launched in February. A review committee representing the State Library, the Historical Society Research Center, University of Montana Mansfield Library, Montana State University Library and a public library representative from the Lewistown Public Library will assist Birnel in studying these responses.

- Create and implement a cost share formula for a statewide courier contract to provide a more stable, long term, affordable option for a statewide library courier service. (*Cara Orban*)
- Coordinate an RFP process to secure a centralized contract for a statewide courier service. (*Cara Orban*)

**(Originally reported February 2015)** MSL signed a contract with Critelli Couriers, effective January 1, for delivery service to Montana libraries. The cost to participating libraries that sign an agreement with Critelli is \$23 per stop, with a \$2 per stop subsidy applied from FY14 LSTA for courier development. Great Falls Public Library, Havre-Hill County Library, and Montana State University – Northern will take advantage of this discount and join the courier service in February. MSL staff worked with Critelli to gather signed participation forms, and prepared previous year interlibrary loan statistics and new statistics collection procedures to share with Montana Shared Catalog sharing groups and with the Courier Advisory Board. One expected outcome from expanding the service area is that the volume of materials being moved through the courier will increase, lowering the overall cost per item shipped via courier.

**(Update: April 2015)** A courier web page was created in February to provide up-to-date information about the statewide courier contract and the Montana Courier Alliance. The web page, "Montana Courier Alliance," is available on the Statewide Library Resources website, under "Statewide Projects." With the 2015 contract for courier service, the State Library is making an effort to collect more accurate and complete statistics than have been available in recent years. In January, Montana Courier Alliance libraries reported 174 stops and 1102 crates moved to and from libraries. In February, with the addition of drop sites at Great Falls Public Library and Havre-Hill County Library (also serving Montana State University – Northern), libraries reported 188 stops and 1,297 crates moved. Four locations had yet to report their February statistics at the time of writing this report.

- Investigate and educate librarians about OCLC's new discovery system as it becomes available, so that there is understanding among Montana librarians of this additional integrated search tool available at no cost through our OCLC group services. *(Cara Orban, Suzanne Reymer, Pam Henley, Lauren McMullen)*

**(Originally reported December 2014)** Orban met with OCLC staff and attended two hour-long trainings to prepare a strategy for statewide implementation of the new WorldCat Discovery Services, a new end user interface with discovery capabilities which will replace the OCLC FirstSearch software platform. FirstSearch will be discontinued in December 2015.

**(Update: April 2015)** Orban is alerting librarians via the Wired and MSC listservs about upcoming online OCLC trainings and resources. This outreach is being coordinated with OCLC staff.

- Gather data about bandwidth through the public library statistics and the new speed test tool to better inform us on the current situations in libraries. *(Suzanne Reymer)*
- Meet with the appropriate staff of the Montana Telecommunications Association to gain a more in depth understanding of the structure of and technical language used in the telecommunications industry in Montana. This knowledge will be gained in order to more effectively communicate with librarians and participate in high level planning efforts related to broadband. *(Lead staff: Suzanne Reymer)*

**(Originally reported February 2015)** Reymer participated in numerous phone calls and webinars on E-Rate Modernization and the new Form 471. She helped beta test the new online form and provided feedback to the Universal Service Administrative Company about issues and problems, informed Montana librarians of changes that would potentially impact their E-Rate funding during the State Librarian's Webside Chat in December and during a January webinar, and held an additional webinar in January to introduce librarians to the new online Form 471. These efforts continue to ensure that Montana libraries are represented in the national discussions regarding changes to E-Rate and that Montana librarians participating in E-Rate have the most current information about these changes and are trained in the new form.

**(Update: April 2015)** Reymer has been working with 48 public libraries across the state on their E-Rate applications. E-Rate modernization has created changes in the programs and forms which have been challenging to experienced and new applicants. There are several new library directors applying for E-Rate for the first time this year who have required additional assistance.

### **Goal Three – Training**

3. 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:

- Create a training evaluation approach that all LD staff doing training will apply consistently and that is tied to CE, to more effectively and consistently provide training in all areas. *(Lead staff: Jo Flick)*
- Evaluate SLR and vendor provided training through the creation and utilization of standardized evaluation tools that are also tied to CE, so that CE requirements are a consideration in the training evaluation process. *(Lead staff: Jo Flick)*
- Participate in a train the trainer event to improve training skills. *(All staff)*  
**(Update: April 2015)** Flick held a second event for those MSL staff who train, focusing on evaluation methods. An agency wide training evaluation tool is being developed out of this session, so that benchmark training evaluation criteria is consistent for all MSL programs, enabling MSL to identify trends and patterns in the trainings we provide and better track training needs.
- Produce training webinars about library districts so that interested librarians and trustees can easily access essential information about districts, on demand. *(Lauren McMullen, Pam Henley, Suzanne Reymmer, Jo Flick)*



- Develop an MSC plan to address staff turnovers in MSC libraries, particularly schools, to improve communication when there is new staff, reducing gaps in knowledge. *(Ken Adams)*
- Develop a training curriculum for new MSC software and services to ensure that all MSC librarians receive the training needed when there is new software and services. *(Lead staff: Amy Marchwick)*
- Provide short, recorded webinars on the resources available to libraries that enable them to create compelling charts and visual reports drawing from the data in their public library statistics. These recordings will be available for viewing from the Learning Portal at the librarian's convenience. This effort will be undertaken in order to assist libraries in telling their stories to their local funding bodies and communities. *(Suzanne Reymer, Lauren McMullen, Pam Henley, Jo Flick)*
- Evaluate and implement as appropriate ideas coming from the COSLA CE Connector Committee to engage Montana librarians in national CE trends. *(Lead staff: Jo Flick)*

**(Update: April 2015)** The CE Connector project of COSLA is yielding some useful resources for Montana Libraries: a collection of materials to help library boards when they are faced with hiring a new director and a short webinar series that will serve as a general introduction for new library directors. Most of these resources will show up as links from the MSL Learning Portal later this Spring.

- Identify state and regional experts in the areas of succession issues, employment law, library budgets and local library-government relations who could be invited to present online and in person trainings at Federation meetings, Fall Workshop and MLA Conference. Ensure that these particular areas are included in presentation proposals made by MSL for these events. This will be done to strengthen library directors' understanding of and comfort with these areas. *(Suzanne Reymer, Lauren McMullen, Pam Henley, Jo Flick)*

**(Update: April 2015)** MSL contracted with Sage Solutions to provide succession planning training for trustees and library directors using FY14 LSTA funds designated for trustee training. Sage Solutions' Terry Profota and her associate are presenting three hour sessions at the Broad Valleys, South Central and Golden Plains Spring Federation meetings. The first session at the Broad Valleys meeting was attended by 12 trustees and 2 library directors. The "Emergency Succession Plan Handbook" and a "succession toolkit" created by Sage Solutions and distributed during these sessions has been very well received and has resulted in increased understanding of the importance of strategic, operational and policy planning by library boards, in order to be prepared for succession situations.

**(Update: April 2015)** McMullen presented webinar training on strategic planning to public, academic and special librarians. Strategic planning is especially helpful during

periods of transition and succession, and when organizations are squeezed for resources. The session promoted the benefits of planning and introduced uncomplicated methods and tools. Several attendees expressed the intention to begin strategic planning this year.

- Add a district transition template to the current Public Library District First Year resource so that libraries, boards and local governing and funding bodies can collaboratively work their way through the district transition process. (Suzanne Reymer, Lauren McMullen, Pam Henley)

**(Originally reported February 2015)** A Public Library District Transition Planning Template was completed and made available to public libraries that are considering or are in the process of making the transition to a public library district. This interactive planning tool incorporates information from the *Montana Public Library District Handbook* and *Library District: a guide for the first year*. The template helps users develop timelines, communicate, and coordinate tasks in order to ensure a smooth transition. The release of this resource has generated new interest from librarians on the topic of public library districts.

**(Update: April 2015)** Reymer and Henley participated in a district planning meeting at the Livingston-Park County Library. The city has seen a reduction in funds, which has in turn reduced the library's funding. The library is pursuing the possibility of forming a district to ensure a reliable funding source as well as the development of county-wide library services.

- Receive facilitation training to more effectively engage in local discussions between various parties about potential library districts, and other potentially controversial topics, so that these initial discussions are more effective and successful. (Suzanne Reymer, Lauren McMullen, Pam Henley)
- Spend time focusing on very small (1-2 person) library needs when planning trainings in all areas of library development in order to ensure that MSL trainings are relevant and accessible to all sizes of library staff. When planning trainings, consider libraries where the director is part time and wears many hats, does not have an MLS degree and where the library budget does not include the room for staff to travel regularly to conferences. (All staff)

**(Update: April 2015)** United States Department of Agriculture local representatives presented a webinar on funding rural library buildings and programs.

**(Originally reported April 2014):** Based on recommendations from Montana maker space coordinators, young adult librarians, and school librarians, and from library development staff at the Idaho Commission for Libraries, ordered tools and materials for three kits that will circulate to Montana libraries beginning Spring 2014. Based on this order list, started organizing online training for library staff at the three initial hosting libraries. This training will provide an orientation to maker philosophy and expected pilot outcomes, as well as an overview on how to use the tools provided and develop public programming around them. Maker spaces are collaborative learning and creative spaces that provide tools and materials for STEAM (Science, Technology, Engineering, Arts, and Mathematics) based programming and experimentation.

**(Update: April 2015):** Montana Makers kits moved to six new libraries in February: Cayuse Prairie School in Kalispell, Lewis & Clark Middle School and Lockwood Intermediate School in Billings, Hobson Community Library, Lewis & Clark Library, and Missoula Public Library. Orban led two orientation training webinars for these libraries on January 27 & 29 to help familiarize library staff with the makerspace tools and materials in advance of receiving the kit, which was a suggestion that emerged from evaluations in Fall 2014. Orban led one, hour-long online session on January 28, introducing the Montana Makers pilot to an audience of 24 public, school, and state library staff from Montana as well as from Georgia, Iowa, Colorado, Vermont, and Virginia. Objectives for this webinar were to provide public or school libraries with a concise list of questions to help plan and prepare for developing a makerspace, particularly for libraries with limited space and budgets, and to introduce a selection of materials from the kits with details about pricing, potential audience, and relevant STEAM disciplines.

**(Originally reported April 2014)** Working with a team of three other MSL staff, continued work on the “Share Your Story” lifelong learning and outreach project that will circulate interview and programming kits to Montana libraries beginning Spring 2014, modeled after StoryCorps project and based around the themes of Wilderness, Work, and Women in Montana. Staff has cultivated partnership possibilities with the Montana State University film department and Montana PBS for training library staff and volunteers in video recording and editing as well as conducting quality interviews. Marketing materials are being developed to lend a consistent brand to this new LSTA funded statewide pilot. The main focus of the pilot is the library’s outreach to its local communities and building on partnerships to expand public programming and lifelong learning opportunities in libraries across the state. Relevant content gleaned from this pilot may also be considered for inclusion in the Montana Memory Project.

**(Update: April 2015)** Orban provided an overview of the Montana Makers and the Share Your Story pilots in two, hour-long presentations at the Montana Library Association Offline conference in Billings, February 6 and 7. The theme of the presentation was content creation and collection in the library. Approximately 30 library staff were in attendance at each session. Attendees from five public and school libraries followed up after Offline to request a maker kit later in the spring and summer, and one library expressed interest in hosting a Share Your Story kit.

As part of the continuing GoToMeeting pilot, Flick and Henley presented 2 webinars (January and February) highlighting the goals of the project and offering suggestions on possible uses for public libraries. More support was offered with bi-weekly drop-in sessions so individual librarians could receive additional assistance. A session at the Broad Valleys Federation meeting was well attended, where library directors received headsets provided by the State Library and practiced setting up online meetings. A goal of this pilot is improved communication and information sharing between many of the remote libraries around the state.

Henley offered two webinars on using the DiscoverIT search tool, designed to increase awareness among librarians. Highlights included demonstration of improved search results and options for customizing a library profile. Several libraries expressed interest in creating a DiscoverIT search box for their library home page. Detailed procedures for customization will be offered in upcoming webinars. This will give library patrons improved access to a wide variety of resources through a single search.

Henley and Reymer presented a session on library policies at the Broad Valleys Federation Spring meeting. In addition to information on the need and types of policies to consider, participants were given the opportunity to develop a policy specific to their library. This exercise helps libraries prepare for a variety of circumstances, in turn allowing them to focus on offering quality services to their patrons.

A 6-part series of database webinars called "Winter Wonderland of Online Resources" wrapped up in early February. These webinars covered a specific set of statewide databases each session, increasing librarians' understanding of these resources. The webinars were archived on the State Library's Vimeo Channel for anytime, anywhere learning.

A session entitled "Transitioning from Sage on the State to Engaging Learners" was presented by the Christine Kreger of the Colorado State Library, facilitated by MSL. This

session stresses the need to actively engage learners during trainings, as compared to lecture-style learning.

Goodwin prepared two, new training videos: “MSC Offline Procedures” and “Discard vs. Delete Catalog Records”. The videos have been well received by the MSC membership. Goodwin launched a training needs survey to determine areas of need among MSC members, which will inform training plans for virtual, in person and brief, recorded webinars.

Adams, Marchwick, Hazen and Goodwin traveled to Bozeman and Kalispell to participate in instructor-led training for Bozeman Public and ImagineIF library staff on the Symphony Acquisitions/EDI automated ordering and invoicing module. These staff provided consultation during the training that led to several fixes and changes in how the libraries were using the module.

Birnel held numerous one-on-one training sessions using GoToMeeting with the new MMP contributors. These trainings were focused on creating robust metadata for the Public Library Partnership Projects and CONTENTdm Project Client software trainings for other contributors.

#### **Goal Four—Consultation and Leadership**

4. MSL provides consultation and leadership to enable users to set and reach their goals.

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:

- Create a 5 year strategic plan for the MSC so that the consortium has a guiding document addressing growth, governance and system possibilities. *(Ken Adams)*  
**(Update: April 2015)** Adams and McHugh served in an advisory capacity on the MSC Strategic Planning Committee. The Committee has finalized a draft plan which was shared with the MSL Network Advisory Council on March 10 and has been submitted to the MSC Executive Board in preparation for the MSC Spring 2015 membership meeting. Following action on the plan by the membership, the MSL Commission will receive the plan.

- Develop and undertake an annual visitation schedule of MSC libraries by the MSC Director in order to provide effective in person communication on an annual basis.  
*(Ken Adams)*

- Create an LSTA policy and procedures guide and provide training to assist MSL staff with the annual LSTA process so that staff have clear direction about the process, accessible through a central document. *(Cara Orban)*

**(Update: April 2015)** Orban has created this internal guide with input from Jennie Stapp, Kris Schmitz and McHugh and it will be ready for use by Library Development staff as the FY15 LSTA projects commence.

**(Update: April 2015)** Orban participated in three webinars during this period facilitated by the Institute of Museum and Library Services. The intention of the webinars was to prepare state library agencies for the new reporting framework for the Grants to States Program which will be in effect for the federal FY14 report, due December 31, 2015. Changes to the annual report correspond with the Measuring Success Initiative, which IMLS started in March 2011 to help IMLS and state library administrative agencies plan for, manage, and evaluate LSTA-supported library efforts. As a result of this training and new reporting framework:

- IMLS and state library agencies will be prepared to comply with new federal guidelines mandating that different types of data be collected and publicly accessible.
  - A new system relying less on text narrative allows IMLS to gather and compare information in new ways and to better communicate this data to stakeholders. Likewise, reported data will be “bi-directional” and available for state library agency staff to efficiently search and discover data from efforts nationwide.
  - The new system will have a public interface for the first time. This will allow for data transparency within and across states
- Launch a formal survey to evaluate the changes to consulting services at MSL in order to assist us in determining whether we are meeting the needs of all sizes and locations of public libraries. *(Suzanne Reymer, Lauren McMullen, Pam Henley)*

- Explore opportunities for additional partnerships that enable libraries to temporarily provide traveling exhibits of interest to their local communities, expanding the idea of libraries as community anchor institutions. *(Lead staff: Jo Flick)*
- Attend the Association of Rural and Small Libraries and the Public Library Association 2015 conferences so that LD staff are in tune with the challenges and opportunities for collaboration beyond Montana. *(Staff to be determined)*
- Provide an “MSL Room” during the 2015 Montana Library Association conference in order for librarians to ask MSL staff questions about matters of interest and network with each other. *(Staff to be determined)*

McMullen consulted with Conrad Public Library Board of Trustees on staffing and compensation plans, so the library can offer salaries that are competitive and attractive to new employees and to retain good employees. McMullen also facilitated library futures and planning conversation with Conrad Public Library staff, board members, Friends and foundation members. The Conrad PL passed a dedicated library levy in 2013; since the funding began, it's the first time the library hasn't had to worry about making ends meet and can consider expanding and/or initiating new services. The group identified activities that can be undertaken immediately and considered goals for the future.

McMullen met with the new director at Choteau Teton Public Library. The Choteau library is one of three standalone libraries (along with Fairfield and Dutton) that operate with funding from Teton County. The directors at all three libraries understand the value of collaboration (Fairfield PL is currently applying to join the Montana Shared Catalog) and hope to share resources more closely in the future.

Henley consulted with Sidney-Richland County Library concerning the search for a new director. The local oil-boom economy is creating obstacles for encouraging applicants from outside the area (lack of housing and the ability of the library to offer a competitive salary). Options include candidates with leadership experience but little library background.

Henley conducted new director orientations (Garfield County and Fallon County) and library trustee training (Hearst Free Library) were conducted. These visits help ensure new directors and trustees are aware of resources available to them and are able to continually offer quality library services.

The Mountain West Digital Library has decided to charge their service hubs membership dues. The Utah Academic Library Consortia has reviewed and approved this decision.

The MMP will owe membership dues annually to continue to be a MWDL service hub. Membership dues will now be required of all MWDL Service hubs and will be \$5000 for the first year and \$7500 each subsequent year. To make a decision about how to proceed MSL met with the Montana Historical Society Research Center, University of Montana Mansfield Library and the Montana State University Library to discuss options. All of the participants agreed to split the first year's fee equally, to continue to ensure that MMP content is ingested into the Digital Public Library of America through MWDL and to give all participants a year to discuss other options. One alternative to investigate is that Montana could create a direct service hub relationship with DPLA. The costs of this option are yet to be determined, and is one of the issues the group will explore in the coming year in addition to staff expertise and time required to be a direct service hub.

Working with the MontanaLibrary2Go Executive Committee Chair, Orban organized an online vote on March 5 for the MontanaLibrary2Go membership to pass a resolution to pay for half the cost of the OverDrive annual hosting fee (\$18,000) for FY16. 22 libraries voted unanimously to accept the resolution. The purpose of this vote was to inform the Network Advisory Council, in advance of their discussion of the proposed FY15 LSTA Statewide Projects budget, on the consortium's capability to absorb the annual cost which is to increase after having remained flat for the first seven years of the contract. During this time, the consortium grew from 15 libraries to 89 libraries.

## **Goal Five—Collaboration**

5. 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:

- Add to the sophistication of the Library Directory for optimum utilization by all library staff in Montana. New features planned for FY15 are adding the ability to track CE credits through a library's Directory profile and offering the option of creating and saving within the Directory individually customized, interactive transition planning templates for new public library districts. *(Lead staff: Mike Price)*
- Complete the MSC reorganization effort. The remaining work for FY15 will be changing the circulation policies of the individual libraries not participating in an MSC user sharing group, customizing the item category drop down lists in the system so that each library's list only contains those categories used by the library, reviewing scheduled system reports following the circulation policy changes and removing scheduled reports from the system that are no longer necessary. SirsiDynix, the company that provides the MSC integrated library system, will remove all policies that will no longer be used by the end of calendar 2014. These final steps in the MSC reorganization will make the MSC a successful tool for quality library development and cost effective for its members. *(Ken Adams, Mike Price, Melody Condon, Amy Marchwick)*
- Put together a formal list of current and past directors, and board chairs of public library districts willing to serve as mentors to directors and boards exploring the library district option. Using this list, connect identified mentors and interested directors and board members. Mentoring partnerships have been successful in other areas of library development such as cataloging and we want to see if this approach will aid in the growth of library districts. *(Suzanne Reymer, Lauren McMullen, Pam Henley)*
- Encourage public libraries to conduct community assessments, articulate specific goals and objectives for outreach programming, and build partnerships with one or more partners in the community, in order to illuminate the role of the public library as a community anchor. To accomplish this objective within a single project in FY15, we will focus on the Maker Space project. We will draft a series of questions that will comprise a community assessment tool for use by those libraries that borrow a Maker Space kit. One aspect will be ways in which members of the community were engaged in presenting maker space programs. Building on this information, hosting libraries will then complete an Outreach Action Plan that outlines plans for structured activities which will make use of the maker kits, and articulates the specific resources (staff time, materials, funding, meeting space, and

training) that they and their community partners will contribute toward the implementation of these plans. The Outreach Action Plan will also identify program expectations and desired outcomes (for both libraries and community partners) to be met through these activities. Library staff will be trained in how to use this assessment tool and libraries borrowing the kits will be required to conduct a community assessment using the tool. At the end of the 8 week hosting period, hosting libraries and their community partners will complete an evaluation form for MSL in which they will determine the extent to which they achieved desired outcomes. Evaluation data may be qualitative and based on participant feedback, but will also include program statistics and output data collected by the hosting library. This first effort will inform SLR-LD staff about how we can assist libraries in the future with this kind of assessment. *(Lead staff: Lauren McMullen, Cara Orban)*

- Communicate with Montana school administrators about the MSC and school library growth by regular email updates sent through OPI when new school libraries are added to the MSC, attendance at the Montana School Administrators annual conference, a booth at the Montana Education Association's annual conference and by providing talking points to MSC school librarians to share with their local administration. *(Ken Adams)*
- Study and evaluate the pros and cons of moving to vendor supplied bibliographic records within the context of MontanaLibrary2Go and the MSC, as opposed to records from WorldCat , so that end users have access to quality metadata that ensures successful search experiences. *(Cara Orban, Ken Adams)*

**(Update: April 2015)** The MSC Content Management Committee held their annual meeting to discuss and plan major changes in cataloging procedures related to vendor records, RDA requirements and improving the end-user experience. Several sub-committees were formed to accomplish assigned tasks that will lead to updated cataloging procedures and best practices.

Reymer worked with the Offline Committee comprised of staff from Billings Public Library, MSU Billings Library and Bozeman Public Library to plan and coordinate the Offline conference in Billings.

## **Goal Six—Sustainable Success**

6. 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:

- Demonstrate leadership in the area of social media by more regularly and consistently communicating our news through Twitter and Facebook. More engagement by SLR-LD staff in using social media will exemplify how libraries can leverage tools like Twitter and Facebook to be more present in their own communities. *(All staff)*
- Come together for a meal when attending Fall Workshop, MLA or other statewide conferences in order to make the most of these opportunities for staff collaboration and troubleshooting. *(All staff)*
- Participate in an SLR Division retreat to strengthen communication and understanding of shared goals within SLR. *(All staff)*
- CELEBRATE SLR accomplishments to recognize the good work being done on a daily basis. *(All staff)*

Della Yeager has been hired to provide MMP technical support through a temporary, contracted position funded by FY14 LSTA. Della will help train new MMP contributors, help maintain the webpages, and will post to MMP social media sites. She will also develop training videos demonstrating how to make the most of the MMP and will develop educational materials.