

**Federation Annual Report  
FY 2016  
July 2015 Through June 2016**

**SIGNATURES**

Federation Broad Valleys  
Coordinator's Library Lewis and Clark Library  
Coordinator John Finn

Signature \_\_\_\_\_ Date \_\_\_\_\_

Chairperson - Board of Trustees Jesse Franzen

Signature \_\_\_\_\_ Date \_\_\_\_\_

The Coal Severance Tax (CST) Revenue Accountability Report System requires the Federation Annual Report. The report relates to the Plan of Service, which was adopted at the beginning of the fiscal year as a planning document.

**AWARD/EXPENSE SUMMARY**

Total CST Award: \$36,847.94  
Total CST Expended: \$36,867.94

**EXPENDITURES BY PROGRAM**

Program 1 - Continuing Education/Annual Meeting	\$5,685.11
Program 2 - Continuing Education Grants	\$8,288.13
Program 3 - Technology and Resource Sharing	\$22,094.70
Program 4 - Administrative Services	\$800.00
<b>Total:</b>	<b>\$36,867.94</b>

## EXPENDITURES BY LIBRARY

Library	Status	Total Award	Award Expenses	Local Expenses
Belgrade Community Library	Active	\$1,480.00	\$1,480.00	\$0.00
Boulder Community Library	Active	\$1,480.00	\$1,480.00	\$1,125.15
Bozeman Public Library	Active	\$1,480.00	\$1,480.00	\$7,834.37
Broadwater School and Community Library	Active	\$1,480.00	\$1,470.00	\$1,205.32
Butte-Silver Bow Public Library	Active	\$1,480.00	\$1,480.00	\$1,817.00
Dillon Public Library	Active	\$1,480.00	\$1,480.00	\$420.91
Drummond School & Community Library	Active	\$1,480.00	\$1,480.00	\$180.04
Hearst Free Library	Active	\$1,480.00	\$1,480.00	\$0.00
Lewis and Clark Library	Active	\$7,247.94	\$7,247.94	\$8,993.34
Livingston-Park County Public Library	Active	\$1,480.00	\$1,480.00	\$618.00
Madison Valley Public Library	Active	\$1,480.00	\$1,480.00	\$57.00
Manhattan Community School Library	Active	\$1,480.00	\$1,480.00	\$0.00
Meagher County/City Library	Active	\$1,480.00	\$1,480.00	\$2,103.69
North Jefferson County Library District Clancy Library	Active	\$1,480.00	\$1,480.00	\$0.00
Philipsburg Public Library	Active	\$1,480.00	\$1,480.00	\$149.89
Sheridan Public Library	Active	\$1,480.00	\$1,480.00	\$25.24
Thompson-Hickman Madison County Library	Active	\$1,480.00	\$1,480.00	\$210.14
Three Forks Community Library	Active	\$1,480.00	\$1,480.00	\$731.29
Twin Bridges Public Library	Active	\$1,480.00	\$1,480.00	\$439.03
West Yellowstone Public Library	Active	\$1,480.00	\$1,510.00	\$2,450.00
William K. Kohrs Memorial Library	Active	\$1,480.00	\$1,480.00	\$74.00
	<b>Totals:</b>	<b>\$36,847.94</b>	<b>\$36,867.94</b>	<b>\$28,434.41</b>

## **PUBLIC VALUE SUMMARY BY PROGRAM**

### **Program 1 - Continuing Education/Annual Meeting**

#### **Narrative**

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

Annual Meeting – Members voted to continue meeting once a year for a two-day meeting, location of which is within the boundaries of the Federation. Retreat will include a minimum of two continuing education workshops. Goal: to increase librarian and library trustee attendance by 5%.

The Lewis & Clark Library will coordinate and pay for the costs of lodging, meals and continuing education presentations. As costs have risen and there is higher attendance at the retreat, the Federation approved an increase to cover retreat costs. The Lewis & Clark Library will receive up to \$4,967.94 to pay for this service.

Unexpended funds from any program may be redirected. Remaining funds may be used to secure additional continuing education /professional development opportunities, online databases, MontanaLibrary2Go, book discussion kits, or technology that benefits the Federation.

#### **Public Value**

Lewis and Clark Library - Member libraries took part in training provided by consultants from the State Library. The training will assist in providing enhanced services for patrons.

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Lewis and Clark Library - Increased numbers of titles will help Federation libraries enjoy greater use of the MontanaLibrary2Go service by the libraries' patrons.

Broadwater School and Community Library - In valuable! Learned about programming ideas such as date a book night, robotics club, movie night, and many More. The education element is there as well. We learned how to find and utilize our statistics as well as comparing our statistics with other libraries. Also, have an important business meeting.

Three Forks Community Library - I learned so much!! Also, being a new director and being able to meet directors from all over the state helped so much!!!

Belgrade Community Library - Any staff that attends either of these sessions writes a brief summary of what was learned and shares that information at a library staff meeting, so all can benefit from the information.

### **Program 2 - Continuing Education Grants**

## **Narrative**

This program supports Goals #1 and #2 of the Broad Valleys Federation. Each library will receive a direct grant of \$470.00 to be used to provide continuing education to librarians and trustees, at the discretion of each individual library.

Unexpended funds from any program may be redirected. Remaining funds may be used to secure additional continuing education /professional development opportunities, online databases, MontanaLibrary2Go, book discussion kits, or technology that benefits the Federation.

## **Public Value**

West Yellowstone Public Library - Greater flexibility for permanent staff

Boulder Community Library - We are taught how to repair our worn out books and which vendors will give us the best deals on the supplies, how to manage ourselves and employees, how to help parents and caregivers select appropriate reading materials for different age levels, how we can design our own signs and fliers using free software, making the most of our summer reading programs, become better collection managers and several other classes. I will help present a class this year on "Branching Out, Expanding Library Services To Your Communities. It is our goal to try to keep up with today's technologies to better serve all our patrons.

Boulder Community Library - Lodging for MLA Conference We were able to attend the entire conference with money from the Federation. If we did not receive these funds, we would have only been able to participate in a few classes. Our patrons benefit greatly from the knowledge we gain by attending continuing education. Technology is constantly changing and our patrons expect us to be knowledgeable enough to help them. The librarians are able to network with one another and help each other problem solve different issues at our libraries. Many of us are so far apart, we probably would not have the opportunity to problem solve and come up with creative programming ideas if it were not for these funds. Our library has a very limited continuing education budget, so this increases our opportunities to become better educated.

Lewis and Clark Library - Specifically want to attend a pre-conference on library design and physical layouts of library spaces. Benefit is that they are bringing this information back our Reorganization Team for evaluation.

Three Forks Community Library - I learned how to use social media as a way to engage my patrons. The workshops were invaluable.

Meagher County/City Library - This conference assists librarians in updating their knowledge of technology. It also brings forth new ideas and inventive ways of helping patrons and providing new programs.

Sheridan Public Library - Provides information on CE opportunities relevant to Tiny/Solo Libraries.

Philipsburg Public Library - Both of these meeting provided a better understanding of the library system, training and networking with other librarians throughout the state. Some of the ideas that were shared for teen activities and events at the library have been used in the last year and have had great success.

Meagher County/City Library - Since our library is coming to the end of the fundraising phase, and looking into designing our building, this workshop was very informative. Having all the information possible will better allow our library to construct the most useful building spaces as well as provide opportunity for a smooth transition into our new library.

Meagher County/City Library - These workshops provide up-to-date information on legal information and system changes. They also provide time and space for invaluable networking opportunities.

Meagher County/City Library - The networking and collaboration that comes from this conference provides many services and assistance for librarians and their patrons, especially for libraries in rural areas.

Manhattan Community School Library - The theme: Find Your Inner Superhero: Protect! Empower! Inspire!, reflects the multitude of seminars that gave more tools for Trudy in her library tool belt to serve the patrons in the Manhattan Community. Keynote speaker Eric Atherton, gave direction on how to inspire

library teams and tap into individual potential. This benefits to the library staff as they are encouraged to use their gifts to serve the community and staff.

Another benefit of attending the annual MLA conference is connecting with librarians from around the state. These connections are invaluable to get the creative juices flowing and to problem solve in areas that may be challenging.

The Manhattan Community Library Director and staff are grateful for the Continuing education grant to keep our library on the cutting edge of technology in the library world and to stay connected with other libraries and librarians in the state.

Hearst Free Library - Samuel Walters and Colleen Ferguson attended training sessions relating to the operation of the library.

Bozeman Public Library - Staff came back to the Bozeman Public Library with new program ideas and renewed contacts with their colleagues in other Montana libraries.

Philipsburg Public Library - The Philipsburg Public Library is in the beginning phases of trying to relocate and expand our library. Linda headed up with project with an architecture firm to create preliminary drawings. This conference benefitted our library by expanding the boards knowledge of future trends in libraries.

Livingston-Park County Public Library - Mitch brought back new information regarding many aspects of library operations. LPCPL intends to expand services into Park County, so the session on branches was especially helpful.

Sheridan Public Library - Hopefully, more useful than classes aimed at large libraries.

William K. Kohrs Memorial Library - Continuing education and Federation business meeting

North Jefferson County Library District Clancy Library - Continuing Education for 1 Trustee and Director in Butte.

Our trustee attended the Un-Conference which addressed many areas. The best benefit of this was that she was able to connect with other trustees and hear about library news from across the state. She has kept in contact with some of the other trustees she met.

Our director attended the Public Library Statistics. Very informative about the broad view of the process and the national system. Each year we submit our stats and use them on a statewide basis. However, because of the IMLS we can compare ourselves to other states and select/compare ourselves with peer libraries. It was really good to understand how the system and stats work so that we can use them wisely and avoid the pitfalls. We expect to have to go out for another mill levy in the next 5 years and so will be glad to collect and use this data in that effort. Very good class!

We also had succession training in which we put together a notebook and actually discussed and planned. It was very enlightening to hear from other libraries about issues that we'd not considered, but could definitely become a major problem if not well prepared and planned in passing on the director position. Very good class!!

Drummond School & Community Library - This allowed the director to travel to the Broad Valleys Federation meeting in Butte for Continuing Education, MSC Spring Meeting and MLA in Missoula for networking as well as learning and collaborating with other librarians.

Drummond School & Community Library - Our assistant librarian is also our clerk and having the opportunity to attend our Federation meeting and the state convention has allowed Dorene to meet other librarians and to learn about the ins and outs of collection management, programming, and operations of the library.

Drummond School & Community Library - We are lucky to have a trustee who is interested and willing to obtain continuing education credits. Shelley has met certification requirements and continues to maintain

credits. She also enjoys the opportunity to meet with other trustees at our Federation meeting and MLA. Shelley volunteers to catalog items in our library, helps plan programming, and works the circulation desk one evening each week.

Drummond School & Community Library - The MLA conference is the highlight of the year for us (and for most of the librarians I know!) This is an opportunity to attend sessions on all aspects of running a library. Each of us see the value in attending various sessions and sharing the ideas when we return to our library. It is also a chance for us to network with librarians, clerks, and trustees to understand best practices, and gain ideas in collection management, programming, administration, and technology.

Three Forks Community Library - Without mileage assistance I would not have been able to attend.

Three Forks Community Library - Attending the Federation meeting is probably one of the most important meetings every librarian can attend. We receive valuable continuing education and have the opportunity to network with other librarians from our area and learn and share programs, etc. that work and don't work. I come home refreshed every year after I attend the Spring Federation meeting.

Dillon Public Library - Edna Scalzone was hired as the Assistant Library Director in June of 2015. In that position, she extensively uses the shared catalog for adding and weeding materials. Edna replaced a retiree who had been familiar not only with the Shared Catalog but was also familiar with the Shared Catalog staff. It is important that Edna be aware of the support provided to our Library by the staff of the Montana Shared Catalog and be familiar with the staff so that she know who to go to with her questions. It is also important for Edna to make contact amongst her peers so that she can fully and actively participate particularly in the Shared Catalog but also so that she is aware of the broader community of libraries in our area and across the state. Without these funds, the Library would not have been able to afford to send Edna Scalzone to the MLA Conference.

Madison Valley Public Library - Attendees benefited by finding contacts and networks for more training.

William K. Kohrs Memorial Library - Continuing education for library director for fresh ideas.

### **Program 3 - Technology and Resource Sharing**

#### **Narrative**

This program supports Goals # 2 and #3 of the Broad Valleys Federation. Each library will receive a direct grant of \$1,010. 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.

Each member library may designate some or all of their technology funds for Federation wide purchase of Heritage Quest.

Unexpended funds from any program may be redirected. Remaining funds may be used to secure additional continuing education /professional development opportunities, online databases, MontanaLibrary2Go, book discussion kits, or technology that benefits the Federation.

#### **Public Value**

West Yellowstone Public Library - Helps local who need to learn Chinese for their business and also helps Spanish speakers improve their English for employment opportunities.

Boulder Community Library - It is cheaper to use the courier to move books from library to library. This allows our patrons access to more books from other libraries.

Boulder Community Library - We are now going to community events and signing people up for library cards right on the spot. Previously, we would have people fill out forms and then they would have to come to the library to receive their cards. Now, in just a few minutes we can scan their drivers license or ID card

and it automatically loads onto the computer. We also are able to take the scanner to smaller communities (Basin, Cardwell) and sign them up for cards as well. These are communities that do not have libraries but are now using our library services.

Boulder Community Library - Going to schools and community events to sign people up for library cards was cumbersome and took a lot of preparation. Now that we have the iPad and the bluetooth scanners, we don't have to worry about toting a heavy laptop and accessories. People come up to talk to us and by the time they leave, they have their cards in hand!

Livingston-Park County Public Library - LPCPL circulated 6,036 via InterLibrary Loan during the fiscal year 2015-16. Without our OCLC contract, that number would have been zero.

Sheridan Public Library - Each router connects to a separate internet connection, which supports separating the wi-fi users from the internal network, balancing loads and speeding up connections.

Sheridan Public Library - Replacements for existing protection after power surge--to prevent loss of equipment during the next one, as happened last year (lost 2 new computers not behind surge protection to CPU damage)

Sheridan Public Library - Small-scale test of Linux for Public use, based upon the major privacy concerns about using Windows 10 for public computing, and Windows 10 update problems on unreliable networks. We are hoping for a couple of secure workstations that patrons can use for private business (banking, etc.), as well as ones that can update the OS reliably, which, it is predicted, Windows machines will not be able to handle as of the latter part of 2016.

Meagher County/City Library - This system simplifies how our patrons utilize our library services. Providing more simplified services allows for a broader range of service coverage, as well as happier patrons.

Thompson-Hickman Madison County Library - Along with OCLC, the MSC is THE essential resource for connecting our customers with materials and products that improve their lives. Without the MSC, our library would be much less robust in its services to our community.

Thompson-Hickman Madison County Library - Since there was no other library in our service area that was offering a genealogical research database, we decided to do a one-year trial of HeritageQuest to see how our customers liked it. After almost one year of having this subscription, there has been an increase in library card applications specifically for the purpose of customers accessing the database from their homes.

Since HeritageQuest is a more limited version of Ancestry, we have decided to change to the latter database for this coming fiscal year, just to see what the response might be. Since Ancestry is only able to be accessed at the library instead of remotely, we are hoping this new subscription might bring more people to the library.

Hearst Free Library - Patrons benefit by having access to materials throughout OCLC's online ILL system

Bozeman Public Library - The four new laptops and renewed Office subscription allowed more people to take our free public computer classes and to complete word processing projects on their own.

Philipsburg Public Library - We regularly have show movies, open to the public. During the summer reading program we showed Zootopia and had 30 patrons attend. We only had six kids in the summer reading program. This expands our patronage and get people excited about our programs at the library.

Philipsburg Public Library - This enables us to electronically catalog and track our circulation.

William K. Kohrs Memorial Library - Heritage Quest gives our patrons access to genealogy resources.

North Jefferson County Library District Clancy Library - MyMontanaLibrary2Go is one of our most successful library programs. It is very well loved and well used by patrons, but its benefits go far beyond popularity and money well spent. MML2Go reaches out past our members to non-users in our community. We have many members--who only signed up for a card because of the downloadable audios and books and who only ever use the downloadable audios and books. It is a way to serve tax payers who are not traditional

library users. It has also been a great outreach tool to convert some of our nonusers to traditional library patrons. Once they realize what we can do for them--they start showing up and getting their tax monies worth ;)

However, MML2Go also allows us to connect with our patrons in really wonderful ways. We teach technology one on one. We get to talk with and enjoy teens that operate in a wholly digital way. They have great ideas and suggestions and seem to see ahead of the curve and know about services/technology to teach us ;) I really love these interactions with patrons. Sometimes they start off as kind of rotten--like when their smartphone has updated its operating system which causes their overdrive account to misbehave--but these almost always turn around to be really positive and wonderful interactions about the value of the service and we are able to solve the problem (or get overdrive or MSC to solve the problem) quickly.

My favorite story lately is about an older couple who were text only and not techie at all. As their eyesight failed and the books get bigger and heavier (arghh!) they read less. Two of their grandchildren upgraded their devices so gave their old devices to the older couple. So our two patrons brought in the Kindle Fire and the Ipad. We got them set up. It was several weeks where they brought them into us many times to load new books or to return books or what-have-you. However, they slowly got the hang of it and have taken flight on their own. Now they really are quite techie ;) They've allowed their son to hook them up with a Roku and have ditched their cable subscription. Lately they got smart phones and were in to have us help them practice so that they'd be able to have all the technology work for them as they went to visit one of their children in another state. He told me that they never would have begun or had confidence to continue if it hadn't have been for the staff at the Montana City Library. It made our day!

Drummond School & Community Library - Both the director and assistant librarian will have access to Mobile Circ, and the tools to manage the collection, circulation, access the database online and attend meetings electronically.

Drummond School & Community Library - Our library director is currently using an iPad2 which has become slow and does not have the capacity for many of the new upgrades from Apple. The new iPad will allow the director and assistant to continue to keep up with the demands of the old device - take pictures at programs (especially Lego Club! The children adore seeing there creations and knowing that it is preserved even after they take their construction apart.) mobile circulation within the library and in the classrooms, interactive books for story hour, and various apps. The wireless mouse for each of the laptops allow the librarian and assistant to use the laptops at conferences and meetings. The external drive will be used for digitizing items from the local historical society; in connection with our contribution to the Montana Memory Project. (Lower Valley - Granite County & Louis Piche Collections.)

Manhattan Community School Library - This is such a huge benefit to our patrons as it gives them the ability to search for library materials from anywhere. They may place holds for items from any location with an enabled device. They may request materials from other libraries that we share with and they may renew items from an enabled device.

This also streamlines the MCSL staffs ability to find and provide a multitude of materials to our patrons including our high school patrons for school projects. The shelves of Bozeman, Belgrade, Three Forks and West Yellowstone libraries are at our fingertips and can be borrowed for our patrons and the Manhattan High School teaching staff.

Belgrade Community Library - The benefits of the MSC are numerous. Our patrons have the ability to reserve and view library materials from the BridgerNet group. It would not be possible to access this large variety of items without a cooperative software system that allows sharing. My hope is that we will continue to share more of our materials, and receive materials from other sharing groups like Partners in the future.

Three Forks Community Library - The Montana Shared Catalog is an invaluable resource for the library. It keeps my patrons content when their home library is not able to purchase all the items for which they are interested.

Broadwater School and Community Library - Follett hosts our library server as well as providing technical services, such as inventory. This system allows people to look for books at home, in the library, or at school.



Broadwater School and Community Library - This benefit allows our county patrons (over 2000 people) the opportunity to download free books onto their electronic devices. Free of charge. This impacts our library and school because the teachers are able to download books rather than buy more copies of a book. This saves the taxpayers money, because it cuts down the number of copies, of a single title, that the district and library have to purchase.

Dillon Public Library - The cost of our participation in the courier this fiscal year was not an expected cost. Without these funds, we would not have been able to participate in the Statewide Courier system. We are in the process of figuring out a cost comparison between the Courier and using USPS to mail individual packages. The outcome of that cost comparison will let us know if it will be economically viable for us to remain part of the courier system by sharing costs with the Lucy Carson Library at UM Western.

Madison Valley Public Library - These fees make it possible for our patrons to access ebooks and audio books.

William K. Kohrs Memorial Library - OCLC Group services enables our library to provide interlibrary loans to our patrons

#### **Program 4 - Administrative Services**

##### **Narrative**

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

##### **Public Value**

Lewis and Clark Library - Program Four benefits all Broad Valleys Federation Libraries by ensuring that the work needed to maintain the high level of quality at the annual retreat continues.