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**Montana State Library Commission**  
**Wednesday, March 29, 2017**  
**9:30 a.m.**  
**DoubleTree Hotel**  
**Billings, Montana**

AGENDA

The State Library Commission is committed to providing access to its proceedings in accordance with MCA Title 2, Ch. 3 Part 2 Open Meetings. All meetings of the Commission will be streamed and recorded via an online meeting platform.

The State Library Commission welcomes public comment. The Chair will ask for public comment on agenda items throughout the meeting from persons attending the meeting in person and those attending the meeting through the online meeting platform.

All comments received, including those received through the online meeting platform, become part of the official public record of the State Library Commission proceedings in accordance with MCA 2-3-212.

*Times noted are approximate. The Commission will move through the agenda as needed. Commissioners will break for lunch at approximately 12:30 p.m. Lunch will be provided by the Montana Library Association for registered attendees.*

9:30 a.m. Call to Order and introductions

Approval of Minutes – **Action**

- [December 14, 2016](#)
- [February 8, 2017](#)

State Librarian's Report – Stapp

- [Work Plan – CS](#)
- [Work Plan – DL](#)
- [Work Plan – SLR/LD](#)
- [Work Plan - TBL](#)
- [Discretionary Pay Audit](#)

[Legislative update](#) – Stapp

[Policy review](#) – Hammer

We make an effort to ensure that our meetings are held at facilities that are fully accessible to persons with mobility disabilities. If you plan to attend our program and will need services or accommodations relating to a disability, please contact Marlys Stark at 406-444-3384 at least five (5) working days prior to the meeting.

- [Code of Conduct](#) - **Action**

[Library Services Technology Act Evaluation](#) – **Action** – Cook

- [LSTA Evaluation 2013-2017 – Report](#)
- [LSTA Evaluation 2013-2017 – Full Report](#)

Network Advisory Council Report – Cook

- [SFY2016 Federation Annual Reports Analysis](#)

[Montana Shared Catalog New Libraries](#) – Cook/Goodwin - **Action**

[Funding Task Force Memo](#)

[Commission Goals and Objectives](#)

[Commission Calendar](#)

[Reporting Inventory](#)

To see all library events, please visit the MSL event calendar at <https://app.mt.gov/cal/html/event?eventCollectionCode=msl>.

Public Comment on any matter not contained in this agenda and that is within the jurisdiction of the State Library Commission.

Other Business & Announcements

Adjournment

Federation Funding Analysis – Cook

Commission Goals and Objectives – Commission

- Funding Task Force update
- Reporting Task Force update
- Calendar Commission review

Other business/announcements

Public Comment on any matter not contained in this agenda and that is within the jurisdiction of the State Library Commission

Adjournment

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**MONTANA STATE LIBRARY (MSL) COMMISSION MEETING  
9:30 A.M., DECEMBER 14, 2016  
HELENA, MONTANA  
OR GOTOMEETING**

**ATTENDEES:**

Commissioners: Chairman Bruce Newell, Kenning Arlitsch, Colet Bartow, Connie Eissinger, Anne Kish, Aaron LaFromboise online, and Ken Wall

Staff: Jennifer Birnel online, Troy Blandford, Christie Briggs, Eve Byron online, Tracy Cook, Jessica Edwards, Erin Fashoway, Evan Hammer, Duane Lund, Cara Orban, Kris Schmitz, Jennie Stapp, Marlys Stark, and GG Waldburger.

Visitors: Pamela Benjamin online, John Finn, Sonia Gavin, Nanette Gilbertson, and Siri Smillie.

**Chairman Newell called the meeting to order at 9:31 a.m.**

The newest Talking Book Library (TBL) staff member, Readers' Advisor Glenda (GG) Waldburger was introduced by Christie Briggs.

Jennifer Birnel was present online in order to receive her five-year longevity pin from Cara Orban. Erin Fashoway received a 10-year pin from Evan Hammer who in turn received his 10-year pin from Jennie Stapp. Carol Churchill was unable to attend but will be receiving a 25-year longevity pin from Kris Schmitz. Duane Lund also received a 25-year longevity pin from Evan Hammer.

**APPROVAL OF MINUTES:**

**Motion was made by Commissioner Eissinger and seconded by Commissioner Wall to approve the minutes of October 12, 2016 as presented and the motion passed.**

**STATE LIBRARIAN'S REPORT:**

Dr. Anthony Chow has been to Montana twice to perform his information gathering work on the Library Services Technology Act (LSTA) five-year plan evaluation. He has met with staff, commission, and Network Advisory Council (NAC) representatives here at the library and has been in the field to meet with librarians. He is also conducting an online survey to gather feedback from librarians and patrons. Dr. Chow anticipates that the draft report will be ready by February 1 so the draft should be in the February materials review.

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The evaluation is the first step of the upcoming Institute of Museum and Library Services (IMLS) LSTA five-year planning process.

Senator Jon Tester will be the co-sponsor for the IMLS reauthorization, which should move through this Congressional session.

The project to install the second TBL sound booth, previously approved by the commission, has been delayed. A review of the schematics by a new architect revealed that the booth was not wheelchair accessible and, therefore not in compliance with the American with Disabilities Act. To increase the size of the modular booth will increase the booth cost by about \$4,500, an amount that is within the original budget approved by the Commission. However, the new timeline will require the State's General Services Division to bid out the necessary construction work rather than doing the work in-house. Staff will have more information about the costs of a bid at the February meeting and may need to make an additional request for funds from the Trust to complete the necessary work. Staff is cognizant that this project significantly reduces the amount of funds available in the trust.

Gerry Daumiller, hired as the first GIS Analyst for the Natural Resource Information System in the late 80s, has retired. He will continue his work on the Montana Association of Geographic Information Professionals (MAGIP) board.

Items of MSL interest in the upcoming legislative session include House Bill 61, the bill to implement next generation 9-1-1. The public safety services bureau and the 9-1-1 advisory council would plan the use of 9-1-1 funding.

A bill draft exists entitled 'generally revise library laws' which the drafter says she is keeping open as a placeholder. There are other pieces of legislation naming the library to watch but affect seems minimal to the library. An example of this would be a bureau of mines bill to start a surface water advisory committee. MSL staff will be monitoring all bill drafts, currently nearing 2,200, for anything that might affect their work and the communities we serve.

January 18 will be the library legislative night and MSL has requested that they hold the budget hearing on that date.

Representative Garner is carrying the legislation to extend the sunset date for the statutory appropriation for public library state aid. MSL will share the number after it is introduced.

MSL has drafted legislative talking points for libraries to use with their legislators and other interested parties. The legislative snapshot will be updated frequently this session. MSL staff will be preparing briefing sheets and folios for each legislator and then weekly briefing sheets from then on.

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## **GOVERNOR'S OFFICE LEGISLATIVE AGENDA:**

Siri Smillie, Governor's Education Policy Advisor, reviewed the Governor's agenda for the upcoming legislative session. She commented on the commission's strategic framework and said it was very beneficial. The Governor's legislative plan is to live within our means and retain the rainy day fund. She identified six main priorities:

- 1.) Fiscal responsibility, including building the rainy day fund;
- 2.) Infrastructure investment, including schools and long-term solutions to funding infrastructure;
- 3.) Job creation and business incentives, including apprenticeship programs;
- 4.) Educational opportunity, including early childhood grants, quality childcare, timber for technology funds dedicated for a limited time to the broadband infrastructure and more;
- 5.) Tax fairness for businesses; and
- 6.) Caring for Montana families, including keeping seniors in their homes, suicide prevention, child and family services and more.

She summed up by stating it will be a challenging biennium.

## **MONTANA LIBRARY ASSOCIATION (MLA) LEGISLATIVE AGENDA:**

John Finn and Nanette Gilbertson represented MLA. They feel that the MLA and MSL relationship is like no other as it is very collaborative and coordinate well with excellent communication and priorities aligned.

LC0824, MSL's state aid funding bill, sponsored by Representative Garner, is the number one priority of MLA. MSL has developed tools to tell stories of what the funding does for communities. John wrote an article for libraries to put in their local papers. MLA presented at the local government interim committee along with several library representatives that gave great presentations.

The second MLA priority is supporting the MSL budget and their third priority is to keep an eye on policy decisions that might affect libraries in regards to privacy, intellectual grounds, censorship, tax levies and so on.

A professional photographer will take the read poster pictures for the legislative night.

## **LAWS (LEGISLATIVE LOOK UP BILLS INFORMATION) PRIMER:**

Sonia Gain, Legislative Reference Librarian, gave a tutorial on how to negotiate the LAWS website to monitor legislative bills and encouraged people to call her with questions.

## **2019 GOVERNOR'S EXECUTIVE BUDGET REDUCTION PLAN:**

Staff is requesting approval of the proposed reduction plan. The proposed Governor's budget is the beginning point for the legislative session and includes a five percent

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across the board reduction in agency operating dollars. Legislative action will likely change the budget in the coming months but staff will use the proposed reduction plan as guidance when discussing the impacts of the proposed cuts. Importantly, this plan does not change our current budget.

**Motion was made by Commission Kish and seconded by Commissioner Bartow, to approve the reduction plan as proposed. Commissioner Arlitsch proposed an amendment to the motion to include a statement of concern with the idea of further reductions and tying more MSL services to Coal Severance Tax monies. Commissioners Kish and Bartow were okay with the amendment and the amended motion passed.**

**Meeting recessed for lunch at 12:01 p.m. Reconvened at 12:20 p.m.**

## **NAC REPORT:**

The bulk of the meeting was about choosing library development task force recommendations to focus on and to set up small groups to look at goals and impacts and so on. There was a small amount of FY'16 funding remaining approved to apply to the training budget.

## **POLICY REVIEW:**

Staff proposed updates to three policies. Staff requested edits or comments now and will request action to approve the updated policies in February. The first two policies pertain to employees and the third policy pertains to patrons.

The draft Telework Policy removes the requirement that employees work at MSL for one year prior to teleworking. This change is necessary because the current restriction is not practical for MSL given our reliance on remote staff. There are currently six positions that telework and are advertised as telework. The commission offered no comments.

The Drug & Alcohol Free Workplace Policy is primarily a format update with alcohol added to clarify that it is included. The commission offered no comments.

The Code of Conduct replaces the Disruptive Patron policy. The goal will be to post this in a public area so reformatting seems beneficial. This is a list of a variety of behaviors expected or prohibited rather than just referencing violent or inappropriate behaviors.

**The commission felt that the tone seemed negative and asked for rewording and attorney review prior to approval. They commented on items such as 'no food' and asked for reasoning.**

## **FY'18/'19 MONTANA LAND PLAN:**

The council would like to focus on a two-year cycle planning cycle that better accommodates the granting cycle, which will result in a more data driven plan. This

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plan is a first attempt at revising the cycle. The granting priorities remain the same. Staff updated the budget and changed the timeline slightly. In the future, the staff plan to shift the timeline of the planning process to better accommodate the budget process for local jurisdictions. Grant awards will be announced sooner in the year even though the grants will still be awarded based on the fiscal year.

**Motion was made by Commissioner Bartow and seconded by Commissioner Arlitsch to approve the land plan as presented and the motion passed.**

## **MONTANA LAND INFORMATION ACT (MLIA) LEGISLATIVE REPORT:**

Statute requires that MSL present an MLIA report to the Legislature. Staff are excited to have exchanged the traditional text based report for one that uses a story map.

**Motion was made by Commissioner Eissinger and seconded by Commissioner Kish to approve the report to go to the legislature. Commissioner Wall will suggest some presentation changes that will not change the report substance. The motion passed.**

## **MONTANA STATE LIBRARY STRATEGIC FRAMEWORK:**

The commission has been working on a strategic framework for most of this year. The goal is to have an impact driven plan with input from various interested parties. This is the final draft for the commission to approve.

**Motion was made by Commissioner Eissinger and seconded by Commissioner Bartow to accept the plan as presented and the motion was passed.**

The commission will form task forces to review reporting and funding with a first look report in February and a progress report in June. The funding strategy group will consist of **Commissioners Newell, Eissinger and Kish** and will look at how much is needed and discuss ideas of where and how to come up with funding. The reporting group will consist of **Commissioners Wall, Arlitsch, LaFromboise and Bartow** and they will look at reporting mechanisms that correlate to the framework and are impact and data driven with the ultimate goal of less staff work and better information. The commission will also continually review the framework.

## **COMMISSION GOALS AND OBJECTIVES:**

The proposed 2017 meeting dates are February 8, March 29, June 14, August 9, October 11 and December 13. The March meeting will be in conjunction with the MLA conference in Billings and there might be an online LSTA planning meeting and/or legislative meeting.

**Motion was made by Commissioner Wall and seconded by Commissioner Eissinger to accept the 2017 meeting dates as presented and the motion passed**



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**with Commissioner Bartow recusing herself, as she does not know if she will be the designee.**

## **PUBLIC COMMENT:**

There was none received.

## **OTHER BUSINESS/ANNOUNCEMENTS:**

The OPI launched a new online information resource called Montana Teach on December 13, 2016. This resource idea came out of the hackathon held earlier this year. The website surfaces the best of Montana's information resources for teachers and students as well as the public. Montana Teach was created through a partnership of many different people and agencies and the url is [montanateach.org](http://montanateach.org).

## **ADJOURNMENT:**

**The meeting adjourned at 2:08 p.m.**

# DRAFT

**MONTANA STATE LIBRARY (MSL) COMMISSION MEETING  
9:30 A.M., FEBRUARY 8, 2017  
HELENA, MONTANA  
OR GOTOMEETING**

**ATTENDEES:**

Commissioners: Chairman Bruce Newell online, Kenning Arlitsch online, Elsie Arntzen, Connie Eissinger online, Anne Kish online, Aaron LaFromboise online, and Ken Wall online.

Staff: Tracy Cook, Evan Hammer, Bryce Maxell, Martin Miller, Cara Orban, Kris Schmitz, Jennie Stapp and Marlys Stark.

Visitors: Lisa Mecklenberg Jackson online.

**Chairman Newell called the meeting to order at 9:30 a.m.**

Superintendent Elsie Arntzen was welcomed as the newest commissioner. She holds a statutory seat that is often filled by an Office of Public Instruction (OPI) designee but at this time she intends to attend all the meetings herself.

Bryce Maxell spoke about Martin Miller who has been with Natural Heritage Program (NHP) for more than 20 years but is retiring soon. Martin also addressed the commission briefly.

**APPROVAL OF MINUTES:**

**Motion was made by Commissioner Arlitsch and seconded by Commissioner Wall to approve the minutes of December 14, 2016 as presented and the motion passed.**

**STATE LIBRARIAN'S REPORT:**

The bulk of the State Librarian's work since the last meeting has been legislative while the other key focus is applying the data driven model to planning. A legislative report is next on the agenda.

Tracy Cook has been working with the federation coordinators to think about the plans of service and how to tie the plans to the MSL strategic framework.

Staff are conducting an analysis for holistic federation spending. This analysis will be on the agenda at the March meeting.

MSL received official notice of the fiscal year 2017 Library Services Technology Act (LSTA) award from the Institute of Museum and Library Services (IMLS). This year's award is about \$216,000 less than it was last year. IMLS is referring to this amount as

our official award but unofficially has called it a partial award. We do know that the award is based on the amount appropriated to IMLS under the federal continuing budget resolution that expires in April. IMLS has stated that supplemental awards may be made based on additional funding and IMLS discretion. Typically, staff would work with the Network Advisory Council (NAC) at this time to develop a library development budget based on the amount of the award and then the proposed budget would be recommended to the Commission in April. This year, with the Legislature still in session, and so many items not decided yet, the NAC will not consider budgetary recommendations until the meeting in May. Staff will bring a budget recommendation to the commission in June.

The Library Development Division budget adopted by the commission last August included spending authority for some of the funds through approval of the HB2 budget. Talking Book Library (TBL), Montana Shared Catalog (MSC) and Montana Memory Project (MMP) will have expended \$150,000 of this award by June.

Delays to the work on the TBL recording booth caused when an Americans with Disabilities Act requirement was not initially met, meant that the State General Services Division had to contract out the remaining construction work. In a later agenda item, staff will request additional funds from the MSL trust to cover the added cost incurred due to the delay. MSL will have a celebration for the new booth during the June commission meeting. The League of Women's Clubs, who contributed money originally to help fund a second recording booth, will receive an invitation.

Jennie received an appointment to the National Geographic's Advisory Council; the first meeting will be held at the end of March.

Cara Orban and Sara Groves have been looking for funding to continue the early literacy texting program for another year. They received a \$10,000 grant from the Washington Foundation for that purpose. After approval, they will go through a limited solicitation process to get a vendor for the program.

## **LEGISLATIVE UPDATE:**

State Librarian Stapp reported that the 5% budget reduction included in the Governor's budget remains in place along with an additional 2% vacancy savings, bringing the total vacancy savings included in the current budget bill to 6%.

A work session of the natural resources subcommittee considered how coal severance tax funds are appropriated from the Shared Account. These funds are split between the Department of Natural Resources and Conservation, the Department of Agriculture and the State Library. The committee is considering a companion bill to HB2 to put into statute the percentage for the three agencies that share funding. The committee stated they would like MSL to receive more of the funds. Right now MSL receives just under 15 percent of the funds in the account. The proposal would make that amount between 17 and 18 percent.

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The Montana Library Association and the Montana Association of Geographic Information Professionals hosted another great library legislative night with about 160 attendees. Legislators posed for their Read posters, and, for the first time, they held a Facebook live event, and posted various videos to the MSL Facebook account.

Colleen Hamer, Kenny Ketner and Eve Byron have been putting a lot of work into producing legislative snapshots in a new format this year. They send out a couple each week so legislators have received twelve so far.

Staff are monitoring several other bills that might affect MSL programs. SB95, which would have swept the funds from various accounts, including the 911 account, into the General Fund, is tabled. HB3, which pertains to supplemental funding, generally helps agencies make it through the current year but now has language in it to reduce expenditures in the current fiscal year. There is a mandated list of reductions to make by March 11, which should total \$10,000,000. This bill could be a major concern for MSL but there is no real information at this time.

HB61 involves NextGen911 and modernizes 911 language would appropriate funding for MSL to do an assessment of relevant 911 data that exists in Montana. This bill passed unanimously out of committee and looks as if it will move forward but the funding may be in jeopardy.

The pay plan bill, HB13, is waiting for a hearing. A companion bill has been introduced that separates out benefits from pay. Indications are that the proposed benefits bill will pass but the pay plan will not. The concern with this scenario is that, not only will employees not get raises, but also the contingency plan contained in HB13 will not be available to cover any shortfalls in vacancy savings.

HB261 is the State Aid bill and it is moving forward. The bill has passed the house and has a hearing scheduled in the senate.

## **FISCAL YEAR 2017 SECOND QUARTER FINANCIAL REPORT:**

Kris Schmitz pointed out a few highlights of the report such as funding added to the trust account and the expenditures coming out of it. The sound booth installation will continue to see expenditures throughout the year. LSTA for FY15 closed in December and all projects moved into LSTA FY16.

**Motion was made by Commissioner Kish and seconded by Commissioner Arlitsch to approve the financial report as presented and the motion passed.**

## **POLICY REVIEW:**

The telework policy presented last commission meeting had no changes and the staff is now asking that it be approved.

**Motion was made by Commissioner Wall and seconded by Commissioner Eissinger to approve the telework policy as presented and the motion passed.**

There are no changes from the previously presented draft of the drug and alcohol free workplace policy and staff is requesting approval.

**Motion was made by Commissioner LaFromboise and seconded by Commissioner Kish to approve the drug and alcohol free workplace policy as presented and the motion passed.**

## **REVIEW OF DRAFT LSTA EVALAUTION:**

Dr. Chow found that MSL met the LSTA requirements and he will provide feedback from constituents. The next step will be for staff to review the evaluation and to seek clarification where necessary from Dr. Chow regarding the evaluation and his recommendations. A shorter version of the evaluation will be presented to the commission in March and then the planning process for the new five-year plan will begin.

In his evaluation, Dr. Chow identified five significant ways the state library could help: 1.) Continue to support economically distressed libraries; 2.) Focus integrated support in workface development, digital literacy and internet access; 3.) Community education and outreach; 4.) Continue doing a great job in taking the lead in statewide resource sharing; and 5.) Address concerns from some libraries about the graying of the field and recruiting and retaining library professionals.

## **MONTANA STATE LIBRARY TRUST REQUEST:**

Christie Briggs explained that this is a request for additional funds to complete the construction of the second recording studio for the recording program. The additional funds are necessary because of the ADA non-compliance issue identified from the original plans.

**Motion was made by Commissioner Eissinger and seconded by Commissioner Wall to approve the funds requested and the motion passed.**

## **MONTANA STATE LIBRARY STRATEGIC FRAMEWORK:**

The framework approved based on outlining actual steps in the work plans.

Commission and program work plan reviews all use the framework. Feedback regarding reporting requested.

The reporting task force had a conference call to form a draft for input from all the commission. Work will continue.

The funding task force held an email discussion and again submitted a draft for input from all of the commission.

**Motion by Commissioner Arlitsch and seconded by Commissioner Kish to accept the draft scopes of work and the motion passed.**

## **COMMISSION GOALS AND OBJECTIVES:**

Commissioner Kish will attend the Broad Valley Federation meeting. Commissioners Wall and LaFromboise will attend Tamarack and Commissioner Arlitsch might as well. Commissioner Arlitsch will attend South Central. Commissioner Eissinger will attend Sagebrush. The Pathfinder Federation meeting date has not been set yet but Commissioner LaFromboise might attend. Golden Plains is also not set but is usually in Wolf Point. Commissioner Arlitsch might attend that one. Commissioner Newell will attend as many as he can. MSL staff will attend all of the federations meetings.

The spring Montana Land Information Advisory Council (MLIAC) meeting date was changed to April 20 so that the meeting may be held in conjunction with the Intermountain GIS Conference. The next Commission meeting is March 29 in conjunction with the MLA conference. This meeting is earlier than normal. The commission meeting is on Wednesday and the Conversations with the Commission workshop is on Thursday from 9:00 a.m. to 10:00 a.m.

Commissioner Wall announced that he would present at the ESRI user conference July 11 in San Diego as a commissioner rather than a business partner. His proposal was to talk about NextGen911 work from grants. He is not requesting funding.

The commission talked about needing a process for deciding when it is okay for a commissioner to speak for the commission in a conference. Funding is also dependent on approval.

**State Librarian Stapp will write up a procedure for attending a conference as a commissioner.**

Commissioner Newell volunteered to attend National Library Legislative Day (NLLD) and Commissioner Arlitsch volunteered as an alternate.

Commissioner LaFromboise requested to add the spring workshop and Leadership Institute to the calendar.

## **PUBLIC COMMENT:**

There was none received.

## **OTHER BUSINESS/ANNOUNCEMENTS:**

Suzanne Reymer, Jo Flick and Jennifer Birnel are all attending Offline.

## **ADJOURNMENT:**

**The meeting adjourned at 12:05 p.m.**

**Montana State Library  
Central Services  
January – June 2018**

Green (no font distinction) – activity progressing as expected.

Yellow (*italicized*) – activity may be delayed but the delays do not necessarily rise to the level of Commission concern

Red (**bolded**) – activity is delayed and Commission attention is warranted

Blue (underlined) – addition or change to the original work plan.

**Strategic Framework – Fostering Partnerships**

**Activities:**

- Build an intranet site for cross-agency documentation

<b>Inputs</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Impacts</b>
IT staff, Erin Fashoway, other staff as necessary	A new Intranet that allows all state employees to access documents related to our ESRI ELA. Future documents used by staff of other state agencies will be added in the future.	MSL staff efficiently share and receive information about the services we administer for other state agencies.	Improved efficiency in other state agencies results in a greater degree of future collaboration
		State employees have improved access to self-service documents.	
		State employees report improved satisfaction in the efficient administration of State Library Services.	

## Strategic Framework – Secure sufficient and sustainable funding

### Activities:

- Offer quarterly training sessions to State Library staff

Inputs	Outputs	Outcomes	Impacts
Time of Kris Schmitz, Marlys Stark, Colleen Hamer, Carol Churchill, Evan Hammer, Tracy Cook, Jennie Stapp, and other staff as necessary	Trainings and training materials for the various sessions: Budget/Funding, Purchasing, Staff Handbook, Travel, FMLA, State Library programs	Managers are confident in their ability to implement policies consistently and fairly.	MSL staff is more knowledgeable which leads to more effective and efficient in their work. Staff feels more comfortable and confident in their work.
Activity progressing as expected.	- Stapp presented an overview of the State Library at the February 22 all staff meeting.	Staff report increased awareness and understanding of State and State Library policies and satisfaction in how they are treated as State Library employees.	
		Staff and management find increased opportunities for cross-program collaboration that can lead to improved program development	



- Clean out, organize storage areas

Inputs	Outputs	Outcomes	Impacts
Time of Kris Schmitz, Marlys Stark, Colleen Hamer and Carol Churchill	Clutter and space is cleaned up and organized into sections.	Freeing up much need available storage area to make the best use of our space available.	MSL staff will have an efficient organized storage area.
Activity progressing as expected.		Managers and the Commission are better able to plan for future space needs.	

- Policy review

Inputs	Outputs	Outcomes	Impacts
Lead Kris Schmitz, various staff  Activity progressing as expected.	  New online staff handbook	  Employees have a current and accurate policy guidance and staff handbook	MSL staff is more knowledgeable about policies which leads to more efficient and effective manner to complete their work

- Develop a standardized human resources recruitment package

Inputs	Outputs	Outcomes	Impacts
Time of Marlys Stark and Kris Schmitz  Activity progressing as expected.	  Standardized, easy to use package of recruitment and hiring materials.	  MSL management staff has the tools they need to make the hiring process smooth and efficient	The State Library attracts, develops, and retains a highly skilled and dedicated workforce

- Implement a social media marketing strategy

Inputs	Outputs	Outcomes	Impacts
Time of Eve Byron and other staff as necessary	Regularly recurring Facebook posts that are boosted when appropriate to garner attention to and use of State Library services and information	Staffs see an increase in engagement measures available through social media as the public learn more about the State Library	Through social media, patrons have access to the information they need to understand and influence change in their communities
Approximately \$500 from the State Library Marketing Budget		Increased social media engagement results correlates to increased demand for services.	Through social media online communities foster partnerships that ensure that Montanans thrive.
Research and training on the effective use of social media tools for marketing		Online communities develop and engage around State Library information resources and services	

## Strategic Framework – Create a useful information infrastructure

### Activities:

- Launch ASPeN (Applications, Services, Programs, and Network)

Inputs	Outputs	Outcomes	Impacts
IT staff, SLR staff, and other staff as necessary	A partial launch of ASPeN is planned for March 2017. ASPeN should be fully operational in early 2018. <ul style="list-style-type: none"> <li>- <i>Role out is delayed to allow for adequate testing. Delays are the result of limited staff time.</i></li> </ul>	State Library staff benefit from the efficiencies of a single, fully-integrated, data driven administration system that allows for easier program planning and delivery.	Montana libraries receive an excellent return on investment from participating in MSL projects, programs, or services.
IT hardware & software	MSL staff have the ability to create forms and upload electronic resources w/o IT staff intervention.	Montana librarians report improved efficiency by making use of a tool that is a one-stop source for library and State Library information.	
SLR staff outreach to and, engagement by Montana library community members.	MSL staff have the ability to collect data about programs, projects or MSL services in ASPeN.	Montana libraries use ASPeN to efficiently share information with one another creating a collaborative knowledge base that improves efficiency of service delivery for all libraries.	
	MSL staff use ASPeN to share information with Montana libraries.	IT staff are able to reallocate former programming time to other services.	

		<i>ASPeN is architected to make efficient use of data and IT resources, eliminated the need to create and maintain redundant IT systems.</i>	
		<i>State Library staff make data driven decisions about the services and resources we offer based on information that is effectively and efficiently managed through ASPeN</i>	

- Implement F5 Web Application Firewall

<b>Inputs</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Impacts</b>
IT staff	The F5 Web Application Firewall configuration policy is fully operational across the State Library's web platform <ul style="list-style-type: none"> <li>- <i>F5 was implemented and operational but had to be turned off temporarily to make changes to ESRI urls that are not compatible.</i></li> </ul>	MSL websites and applications are protected from malicious activity with state-of-the-art technology that meet's State of Montana security standards.	MSL staff, patrons and partners have ready access to the information they need without disruption.
		MSL staff efficiently manage data collections and web resources without disruption and the threats of data manipulation or loss	

# Montana State Library Digital Library Work Plan January 2017

Green (no font distinction) – activity progressing as expected.

Yellow (*italicized*) – activity may be delayed but the delays do not necessarily rise to the level of Commission concern

Red (**bolded**) – activity is delayed and Commission attention is warranted

Blue (underlined) – addition or change to the original work plan.

## Strategic Framework – Foster Partnerships

### Activities:

- Develop or purchase an updated request-tracking tool to ensure consistent tracking of patron requests across the library and to enable better agency wide outreach planning and information product development.
  - I have tagged this as green for now because we do not have any benchmarks or milestones (or even a target completion date) determined yet. That should be a minimum target to reach before the next commission meeting to keep this from changing to yellow

Inputs	Outputs	Outcomes	Impacts
Staff time to identify requirements.  Developer time and/or funding depending on what type of solution is identified	Any easy to use tool that can be used by all MSL staff to track calls, visits, and other types of patron requests  Training and Documentation	Staff track requests in a consistent manner which allows us to better understand how users access and use MSL tools and services  Staff use the tool to document requests consistently	Patrons see value in MSL services  Partners seek to have their data accessed and exposed through MSL discovery tools.

Define Requirements, Workflows, Processes, and Stakeholders	Reporting Mechanism Knowledgebase Maintenance Plan	Increased knowledge of our users	Staff are better able to allocate resources  Staff are more responsive to user needs  Users have access to MSL's expertise and curated information to resolve their needs
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- Develop a Digital Library plan for structured outreach activities across the Digital Library that guides the activities of the GIS Coordinator, the Outreach and Electronic Resources Librarian, the Montana Natural Heritage Program Coordinator, and the Digital Library Administrator.
  - User Services has outlined work group responsibilities, which is a necessary first step for this outreach planning. Similar to the request tracker project we need to have more specific target dates in place before the next commission report.

Inputs	Outputs	Outcomes	Impacts
Staff time to identify outreach priorities  Inventory of existing, regularly attended events (MAGIP, NSGIC, MACO, etc)  Listing of upcoming and other known activities we would like to participate in	A plan that identifies attainable outreach goals for the remainder of the fiscal year with a process for reviewing, updating, and extending the plan through FY18.  Prioritized list of events and activities with the break between what we do and	Digital Library programs are more coordinated in their outreach effort and more deliberate in making decisions on which events to attend, activities to offer, and trainings to host.  Consistent presence at events.  Better distribution of activities throughout the year to reduce stress	Currently the biggest limitation on the usage of MSL resources is that users do not realize what is available or do not understand how to use it. Coordinated, deliberate outreach should allow us to maximize engagement possible given existing staffing and budgetary constraints.

<p>Outreach, training, travel budget available for outreach activities</p> <p>Define stakeholders we would like to engage with.</p>	<p>don't have funding for identified.</p> <p>A core set of outreach materials that can be easily customized or supplemented for specific events.</p>	<p>at high activity times (around MAGIP, NSGIC, MACO conferences/meetings)</p> <p>Staff have the materials they need and are comfortable and prepared to discuss Digital Library products and services appropriate to the stakeholders they are engaged with.</p>	<p>Increased use of Digital Library products and services</p> <p>More partnership opportunities as agencies and organizations better understand how our work can complement the work that they do.</p>
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- Make the Natural Resource Information System Advisory Committee active again and update the NRIS Core Funding MOU.
  - We need to fill open NRIS Advisory Committee seats (DNRC, Dept of Ag) before the end of March to ensure an update MOU is signed by June 30. Should target April 30 as a deadline for having a draft updated MOU to distribute among partner agencies.
- Develop partnerships beyond NRIS data partners to enhance State Publications, Natural Resources, and MSDI Collections (Professional Development as well?)
  - This is a longer-term project. While I think we can be having some discussions with partners now, I think some of this will follow the initial NRIS Advisory Committee meetings.

<b>Inputs</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Impacts</b>
<p><i>Staff and agency rep time to meet, review existing MOU, and create a framework for updating or creating a new agreement</i></p>	<p><i>An updated memorandum of understanding between NRIS and core funding agencies that may also be used to encourage other non-named agencies to partner with and support MSL programs and services</i></p>	<p><i>MSL better understands the needs of partner agencies and agency NRIS Advisory Committee representatives are more informed of MSL resources.</i></p> <p><i>Agency NRIS AC representatives are comfortable communicating with staff in</i></p>	<p><i>A supportive set of core partnerships that serves as the foundation for establishing additional funding and data source partnerships.</i></p>

		<p><i>their agencies and with their partners about MSL has to offer.</i></p> <p><i>Usage of MSL resources increases and time spent explaining the value when invoices are sent to partners is minimized</i></p>	
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- Create new MARC records for electronic resources for digitized state publications.
- Clean up existing MARC records for print state publications.

Inputs	Outputs	Outcomes	Impacts
<ul style="list-style-type: none"> <li>• <a href="#">Jim Kammerer will work with MSC staff and Kenny Ketner to establish project roles and responsibilities for creating new records and cleaning existing records.</a></li> <li>• <a href="#">Project team will decide how to store MSC records for non-circulating print items that have been digitized.</a></li> <li>• <a href="#">Standardize the hyperlink text in the 856 field for all records.</a></li> <li>• <a href="#">Delete records for print items that cannot be</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Revised SIRSI template for how MSL and State Government Information Center (SGIC) items are cataloged.</a></li> <li>• <a href="#">Items in home location of STATE-PUB will switch to ONLINE.</a></li> <li>• <a href="#">SGIC collection will grow in size.</a></li> <li>• <a href="#">Makes MARC records for electronic resources available for import by any library, not just MSC libraries.</a></li> <li>• <a href="#">Global access to state publications.</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Cleaner, more accurate library catalog records.</a></li> <li>• <a href="#">Better user experience; less confusion about what is available from catalog.</a></li> <li>• <a href="#">Absence of circulation protects print state publications from possible loss, damage.</a></li> <li>• <a href="#">Fewer interlibrary loan (ILL) requests for already digitized items.</a></li> <li>• <a href="#">MSL collection shifts to more digital content, which aligns with collection development policy preference for digital over print content.</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">By reducing barriers to information access a higher level of transparency in state government is achieved</a></li> <li>• <a href="#">Improved information discovery aides research critical for decision making processes.</a></li> <li>• <a href="#">Improved collection management strengthens partnerships with existing and potential MSC and state depository library partners.</a></li> </ul>



<a href="#">found and have an equivalent record for digital version.</a>			
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## Strategic Framework – Create a useful information infrastructure

### Activities:

- Update the Montana Cadastral Application
  - Initial planning steps are under way. I only made this one yellow because I am concerned about the potential for the new DOR Non-disclosure rules to impact the data exchange and thus complicate the development process – I very much hope it will not play out that way.
  - Like the Request Tracker, we do not have any benchmark's or milestones (or even a target completion date) determined yet. That should be a minimum target to reach before the next commission meeting.

<b>Inputs</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Impacts</b>
<p><i>Info Products, Land Info, and IT Staff time</i></p> <p><i>Input from the Department of Revenue and users</i></p>	<p><i>A more robust cadastral application that we are able to maintain with existing, in house staff and update as needed without a full re-write</i></p>	<p><i>A reduction in the number of recurring complaints and bug reports</i></p> <p><i>An increased ability to be responsive to user suggestions for improving the application</i></p>	<p><i>As one of the most used applications in Montana state government, the cadastral application is a natural opportunity for us to reach out to and engage users. The first step in doing this is ensuring that the application itself is well designed and reliable.</i></p>

- Standardize drought and water supply map data reporting
  - Troy? – Like the Request Tracker, I have tagged this as green for now because we do not have any benchmark's or milestones (or even a target completion date) determined yet. That should be a minimum target to reach before the next commission meeting to keep this from changing to yellow

<b>Inputs</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Impacts</b>
<p>Staff - Primarily WIS Manager</p> <p>Staff - IT (web programming)</p> <p>Copyright/ownership/terms of use (for products such as PRISM, VegDri, etc.)</p> <p>Storage space (possibly database)</p> <p>Discussion/coordination with DNRC and Gov. Drought and</p>	<p>single webpage delivering the data/maps/products used to produce the monthly drought status map</p> <p>list of products used by the Drought Committee to make the monthly map</p> <p>model to aggregate drought-related data/maps/products</p>	<p>monthly drought status map is produced in objective manner</p> <p>users understand why a county is assigned a particular drought category (transparency)</p> <p>DNRC Drought Coordinator and Gov. understand when to issue a "drought alert" and "severe drought" to local governments and they have the data supporting the decision.</p>	<p>drought map is produced more effeciently (committee members spend less time each month)</p> <p>products used to create the monthly drought map are readily available to watershed groups and other interested parties (broadened usage of WIS)</p> <p>Montana's drought status map directly feeds into the US</p>

Water Supply Advisory Committee	documentation of how the monthly drought status map is produced		Drought Monitor (US Drought Monitor uses the data best for Montana)
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# Montana State Library

## Statewide Library Resources – Library Development Work Plan

### January – June 2018

Green (no font distinction) – activity progressing as expected.

Yellow (*italicized*) – activity may be delayed but the delays do not necessarily rise to the level of Commission concern

Red (**bolded**) – activity is delayed and Commission attention is warranted

Blue (underlined) – addition or change to the original work plan.

#### Strategic Framework – Foster Partnerships

##### Activities:

- Development of an informational packet/website for new and joining Montana Shared Catalog directors.

Inputs	Outputs	Outcomes	Impacts
Time of Bobbi deMontigny and Amy Marchwick	Informational Packet or website section that contains info for all MSC directors	Better understanding among new and joining directors	Ultimate impact - a more robust service for those who want it.
MSC Knowledge	Directors (New to MSC or interested) receive an introductory document to help them understand what the MSC is and what to expect when transitioning from their current ILS to the MSC	Easier transition into MSC Membership for New members	MSC Staff are more effective and efficient in their work
Data gathered from MSC ticket system		MSC staff spend less time on basic review	Library directors are better served and more well-informed

			about their responsibilities and options
Videos & Training materials already created (will be linked in)		MSC staff have more time to develop standards, training, and new services	Library directors can make an informed decision when seeking membership in the MSC
			Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)
			Collaboration that is respectful and polite (LDSTF)

- Analyze the Montana Shared Catalog’s Partners’ sharing group in order to better understand the impacts of fulfillment expansion.

Inputs	Outputs	Outcomes	Impacts
Jessie Goodwin – research and presentation time	Report on fulfillment expansion	Increased knowledge of potential regarding fulfillment expansion	MSL staff will know with certainty whether sharing group expansion is viable
	Report is presented to membership and executive board	Members increase knowledge of challenges and opportunities regarding sharing group expansion	MSC member libraries will be more informed regarding sharing group membership
			Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)
			Library infrastructure that encourages consortial resource sharing to make information

			resources, technology and service delivery more efficient, effective, affordable, customizable, sustainable, scalable (LDSTF)
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- Development of a series of short tutorials for new public library directors.

Inputs	Outputs	Outcomes	Impacts
Jo Flick and Pam Henley – time writing scripts and producing tutorials	10-15 tutorial segments - OUTLINED	New Directors complete series so they understand critical need-to-know MT-specific information within the first few weeks on the job	Communities will have excellent library service with no disruption during leadership transition
Adobe license	Data: # of new directors completing series, # of times each segment is accessed, # of initial consultant visits where time is spent on other issues	New Directors will understand their new role better, feel more confident, know where to find critical information so they are not overwhelmed and are more likely to stay	Library directors become engaged and active in MT library community, leading to thriving libraries in local communities
Server space to host	No solution determined yet	New Directors will know where to reference MT-specific information to avoid confusion and missed opportunities	Library directors who manage library resources efficiently (lean management) (LDSTF)

- Create civil engagement “program-in-a box”

Inputs	Outputs	Outcomes	Impacts
Time of Sara Groves and Lauren McMullen	Civil engagement “program-in-a-box” Needs assessment survey open to librarians. Contact with	Citizens learn from exchanging different points of views	Libraries are leaders in creating thriving communities (LDSTF)

	possible presenter for first program (fall 2017).		
Nationwide models/research for civil engagement programs	Library usage of the program Inventory and analysis of program models from other library systems.	Citizens feel more connected, have a greater sense of belonging in community	Communities are safe, peaceful, thriving
Materials		Citizens become more involved in community life.	Lifelong learning that supports community engagement inside and outside the library, fostering engagement in the world and empowering an informed citizenry. (LDSTF)
		Communities turn to the library when civic issues arise	

- Increase in outreach efforts for the Montana Memory Project.

Inputs	Outputs	Outcomes	Impacts
Time of Jennifer Birnel	Demonstrate use of the MMP and share content	Montanans become aware of the MMP and learn how to use it as a research resource and for pleasure	Montanans feel a sense of connection to their community
Time of Museum and Library Directors	Share information about their institution	Montanans become more aware of local libraries and museums and the services they offer	Montanans value and support making heritage materials accessible

Time of Volunteers	Number of fairs attended	Montanans learn how to find historical and genealogical information of value to them	More interest may lead to more digital collections being added to the MMP
Booth rental fees	Number of people who stop by the booth	Montanans become more aware of volunteer opportunities	Montanans value the preservation of heritage materials
Supplies & equipment for the booth (inc. technology)	Number of website demonstrations	Montanans learn about their community/region's history	More Montanans choose to volunteer at local libraries and museums
Marketing materials	Number of marketing items distributed		Montanans gain sense of self through historical content from their family/community/region/state
			Lifelong learning that supports community engagement inside and outside the library, fostering engagement in the world and empowering an informed citizenry. (LDSTF)

- Engage Montana library community in identifying how federations can help implement the Library Development Task Force Recommendations

Inputs	Outputs	Outcomes	Impacts
Time of Tracy Cook and Jennie Stapp	Task force to review federations	MSL staff understand the value of the federation model to librarians.	Librarians are leaders in creating thriving communities (LDSTF)



Time of participants	Recommendations that identify how federations can help with library development		Collaboration that creates a shared resource platform that libraries contribute to in order to help address specific needs. (LDSTF)

### Strategic Framework – Secure sufficient and sustainable funding

#### Activities:

- Develop economic models for libraries

Inputs	Outputs	Outcomes	Impacts
Time of Lauren McMullen	Develop a publication describing different economic/governance models for public libraries.	Library directors and board members learn about different economic models.	
	Library directors and board members use this publication	Libraries use this information to evaluate and improve their governance structures (LDSTF)	

- Help librarians and board members develop the skills and confidence to seek additional funds for the library.

Inputs	Outputs	Outcomes	Impacts
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Time of Tracy Cook	Develop or share resources about seeking additional funds	Library directors and board members understand their role and how to plan for and seek increased funding from a variety of sources	Libraries receive more funding – either receiving grants or increasing their overall budgets
	Develop trainings about seeking additional funds	Librarians and trustees are listening to their community and thinking creatively about services and resources that would gain/secure funding	Librarians and trustees are more creative in the use of the funding so the library has more resources or more collaboration
		Librarians and trustees understand what people think the library does and where the funding goes	Libraries are leaders in creating thriving communities (LDSTF)
		Librarians and trustees are proactive in articulating their value and securing funding rather than reacting to possible cuts	Governance and funding is supported through librarians and boards that aren't afraid to ask for the resources they need and who seek creative sources of funding. (LDSTF)

### Strategic Framework – Create a useful information infrastructure

#### Activities:

- Increase the bandwidth for libraries who are currently participating in e-rate.

Inputs	Outputs	Outcomes	Impacts
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Time of Suzanne Reymer	# of libraries who participate in project	Participating libraries start moving towards national goals for bandwidth	Public access technology that supports technology, digital literacy and digital inclusion (LDSTF)
Time of participants	How much bandwidth is increased	Library users can do online learning, job skills/interviews, communicate with others, gaming video	Library users obtain degrees; jobs; and/or new job skills
Data from USAC	Dollars from program	Library users report increased satisfaction with new Internet speeds	

- Evaluate the OCLC Group Services Contract

Inputs	Outputs	Outcomes	Impacts
Time of Cara Orban and Tracy Cook	Recommendations for the OCLC Group Services Contract	Identify whether or not OCLC is essential for libraries	Libraries save money that can be used for other services.
Time of Network Advisory Council Work Group	Cara Orban – analyzed OCLC usage - COMPLETED	Identify what value OCLC adds for libraries and patrons	Patrons continue to have as much access as possible to materials they need for education and entertainment
Data from OCLC	Jennie Stapp, Cara Orban, and Tracy Cook met with OCLC representatives to discuss contract options - COMPLETED	If we determine that OCLC is non-essential for a certain type and/or size of library, identify how to maintain the affordability of the contract for those libraries who wish to continue using OCLC products.	Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)
Data from libraries			Library infrastructure that encourages consortial resource sharing to make information resources, technology and service

			delivery more efficient, effective, affordable, customizable, sustainable, scalable (LDSTF)
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- Develop a centralized acquisitions pilot project

Inputs	Outputs	Outcomes	Impacts
Data from libraries: Amount of money currently used for materials purchasing and staff processing time	Acquisitions module configured for staff	Library directors and staff learn about the value of centralized acquisitions.	Montana libraries are more innovative
Data from MSC staff: Amount of time MSC staff spend maintaining/building current non-centralized acquisitions	Tracking of purchasing [built into Acquisitions module]	Directors and staff working together to find meaningful ways to repurpose staff	Montana library users have access to a wider variety of materials and services
Data from other Centralized Acq consortia: Volume of participants to allow for cost breaks from the vendor	Accounting of staff time - new projects made possible because of money or time	Centralized acquisitions creates a better MSC system.	Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)

Time of Jemma Hazen and staff coordinating MSC libraries and negotiating contracts	Demonstrated cost savings to participating libraries	MSL Staff learn whether or not Centralized Acquisitions has value for more libraries beyond the pilot	Library infrastructure that encourages consortial resource sharing to make information resources, technology and service delivery more efficient, effective, affordable, customizable, sustainable, scalable (LDSTF)
Time of Central Services?	Demonstrated cost savings to participating libraries		

**Montana State Library**  
**Statewide Library Resources – MT Talking Book Library Work Plan**  
**January – June 2018**

Green (no font distinction) – activity progressing as expected.

Yellow (*italicized*) – activity may be delayed but the delays do not necessarily rise to the level of Commission concern

Red (**bolded**) – activity is delayed and Commission attention is warranted

Blue (underlined) – addition or change to the original work plan.

**Strategic Framework – Foster Partnerships**

**Activities:**

- Improve Customer Service by developing a streamlined interview process for new users.

<b>Inputs</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Impacts</b>
Christie Briggs, Martin Landry, Jackie Crepeau, GG Waldburger, Erin Harris, Bert Rinderle	Develop an easier interview process to benefit new user understanding of MTBL services 2/27/17-Interview worksheet revised	A streamlined customized MTBL service for users to understand and enjoy long term.	<u>Improve quality of life of users, increased enjoyment, independence, productivity and knowledge</u>
MTBL Knowledge	Develop an audio tutorial for MTBL service options as a tool for new users, making the transition to each new service easier for users.	New users better understand services and staff are more effective and efficient	<u>Increase opportunities for users and reduce discrimination by connecting people with impairments to</u>

			<a href="#">society through MTBL partnerships</a>
Videos & Training materials	Trained volunteers record a tutorial and staff send one with a digital player to each new user after initial interview	MTBL staff have more time to develop policies, training, and new services for users who are better served and well-informed on MTBL service options	<a href="#">Satisfaction in contributing to society and participating in civic engagement that make a difference</a>
Volunteer Skills	Follow-up calls by trained volunteer(s) to new users to evaluate success and staff make appropriate adjustments	New users make informed decisions, enjoy services and connect with more resources	<a href="#">Increased happiness of users spreads to families, caregivers, facilities which leads to increased productivity and independence</a>

- Installation of a second recording booth to improve the recording program.

Inputs	Outputs	Outcomes	Impacts
Staff time Christie Briggs, Erin Harris, Recording Volunteers	A second modular recording studio that meets National Library Service standards for production quality <a href="#">and ADA standards and current codes</a>	MTBL users report increased satisfaction due to improved access to Montana titles and authors. Improved quality of Montana recordings, opportunities for volunteer recruitment and outreach about MTBL's recording program	<a href="#">Improved quality of Montana recordings, increase user enjoyment, opportunities for volunteer recruitment and outreach about MTBL's recording program</a>

Modular sound booth from Eckel, Inc.	Increased staff and volunteer time devoted to local recordings.	An increasing number of MTBL recordings are available to MTBL users nationwide through the BARD program.	
Construction performed by the General Services Division and Diamond Construction under contract to GSD.	<a href="#">Volunteers and staff enjoy an improved and expanded recording program environment</a>	Increased number of locally produced records and elimination of the backlog of locally recorded items awaiting post production	
Time from Philip Carbo, Audio Specialist, National Library Service, to inspect the new sound booth	2/02/2017 Completed booth audio inspection; <a href="#">inspection of entire recording environment recommended when overall project is completed.</a>		
An estimated budget of <a href="#">\$112,000</a> from the Montana State Library/MTBL Trust.			

- Outreach to increase awareness and utilization of MTBL services

<b>Inputs</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Impacts</b>
Staff knowledge	Increase in new users and utilization of MTBL services	Non-users increase awareness of MTBL services and now utilize them	Improve quality of life of users, increased enjoyment, independence, productivity and knowledge



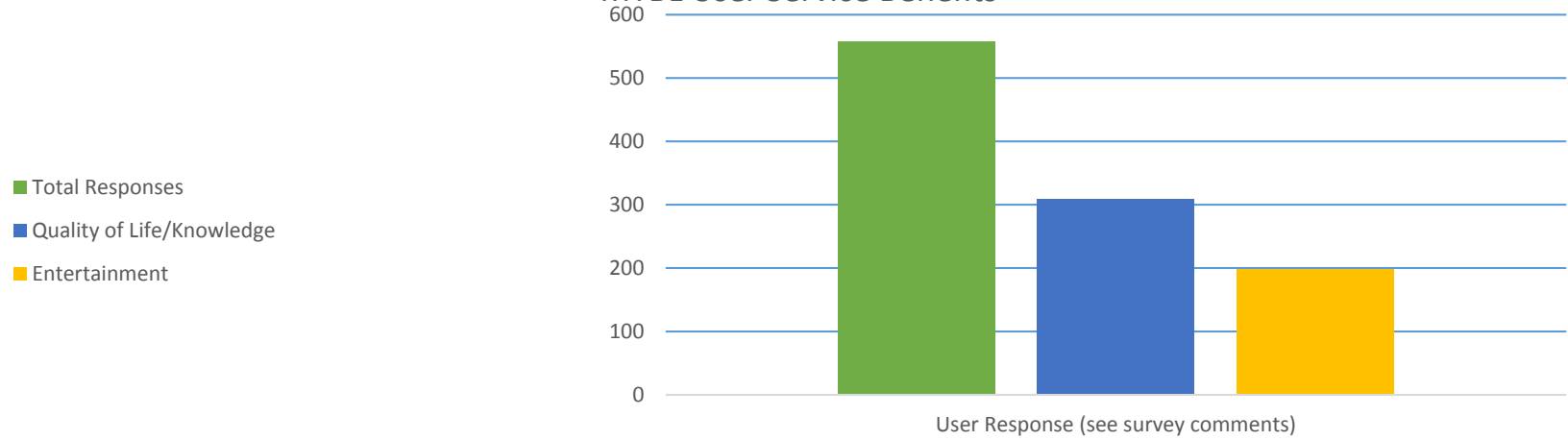
Partnerships	Widen opportunities for public presentations and distribution of information materials to increase knowledge of MTBL services	Increased referrals from the public, private and public organizations, and professionals	Increase opportunities for users and reduce discrimination by connecting people with impairments to society through MTBL partnerships
Volunteers	Increase public awareness of MTBL services	Increase in knowledge of volunteer opportunities	Satisfaction in contributing to society and participating in civic engagement that make a difference
Staff expertise	Staff impart MTBL service information and options to users in understandable, concise ways	Users are confident in choosing and utilizing MTBL services and knowledgeable about additional accessible resources	Increased happiness of users spreads to families, caregivers, facilities which leads to increased productivity and independence

- Outreach to Users to assess service satisfaction and improvement needs

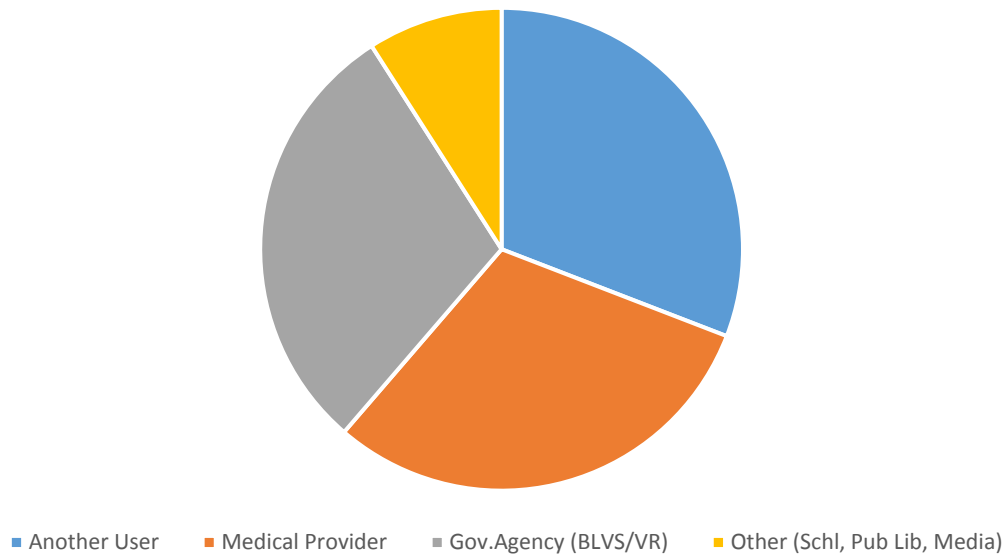
Inputs	Outputs	Outcomes	Impacts
MTBL Staff	<a href="#">Develop a user survey</a> to assess established user feedback. 10/30/2016 completed.	User survey comments: MTBL services provide users with- sharpened mental acuity; continued contact with the world; connection to own community; being current with own professional literature; improved quality of life	Users are confident their library needs are being understood and met

MTBL Staff Knowledge	Analyze results and focus on areas needing change 1/25/2017 completed.	Staff increases knowledge of results, challenges and opportunities in service; identifies areas for improvement.	Users' quality of life is improved
Christie Briggs- Report and presentation time	Report results to users, MSL managers (03/09/2017), National Library Service (06/14/2017), MSL Commission (partial survey report charted below 03/09/2017)	Better understanding and support of MTBL user needs and satisfaction in customer service. Users have access to Services through improved outreach efforts	Users have knowledge of and access to MTBL services when needed
Volunteer Skills	Assist MTBL staff in compiling accurate user data	Gain knowledge of all MTBL services and computer skills. Positive experiences resulting in outreach to community and personal satisfaction of civic engagement.	

### MTBL User Service Benefits



### How Users Learned About MTBL



## Strategic Framework – Create a useful information infrastructure

### Activities:

- Upgrade WebOpac to improve the quality of user accessibility and independent navigation of online catalog.

Inputs	Outputs	Outcomes	Impacts
Martin Landry, Christie Briggs	<u>Schedule</u> Upgrade with Keystone Automated Library Systems. 3/1/17 Done.	Staff trained in the upgraded catalog options and are knowledgeable and confident in training online users	<u>Users enjoy improved online catalog access and search capabilities</u>
Staff Knowledge	Announcement to users through newsletter, social media and one-to-one training	Staff train users. Users are more confident, know where to find critical information, are not overwhelmed and are more likely to repeat positive online experiences	Users have excellent accessibility of online library collection leading to more independence, are engaged and active in MT library community
Martin Landry, Christie Briggs	Monitor and assess upgrade through user feedback	Report glitches for Keystone to resolve to staff and user satisfaction. Staff manage library resources efficiently and effectively	<u>Users have more options in how services are accessed and utilized.</u>

- Develop a Braille and Audio Reading Download (BARD) R-Sync storage system for duplication on demand

Inputs	Outputs	Outcomes	Impacts
MSL/MTBL staff, National Library Service staff	Customize an affordable, sustainable local data storage system for easier access to the NLS BARD collection	MTBL has affordable, sustainable, secure and efficient access to NLS BARD collection and experience an increase in circulation to users	Increase in Non-BARD user enjoyment to faster receipt of preferred and reserved BARD titles
MTBL Staff knowledge	Easy and efficient access to BARD titles for duplication on demand	Staff are able to focus knowledge, skills and energy toward development of identified user support service needs	Users have access to additional MTBL services
Volunteers	Receive training in ease of access to BARD R-Sync downloading and duplication	Increased technology knowledge and skills	Volunteers achieve confidence and independence via library education and training

- Train inactive BARD personal computer users in the successful operation of BARD Express.

Inputs	Outputs	Outcomes	Impacts
MTBL Staff and NLS staff knowledge	Receive training on the BARD Express App for personal computer users. Completed 2/28/2017.	Successful training of previous BARD users with personal computers (Windows based) on the BARD Express App. 10% completed 3/10/2017.	Users are independent and satisfied with direct access, navigation and downloading BARD titles
MTBL Staff	BARD Express App Outreach to previous BARD personal computer users no longer downloading BARD titles. 10% completed 3/10/2017.	Increase in active BARD users	Previous Users have gained additional ease of access to downloading BARD titles

MTBL Staff	Can dedicate time, skills and knowledge to non-BARD users	Better customization of non-BARD user preferences for MTBL services	Non-BARD users experience increased satisfaction of MTBL Services
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A REPORT  
TO THE  
MONTANA  
LEGISLATURE

PERFORMANCE AUDIT

*Oversight of  
Discretionary Pay  
Changes for State  
Employees*

*Department of Administration*

JANUARY 2017

LEGISLATIVE AUDIT  
DIVISION

15P-05

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[ladhotline@mt.gov](mailto:ladhotline@mt.gov)

**PERFORMANCE AUDITS**

Performance audits conducted by the Legislative Audit Division are designed to assess state government operations. From the audit work, a determination is made as to whether agencies and programs are accomplishing their purposes, and whether they can do so with greater efficiency and economy.

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives. Members of the performance audit staff hold degrees in disciplines appropriate to the audit process.

Performance audits are conducted at the request of the Legislative Audit Committee which is a bicameral and bipartisan standing committee of the Montana Legislature. The committee consists of six members of the Senate and six members of the House of Representatives.

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# LEGISLATIVE AUDIT DIVISION

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January 2017

The Legislative Audit Committee  
of the Montana State Legislature:

This is our performance audit of oversight of discretionary pay changes for state employees. Discretionary pay changes are made by individual agencies under the guidance of State Human Resources Division of the Department of Administration.

This report provides the legislature information about the process for awarding discretionary pay changes to state employees outside of those directly provided by the legislature. This report includes recommendations for enhancing oversight of state employee discretionary pay changes by the Department of Administration, and recommendations to the legislature for clarification of statute related to pay adjustment analysis and usage. A written response from the Department of Administration is included at the end of the report.

We wish to express our appreciation to Department of Administration personnel and staff in multiple other state agencies for their cooperation and assistance during the audit.

Respectfully submitted,

Angus Maciver  
Legislative Auditor



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 MONTANA LEGISLATIVE AUDIT DIVISION

 PERFORMANCE AUDIT  
 Oversight of Discretionary Pay Changes  
 for State Employees  
 Department of Administration

JANUARY 2017

15P-05

REPORT SUMMARY

In fiscal year 2015, state employees received over \$9.5 million in additional compensation through discretionary pay changes. In Montana state government, these types of changes are administered by individual agencies with no oversight provided by the Department of Administration. Our work identified issues with the consistent application and support of discretionary pay changes to state employees, which could be remedied by a more proactive oversight role for DOA. Our work also identified issues related to statutory clarity for discretionary pay adjustments under the broadband pay plan.

## Context

Within the broadband pay plan used by the majority of agencies of state government in Montana, each agency has its own pay plan that includes criteria for properly administering and supporting discretionary pay changes. Discretionary pay changes are those that are not directed by the legislature, and are at the discretion of the agency. Audit work included reviewing a sample of pay changes across ten agencies to determine if these pay changes were being properly and consistently supported by the agencies according to their pay plans and state policy. These agencies included the Arts Council, Department of Fish, Wildlife, and Parks, Department of Labor and Industry, Office of Public Instruction, Department of Public Health and Human Services, Department of Revenue, State Auditor's Office, Secretary of State, State Library, and Department of Transportation.

In fiscal year 2015 over \$9.5 million in discretionary pay changes were granted throughout the state, as allowed under the broadband pay plan. Due to the decentralized nature of the broadband pay plan, there is no review process outside of the agencies for these pay changes, and audit work found they often did not meet the criteria established by the agencies, collective bargaining agreements, and state policy. State law requires the Department

of Administration (DOA) to encourage and exercise leadership in the development of effective personnel administration within the state agencies. This includes the pay change process under the broad band pay plan. We also identified a lack of clarity in current statute regarding the funding and analysis of pay adjustments under the broadband pay plan. There is no statutory requirement for analysis of the effects of the broadband pay plan, and a lack of clarity in how funding should be provided for pay adjustments.

## Results

We reviewed a sample of 200 pay changes and found that 173 were not properly supported. An unsupported pay change was one that did not follow the proper criteria based on agency policy, state policy, and/or union collective bargaining agreements. These 173 unsupported pay changes amounted to over \$394,000 of the total of \$503,921 in pay adjustments from the sample for fiscal year 2015. There were over 3,500 total pay changes awarded in fiscal year 2015. Instances that led to unsupported pay changes included agency pay plans that were contrary to state policy. In other cases pay plans did not include criteria for the types of changes that were being used by the agency. Presently there is

*(continued on back)*

no oversight of agency pay plans, pay changes, or entry of pay change information into the state accounting system on the part of DOA. Due to this decentralized process and limited oversight, audit work found that pay changes were frequently handled inconsistently between agencies.

This audit report makes four recommendations to improve DOA oversight of pay changes, and two recommendations to the legislature to enact legislation requiring ongoing examination, and clarification of the use of pay adjustments under the broadband pay plan. These recommendations relate to enhancing oversight and accountability for discretionary pay changes by:

- ◆ Taking a more active role in the pay change process including:
  - ◇ Clarifying state pay change policy, and
  - ◇ Providing training for pay changes.
- ◆ Establishing and implementing a biennial review process for agency pay plans based on state policy.
- ◆ Developing and implementing a pay change review process.
- ◆ Simplifying the pay change options available to agency staff.
- ◆ Enacting legislation to provide for an investigation of the effect of pay adjustments under the broadband pay plan.
- ◆ Clarifying state law on the use of pay adjustments under the broadband pay plan.

Recommendation Concurrence	
Concur	4
Partially Concur	0
Do Not Concur	0
<b>Source: Agency audit response included in final report.</b>	

For a complete copy of the report (15P-05) or for further information, contact the Legislative Audit Division at 406-444-3122; e-mail to [lad@mt.gov](mailto:lad@mt.gov); or check the web site at <http://leg.mt.gov/audit>  
 Report Fraud, Waste, and Abuse to the Legislative Auditor's FRAUD HOTLINE  
 Call toll-free 1-800-222-4446, or e-mail [ladhotline@mt.gov](mailto:ladhotline@mt.gov).



# Chapter I – Introduction and Background

## **Introduction**

In 2001, the legislature passed legislation allowing for the development of the broadband pay plan. The broadband pay plan is an alternative compensation and classification plan that takes into account an analysis of labor markets through a biennial salary survey completed by the Department of Administration's (DOA) State Human Resources Division (SHRD). In 2007, the legislature passed legislation that required all positions, with a few exceptions, be grouped into occupations and these occupations placed in bands as part of the broadband pay plan. In 2008, a state pay task force was created to work on the ongoing issues related to the implementation of the broadband pay plan. According to DOA staff this task force directed them to maintain the decentralized system that is in place today, and minimalized DOA's oversight role in the broadband pay plan. Over 80 percent of state employees are included in the broadband pay plan. The broadband pay plan is set up to provide agencies with the flexibility to develop their own pay plans using any combination of discretionary pay changes they choose to best fit their agency. This allows agencies to determine which pay rules will best fit their unique missions. DOA, and more specifically SHRD, are charged with encouraging and exercising guidance to the agencies in the creation of their pay plans.

Based on legislative interest in the ability of state agencies to provide discretionary pay changes in addition to pay changes provided directly by the legislature to state employees, the Legislative Audit Committee prioritized a performance audit of how individual state agencies apply and support these pay changes. This chapter further discusses the scope of our audit work, and provides background information on the broadband pay plan and the use of discretionary pay changes.

## **What Is a Broadband Pay Plan?**

The broadband pay plan is the pay plan that is used for over 80 percent of employees in Montana State government. It is a system for setting and adjusting the pay of state employees. The broadband pay plan is a pay plan system with nine wide pay bands with pay ranges that allow agency flexibility. Jobs are allocated to one of the nine pay bands based on classification standards developed by DOA. The broadband classification plan serves two purposes. It provides the means for identifying and grouping similar jobs to ensure internal pay equity, and matches jobs for external pay comparison. Trained classifiers at the agencies put each position into an occupation, which is then put into a pay band. DOA then identifies market midpoints for all occupations through a biennial salary survey. This analysis provides a gauge for agencies to compare the pay they are offering to relevant external labor markets. DOA then uses the market midpoints to create competitive pay zones for occupations. Agencies are not required

to use this information, and they may create their own pay ranges for the occupations in their agencies. It is up to the agencies to decide if they want to tie pay to DOA's market analysis.

State policy maintains broadband pay plan rules must be fiscally responsible, actively managed, and consistent with the agency's mission and objectives. This flexibility allows state agencies the ability to link employee compensation to the agency's mission, which gives agency managers a greater opportunity to actively manage their employees through the use of pay changes. This is in contrast to a more traditional government system which relies on years of service to determine who is in line for pay increases. The greater latitude for managers can be beneficial; however, it can also lead to a decentralized process with less accountability. Since pay changes are largely carried out at the agency level, the potential for inequities in how agencies apply pay changes across the state is increased. While discretionary pay changes at the agency level are allowable within the state's broadband pay plan, the decentralized nature of the pay plan diminishes accountability to the legislature.

### **Pay Changes Within a Broadband Pay Plan**

One of the main features of a broadband pay plan is that agency managers have more influence on pay progression and changes for individual employees. They can choose the pay change types that will best empower their employees to accomplish their mission. The pay changes should be implemented based on criteria in agency policy, state policy, and/or union collective bargaining agreements. In fiscal year 2015, and over the last several legislative sessions, funding for statutory pay increases has largely been given in either across-the-board (i.e. to all state employees) percentage increases, or across-the-board dollar amount increases. In order for the broadband pay plan to offer agencies the intended flexibility to more actively manage employees, these statutory pay increases would have to be given to the agencies in a lump sum and distributed according to the pay change options in the agencies' individual pay plans. When legislative increases are offered across the board, individual state agencies can only use pay change options in their pay plans for discretionary pay changes that are in addition to the legislative increases. This is currently how the pay change options in the broadband pay plan are being used by agencies. The across-the-board pay change currently offered by the legislature limits an agency's ability to use its pay plan to advance the agency's mission. The current system leads to limited use of pay changes, and less emphasis within the agency on how it will carry out pay changes. This, along with limited oversight, has led to inconsistencies in the pay change process in the agencies.

## Pay Change Options in State Policy

According to state policy there are different types of pay changes available to agencies to include in their pay plans. Pay changes outside of pay adjustments are not fully at the discretion of the agencies, but still affect employee pay. Pay adjustments are a type of pay change that is available to agencies to distribute at their discretion. Statutory adjustments are given to all state employees under the broadband pay plan. Table 1 shows the number of statutory pay raises that were given across the board, the number of pay changes outside of pay adjustments, the number of pay adjustments, and the costs associated with each for fiscal year 2015.

Statutory Raises	Number Awarded	Annual Cost FY15
HB 13 Statutory Pay Raises	11,148	\$ 25,282,400
Pay Changes	Number Awarded	Annual Cost FY15
Training Assignments	81	\$ 184,662
Promotions	327	1,886,851
Temporary Promotions	94	730,080
Reclassifications	137	551,554
Career Ladder	323	873,496
Other	261	493,771
<b>Total</b>	<b>1,223</b>	<b>\$ 4,720,414</b>
Pay Adjustments	Number Awarded	Annual Cost FY15
Competency	61	\$ 189,509
Market	1,913	3,704,542
Performance	203	351,291
Results	Not an Option in SABHRS	
Situational	52	78,437
Supervisory	22	81,203
Strategic	92	459,014
<b>Total</b>	<b>2,343</b>	<b>\$ 4,863,996</b>
<b>Grand Total of Pay Changes and Adjustments</b>	<b>3,566</b>	<b>\$ 9,584,410</b>

**Source:** Compiled by the Legislative Audit Division from SABHRS data.

The table shows that while not directly appropriated by the legislature, pay changes and adjustments represent a considerable annual cost to the state. Each of the pay changes has its own criteria and situation for when it is appropriate to use in state policy. This is meant to be supplemented by further criteria in the individual agencies' pay plan policies to determine when they are appropriate to use.

### **Audit Scope and Objectives**

In 2011, the legislature did not provide funding for pay plan increases for state employees for the 2013 biennium. However, under the authority granted by the broadband pay plan, agencies still granted some employees pay changes to provide for an increase in pay. Consequently, the 2013 Legislature requested information on how these pay changes were given without legislative authority by passing House Joint Resolution 17, which was a study resolution of state pay plans. Research on the broadband pay plan was carried out by the Legislative Fiscal Division (LFD) for the Legislative Fiscal Committee (LFC). LFD presented information on data related to pay plans, funding for pay increases, pay plan options, personal service analysis, and general information on pay plans. Based on LFD's work, LFC requested a performance audit to look further into the decentralized pay change process. This request was then prioritized by the audit committee. Based on audit assessment work, we determined that while state agencies do have the ability to provide discretionary pay changes as part of the broadband play plan, the pay change process is decentralized, with limited oversight provided by DOA.

As a result, we examined how state agencies apply and support these changes. This review was conducted on pay changes from fiscal year 2015. This included only those employees who are under the broadband pay plan. Audit staff also examined the distribution of discretionary pay adjustments across state agencies. Pay adjustments are a type of discretionary pay change that agencies may use to change an employees pay. Pay changes are defined as discretionary because agency staff are able to give them to employees at their discretion without specific funding from the legislature. All pay changes discussed in this report are discretionary unless otherwise specified. Based on our audit assessment work, we developed the following two audit objectives for examining and providing information on pay changes:

1. Determine if state employee pay changes are applied and distributed according to agency policy, state policy, and state law.
2. Determine the distribution of pay adjustments amongst state agencies and their employees.

## **Audit Methodologies**

To address these objectives, we completed the following methodologies:

- ◆ Obtained and reviewed statutes and state policy related to pay changes to determine requirements for discretionary pay changes.
- ◆ Obtained fiscal year 2015 pay change information from the Statewide Accounting, Budgeting, and Human Resources System (SABHRS) to create a sample for file review.
- ◆ Created a random sample of 200 pay changes that were selected proportionately from the Arts Council, Department of Fish, Wildlife, and Parks, Department of Labor and Industry, Department of Transportation, Office of Public Instruction, Department of Public Health and Human Services, State Auditor's Office, Secretary of State, State Library, and Department of Revenue. These agencies were randomly selected from all agencies with employees on the broadband pay plan. This allowed for an assessment of pay changes statewide.
- ◆ Obtained copies of broadband pay plan policy and collectively bargained union contracts for all agencies sampled as criteria for file review.
- ◆ Conducted file review at those ten randomly sampled agencies based on our random sample of pay changes to determine if pay changes met criteria.
- ◆ Conducted interviews with human resource staff at the ten agencies following the file review to answer any related questions.
- ◆ Conducted an interview with DOA staff to discuss file review findings.
- ◆ Conducted a survey of agency human resource staff in order to gauge their understanding and opinions of state employee pay changes.
- ◆ Reviewed other states' pay plan policies regarding pay changes to determine criteria for best practices.
- ◆ Interviewed DOA staff to determine what information is available in the SABHRS data of statewide pay adjustments to assist in statewide review.
- ◆ Determined the primary funding source for all state agencies' personal services and the agency in general. Information was used to determine if there was a correlation between funding and ability to give pay adjustments.
- ◆ Used pay adjustment information from fiscal year 2015 to analyze data to determine trends in pay adjustments used by agencies.
- ◆ Interviewed DOA staff regarding the results of the statewide pay adjustment data analysis to gather information about the results.

## **Report Contents**

The remainder of this report includes chapters detailing our findings, conclusions, and recommendations. It is organized into three additional chapters:

- ◆ Chapter II discusses the need for additional policy related to pay change types available to agencies, and training on how to properly support and record pay changes.
- ◆ Chapter III discusses pay plan and pay change inconsistency, and the need for oversight of agency pay changes and pay plans.
- ◆ Chapter IV provides an analysis of the statewide distribution of pay adjustments, and legislation changes needed to provide for ongoing analysis and clarification regarding pay adjustments under the broadband pay plan.

## Chapter II – Addressing Pay Change Inconsistency

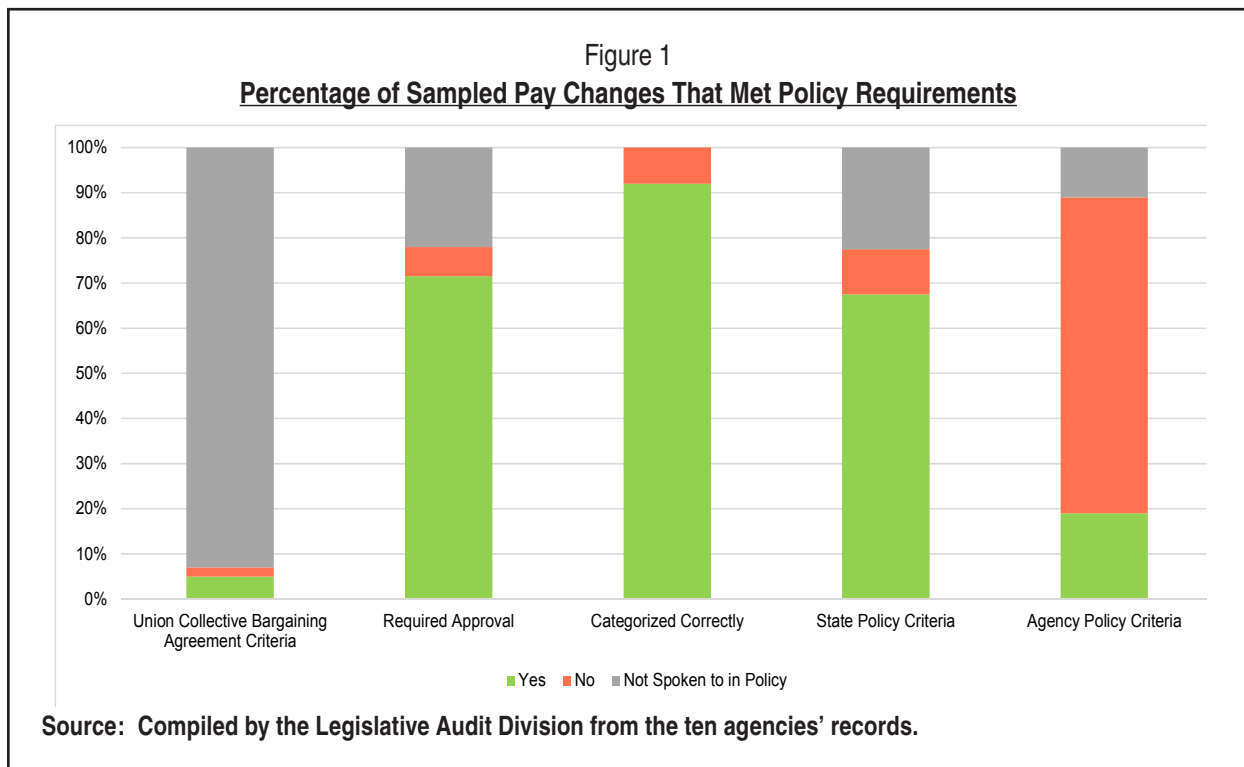
### **Introduction**

As part of our first objective, we examined how individual state agencies apply and support pay changes, based on requirements in agency pay plans, state policy, and collective bargaining agreements. We found that pay changes were applied inconsistently across the sample of state agencies reviewed. The broadband pay plan is set up to allow agencies the flexibility in their individual pay plans to decide what types of pay changes they will use, and to a large extent, how they will be carried out. We found that the current level of guidance provided by Department of Administration (DOA) is not leading to consistently supported pay changes in state agencies. Currently, there is confusion within the agencies as to how to properly implement and support pay changes based on state and agency requirements. Our work indicated that DOA should clarify through state policy what pay change types are available to the agencies, and the criteria associated with each. The current system for pay changes is being carried out based on agency policy that is not actively managed, unclear state policy, and by agency employees that are in some cases not properly trained on how to support pay changes. Our work identified the need for DOA to provide additional guidance for state agencies when using pay changes. Agencies must be receptive to DOA guidance in order for them to correct agency-level documentation to properly support pay changes. This chapter presents our findings and recommendations in this area.

### **Pay Change File Review Found Inconsistencies Across State Agencies**

Each agency has its own pay plan that allows it to decide which pay change types it wishes to use. Each individual agency is then responsible for documenting pay changes to show that they meet the agency's pay plan policy, state policy, and union collective bargaining agreements (CBA). This information is kept in each employee's personnel file to verify that the pay change was justified. For example, a performance pay change would require a copy of the performance evaluation that led to the pay change as well as any other documentation required by that agency's pay plan policy. The documentation required by the agency pay plan differs between agencies. That level of decentralization without oversight has led to inconsistencies in the application and support of pay changes. In order to better understand the pay change process at the individual agencies, audit work included a review of a sample of pay changes. This consisted of reviewing 200 randomly sampled pay changes from ten randomly sampled agencies. The 200 randomly sampled pay changes were chosen based on each

of the ten agencies proportion of the total number of pay changes statewide in fiscal year 2015. This allowed audit staff to review pay changes from a variety of agencies in order to determine if they were properly supported based on agency policy, state policy, and union CBA. Union CBA superseded state and agency policy where they conflicted, and state policy superseded agency policy when establishing criteria for the review. This review included large and small agencies with a variety of funding sources and management structures. Audit work determined that pay changes are supported with little documentation, so human resource staff could not always demonstrate pay changes followed agency pay plan policy, state policy, and union CBA. There was also general confusion among agency staff as to what situations required which type of pay changes. Agencies in some cases had differing criteria for the same pay changes. This led to an inconsistent application of pay changes across the state. The following figure represents the different areas in which file review found issues with agency pay changes.



## File Review Results Show a Large Percentage of Unsupported Pay Changes

The figure above represents the results of the file review when evaluated against each source of criteria. Overall, the file review found inconsistent support for pay changes throughout the sample. The following bullets represent each of the criteria sources, and



if support documentation for the pay changes satisfied the various requirements for proper support of pay changes.

- ◆ Union Collective Bargaining Agreement Criteria
  - ◇ CBA rules create criteria that must fall within statutory limitations, but supersedes agency pay plans. It was not common for the CBA to speak directly to pay changes, and this is represented by “Not Spoken to in Policy” in the figure. This made it rare for there to be criteria in the CBA to compare against for the file review of pay changes. Issues found with regard to CBAs were centered around incorrect effective dates for reclassifications that led to a pay change. For example, the Department of Health and Human Services (DPHHS) had a reclassification with an effective date after the first day of the pay period that is required by the CBA, meaning that the pay change went into effect after the date policy required.
- ◆ Required Approval
  - ◇ Based on the agency, there was approval required from different management at the agency if it was required at all. This ranged from the director to the manager of the employee receiving the pay change. Approval for pay changes was only required in eight of the ten agencies’ pay plans, and only for some types of pay changes in the agencies that did require it. Those pay changes that did not require approval are represented by “Not Spoken to in Policy” in the figure. In general, agencies satisfied this requirement, but the fact that it was only required by some agencies, for some types of pay changes, creates another inconsistency and lack of oversight.
- ◆ Categorized Correctly
  - ◇ Audit work found that 8 percent of pay changes were not categorized correctly in our sample based on definitions in state policy. This means that based on the situation, the correct pay change type was not entered into the Statewide Accounting, Budgeting, and Human Resources System (SABHRS), which serves as the record for pay changes. This can lead to incorrect support for a pay change based on the wrong criteria, as well as errors in the SABHRS statewide data on pay changes.
- ◆ State Policy Criteria
  - ◇ This criteria was available for most types of pay changes. However, it does not speak to pay changes such as career ladder changes, which are used by some agencies. Pay change types that were not spoken to in state policy are represented by “Not Spoken to in Policy” in the figure. For other pay change types state policy offered limited criteria. Agencies failed to meet the limited state policy in some cases. For example, the State Auditor’s Office had a performance adjustment without any documentation to determine if state policy criteria was met. State policy was limited in guidance of how to properly support the various pay change options, and in some cases agency staff indicated they found it difficult to determine the difference between the types of pay changes.

- ◆ Agency Policy Criteria
  - ◇ This criteria was the reason why a large portion of the pay changes fell short of proper justification. We found 140 pay changes that did not meet the criteria established in agency pay plan policy. There were also 22 cases in which a pay change type was awarded even though the agency's plan did not include that type of pay change. This means that there was no established criteria for that pay change type at the agency level, and thus it could not be determined if it was properly justified. For example, the Department of Revenue did not have policy for strategic adjustments even though it used this type of pay change. This is represented by "Not Spoken to in Policy" in the figure. Oversight by DOA will help agencies more consistently support their pay changes, but agencies are still responsible for interpretation and compliance with their agency pay plan policies.

We found that 173 out of 200 (86.5 percent) of the changes in pay were not properly supported. Our work identified numerous inconsistencies among agencies regarding what criteria they required to justify a pay change, if there was criteria at all. These issues stem from limited state policy outlining what type of support is required for pay changes.

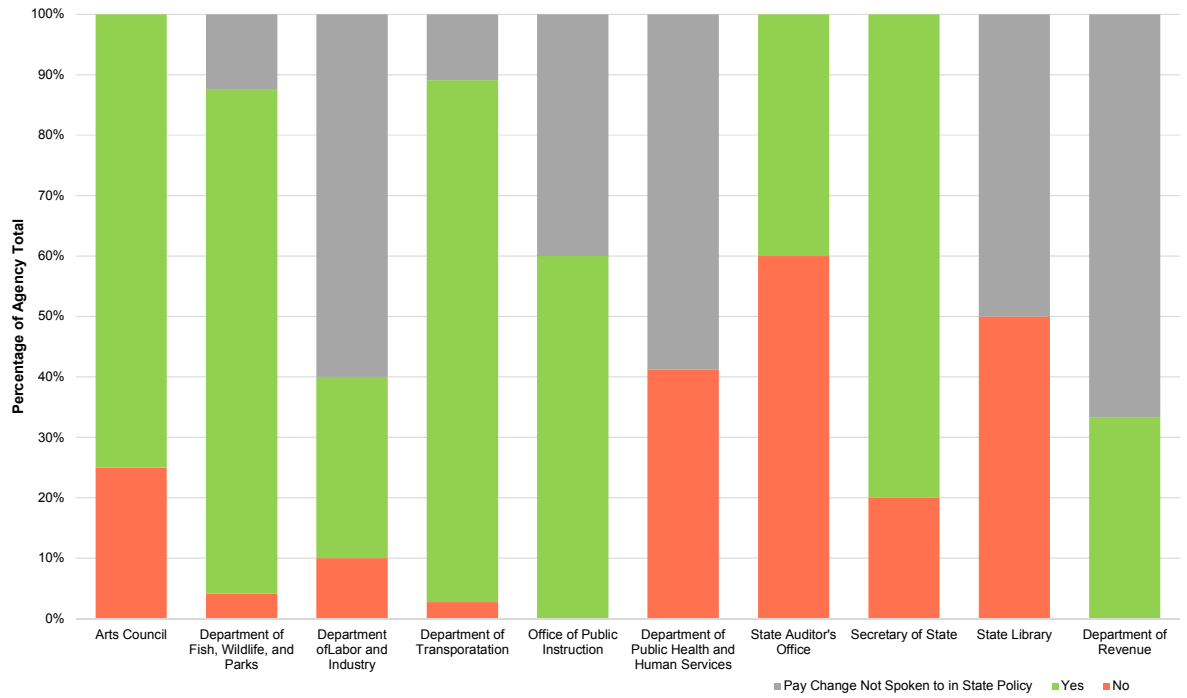
### **DOA Provides Limited Guidance Regarding Proper Pay Change Procedure**

The file review established the basis for the findings made regarding the inconsistent application of pay changes at the agency level. This resulted, in part, from a lack of clear guidance from DOA and agency knowledge regarding proper pay change support. This contributed to agency pay change processes that do not properly support pay changes. Since Montana has a system in which pay changes are carried out exclusively by the agencies, it magnifies the importance of clear guidance on how pay changes should be carried out. Since state policy is not clear, proper support for pay changes has been left up to the interpretation of the individual agencies. This has resulted in pay changes with limited documentation, and some that are not documented at all. For example, in our review we found that DPHHS gave across-the-board situational adjustments to everyone in a certain position at a regional office. According to staff this was done to alleviate union employee concerns that an individual with less experience was started at a higher wage in that position, or to alleviate recruitment and retention issues. There was no documentation to support the pay change, nor determine why it was given. If it was to alleviate recruitment and retention issues it was also categorized incorrectly, and likely should have been a strategic adjustment.

According to DOA, the list of pay changes in state policy are categories under which agencies can create pay change types in their agency pay plan policies. We found that agencies mainly use the pay change types in state policy. This is contrary to DOA's representation that state policy has pay change categories. This ambiguity by DOA highlights the need for improvement in state policy to provide more specific guidance to agencies regarding what pay change types they can include in their pay plans. We also found that there are fewer pay change options available in SABHRS than in state policy. Agency staff have to choose a pay change option when entering the pay change information into SABHRS. Agency staff have a list of pay change types available to them in SABHRS when they are recording a pay change. If there are more pay change types available to agencies in state policy than in SABHRS this further creates inconsistency. In these cases, agencies do not have a way to accurately report those pay changes in SABHRS.

Figure 2 (see page 12) shows there were considerable differences between pay change criteria in state policy, and the support and type of pay changes used by the agencies. Those cases when audit work determined that a pay change was "Not Spoken to in Policy" it meant that the type of pay change used by the agency did not have criteria for proper support in state policy. In these cases state policy did not establish base criteria for support of the pay change, so it was at the discretion of the agency to decide what constituted proper justification. A "No" means that the documented support the agency had for the pay change did not meet the criteria established by state policy.

Figure 2  
Percentage of Pay Changes That Met State Policy Requirements  
 Agencies Reviewed



Source: Compiled by the Legislative Audit Division from the ten agencies' records.

### Inconsistency in Agency Use and Interpretation of Pay Change Policy

Interviews with agency staff responsible for pay changes made it clear that there was confusion about the various types of pay changes in state policy. In some cases they indicated that the differences between different types of pay changes were unclear. For example one interviewee indicated they consider performance and competency adjustments to be essentially the same thing. State policy indicates that competencies must be identifiable, observable, measurable, and comparable to like positions for internal equity, while saying that performance adjustments must have a corresponding performance appraisal that supports the pay change. This makes it difficult to determine what scenarios require which pay change types.

In other cases it was unclear what type of pay change was being used by the agency. DPHHS had several pay changes that were unclear as to why the type of pay change listed in SABHRS was selected. Staff could not explain why the specific pay change type was selected in SABHRS, and the pay change support was not thorough enough

to provide any clarification. This partially stems from a lack of base support established by state policy that must be included in agency pay plans. Agency responsibility for maintaining clear pay plans should not be overlooked, but state policy must be clear on the minimum standards for agency pay plans to justify pay changes. This would not affect an agency's ability to determine which pay changes it can include in its pay plan, or when to award pay changes to employees. State policy clarification would provide clear guidance on how to properly support those pay changes.

### **DOA Does Not Provide Active Oversight for Agency Pay Changes**

Interviews across state agencies made it clear there is confusion regarding the pay change process. In order for agency staff to properly support pay changes they need to have a good understanding of state policy. Because of the decentralized nature of the pay change process in Montana, there is a reliance on agency personnel to have a thorough understanding of how to properly support pay changes. In many cases it was clear that agency pay plans and state policy were not commonly consulted during the pay change process. For example, DPHHS regional offices conduct their pay change process internally at those offices without any review by the agency's central human resources staff. This can lead to individuals with little understanding of the pay change process being responsible for proper support of the pay change. In one example, agency staff indicated that an individual approving pay adjustments was from the private sector and did not fully understand the pay change process. This was a case of an untrained individual being responsible for the pay change process without any oversight from DOA, or agency staff who were more familiar with the pay change process. It is agency responsibility to be familiar with the agency pay policy and to have a system in place for proper review of pay changes by qualified staff.

### **Survey of Agency Personnel Indicates Need for Pay Change Training**

As part of audit work we sent out a survey to 199 agency HR staff at 24 agencies who work with agency pay plans, or pay change administration. We received 98 responses to the survey for a response rate of 49 percent. The survey asked questions regarding agency pay plans and pay change administration. This helped us gain broader insight into the understanding of pay changes at the agency level, beyond the ten agencies in the file review sample. The survey results made it apparent there is not a clear understanding of the different pay change types. As part of the survey, agency staff were asked to identify a competency adjustment, entry to pay band adjustment, results adjustment, and strategic adjustment based on the current definitions in state policy.

Figure 3 shows the total percentage of correct and incorrect responses from those four questions combined. One-third of agency staff responding to this section of the survey could not correctly identify the pay change types based on their definitions currently found in state policy.

### **The Decentralized Nature of the Pay Plan Makes DOA Guidance Crucial**

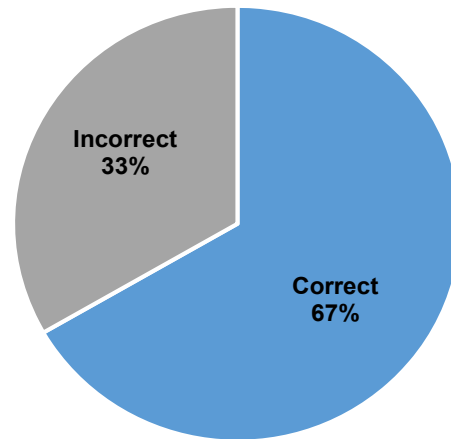
As part of our audit work, we reviewed the application and support of pay changes in other states, including Wyoming, Idaho, Utah, and South Dakota. We noted that other states generally have a centralized HR approval process for pay changes that acts as a check to determine pay changes are properly justified. For example, in Idaho a centralized executive branch policy indicates when a pay change may be given, and all pay plans and pay change rules are approved centrally.

In contrast, the final determination is made at the agency level in Montana. This makes clear policy even more important than it would be in the other states systems with a centralized decision making process for pay changes. State policy indicates that agency pay policy must identify procedures for implementing all aspects of pay addressed in state policy. DOA must provide agencies with pay plan policy that is clear enough for them to understand how to satisfy this requirement. This is part of DOA's statutory requirement in §2-18-102 to encourage and exercise leadership in the development of effective personnel administration within the several agencies in the state.

### **Clear State Policy and Training Will Improve Pay Change Consistency**

Audit work highlighted the need for training, and clarification of policy with regards to the pay change process. Current policy is leading to confusion within state agencies, and this confusion is leading to inconsistency in the pay change process. Montana's decentralized pay change system creates a need for a level of expertise in each agency regarding how to properly implement and support pay changes. In order to provide assurance that pay changes are being handled properly there must be more specific state policy criteria, and training provided by DOA to state agencies on how best to implement this criteria.

Figure 3  
**Pay Change Types Incorrectly Identified Based on the State Policy Definitions**



Source: Compiled by the Legislative Audit Division from survey data.

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**RECOMMENDATION #1**

*We recommend the Department of Administration take an active role in the pay change process by:*

- A. *Developing and implementing additional policy to determine what pay change types are available to agencies.*
  - B. *Establishing minimum levels of documentation for support and justification of pay changes.*
  - C. *Developing and providing training to agency staff on proper pay change procedure, including how to properly support and implement pay changes based on updated state pay change policy.*
- 

## **SABHRS Action Reason Codes Are Creating Data Entry Inconsistency**

As part of documenting any pay change, individual agency staff are required to enter each pay change into SABHRS to record what type of pay change was given, the amount of the pay change, and other information related to the individual receiving the pay change. This creates the official record of pay changes statewide. Agency staff are relied upon to determine the appropriate pay change type for the situation based on limited guidance provided by DOA that is infrequently referenced by agency staff. This leads to issues at the agency level regarding consistent entry of pay change information into SABHRS.

### **Guidance from DOA Is Unclear**

State policy includes a list of all of the available pay change types that agency staff choose from to enter a pay change into SABHRS. There are currently 26 different codes they can choose from. Table 2 (see page 16) shows each of the codes that agency staff have to choose from when entering a pay change into SABHRS.

Table 2  
**SABHRS Pay Change Codes**

Action	Reason	Description
PAY	BCR	Blue Collar Pay Raise
PAY	STA	HB 13 Statutory Pay Raise
PAY	CAR	Career Ladder
PAY	COM	Competency Adjustment
PAY	COR	Correct Inaccurate Pay
PAY	EMG	Emergency Firefighters-DNRC
PAY	EXM	Exempt Employee Raise
PAY	JUD	Judicial Branch Pay Change
PAY	MHP	MHP-HB 35 & Progression Raise
PAY	MAR	Market Adjustment
PAY	MER	Merit-Legislative Branch
PAY	MRT	Merit-State Fund
PAY	MIL	Military Pay Change
PAY	MEB	Move to Entry of Pay Band
PAY	NPS	Negotiated Pay Schedule
PAY	NRS	Per Diem Nurse Pay
PAY	NRE	Per Diem Nurse Pay End
PAY	PRP	Performance Adjustment
PAY	PRE	Performance Pay End
PAY	REC	Reclassification
PAY	SIT	Situational Adjustment
PAY	SIE	Situational Pay End
PAY	STR	Strategic Adjustment
PAY	SUP	Supervisory Adjustment
PAY	SUE	Supervisory Pay End
PAY	TAP	Training Assignment Progression

**Source: Compiled by the Legislative Audit Division from state policy.**

As mentioned earlier, there is a level of confusion with agency staff when it comes to differentiating between the different types of pay changes. This was apparent in the file review where audit work found 16 pay changes that were labeled incorrectly. During file review, if a pay change was mislabeled it meant that the supporting documentation could be based on the criteria for the incorrect type of pay change. This can lead to improper support of pay changes at the agency level. At a statewide level this generates concerns regarding the validity of pay change information in SABHRS. It was clear during interviews and survey responses that the number of pay changes available to agency staff during SABHRS entry is causing some of the confusion related to



data entry. In some cases state policy would refer to different state policy for further clarification on when to use a certain type of pay change. However, in many cases no further clarification was offered. There are also types of pay changes available in state policy that are not available in SABHRS. For example state policy offers results adjustments as a pay change option, but this is not an option in SABHRS. In other cases agencies would have types of pay change options in their pay plan that were not available in SABHRS. In these cases agency staff have to guess which pay change options in SABHRS best fits the situation. This leads to inconsistency and inaccuracies in entering pay changes.

### **The Department Needs to the Simplify Data Entry Options to Improve Consistency**

Agency HR personnel should have clear choices in SABHRS to choose from. This means having a list of pay changes in SABHRS that does not include options so similar it is difficult to determine which type is appropriate. As part of our work, we noted other states have a more centralized process for determining what pay change type is appropriate, and if it meets central criteria for that type of pay change. The states we spoke with have centralized staff enter the pay changes, creating consistency without more specific criteria. For example, in South Dakota agencies fill out pay increase request forms, which are reviewed and entered by the State Bureau of Human Resources. One office entering all pay changes creates greater consistency in the system. In Montana, the decentralized system requires a succinct list of pay change options for agencies to choose from in SABHRS. The options in SABHRS should be unique from each other, making it easy for agency staff to determine which option is appropriate for the pay change situation they are dealing with. This will help improve consistency in how state agencies record pay changes in SABHRS as well as the accuracy of SABHRS statewide data on pay changes.

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#### **RECOMMENDATION #2**

*We recommend the Department of Administration condense and simplify pay change options available in the Statewide Accounting, Budgeting, and Human Resources System.*

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## Chapter III – Pay Change and Pay Plan Review and Oversight

### **Introduction**

Pay plans are currently created by agencies based on standards set in state policy, statute, and the broadband pay plan. These agency pay plans outline what pay change types are available to the agency, and how to properly support them. Biennially, agencies are required by statute to file their pay plans with the Department of Administration (DOA). DOA houses the documents from each agency as they are provided. As part of our audit work, we noted that DOA conducts a limited review of agency pay plans and notifies agencies if their pay plans do not cover pay change types they wish to use. This does not determine if their pay plans will lead to proper support of pay changes. Our work also identified that DOA does not periodically review state agency pay changes to ensure that they meet the requirements set in state law, policy, or agency policy. Pay changes are carried out internally by agencies based on pay plans that are created internally by agencies. This has led to inconsistency in the pay change support required by agency pay plans, and the support that is documented for those individual pay changes. In some cases it was unclear if agency staff were referencing their agency's pay plan during the pay change process. This chapter outlines the need for DOA to implement review processes for pay plans and pay changes in order to correct agency mistakes in the pay change process, and fulfill its statutory requirement to exercise leadership in personnel administration.

### **Individual Agency Pay Plans Are Inconsistently Implemented**

The file review we conducted as part of audit work showed requirements to support pay changes in agency pay plans were not always met. In some cases human resource staff were not sure how some requirements of their pay plans could be documented. This indicates that agency pay change policy is not actively reviewed, nor being consistently referenced during the pay change process. This leads to inconsistent support for pay changes that do not meet the internal standards set by the agencies themselves. There is also inconsistency between agencies that comes from a lack of review process for their pay plans. Subject matter experts on pay change policy at DOA do not currently have a role in the creation of agency pay plan policy that forms the criteria for pay changes. This results in agency human resource staff taking sole responsibility for pay plan policy, even though in many situations they were not familiar with state level requirements for pay plans. DOA has provided agency staff with a guide to implementing pay plan rules, but it does not provide information on how to properly support pay changes.

During review of agency pay plans we found cases where parts of the plans were contrary, or not complete enough to meet state policy. For example, the Department of Transportation's (MDT) pay plan did not address a state policy requirement stating an individual receiving a temporary promotion had to be given notice describing why the promotion was given and its duration. As mentioned earlier, some agencies were also using types of pay changes that were not part of their pay plans.

### **Agency Pay Plans Do Not Align With Agency Pay Change Practices**

In the survey conducted by audit staff of agency employees responsible for the pay change process across the state, over 20 percent of respondents indicated they had fewer pay change types in their agencies pay plan than actually used. This means these agencies are using pay change types without agency standards indicating when they should be used, or how they should be properly supported. In other cases, there were parts of agency pay plans the agency staff did not know existed. For example, the Arts Council has an employee incentive program as a type of pay change in its pay plan that agency staff were not aware of. According to the survey, over 30 percent of respondents indicated their agency pay plan had a greater number of pay change types than they use. In this case the agencies have parts of their pay plans that are not contributing to the agencies' mission because of lack of use. This also adds confusion to agency pay plans. It furthers what audit staff heard during interviews with agency human resource personnel that these are not living documents that are frequently referred to during the pay change process.

### **State Agencies Do Not Measure the Success of Individual Pay Plans**

The Broadband Pay Plan Guide requires each agency to have a system in place for measuring and recording the success of its pay plan in achieving agency goals. Audit work did not find any agency that had a system set up for this measurement. This means that agencies are not making informed decisions regarding which parts of their pay plans are effective, and which need to be changed. In most cases agency staff were unaware of what measuring their pay plan would look like, or how to begin measuring the activities of their pay plan. The Broadband Pay Plan Guide does not go into detail about what measures should be in place to properly determine if a pay plan was successful. A common idea from agency staff was to look at staff turnover. However, there can be many factors that determine turnover. If a meaningful measurement of pay plan success is going to be implemented by agencies, DOA needs to determine what that would include. DOA would also need to provide guidance to agencies on its implementation as part of a review process. Measurement of agency pay plans provides information on their effectiveness to the agencies themselves, as well as to the

legislature. This helps in the assessment of the effectiveness of the broadband pay plan as a whole, and the effectiveness of the pay change tools.

## **Other States Have a Stronger Review of Pay Plan Policy**

Most states reviewed during audit work had a central pay plan, or a review and approval process for agency pay plans. This allowed them to verify that pay plans led to a consistent pay change process by ensuring that a base level of support was required for pay changes in each pay plan. For example, Idaho centrally approves all agency pay plans and sets up rules and criteria for all types of allowable pay changes. Wyoming, on the other hand, simply has a state compensation policy that outlines the types of pay changes agencies are allowed to use. Since each agency in Montana has its own pay plan, there needs to be a centralized review process to determine if pay plans meet state policy requirements. This will help to proactively change pay plans to conform with state policy. This review, combined with a clearer state policy regarding pay changes, will lead to more consistency across the state. This will allow DOA to discuss with agencies which pay change types will work best for each agency, and how to properly support those pay changes. This will also help establish a process at each agency to fulfill the state policy requirement of having a system in place to measure the success of its pay plan.

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### ***RECOMMENDATION #3***

*We recommend that the Department of Administration:*

- A. *Establish and implement a review process for agency pay plans based on state policy to determine if pay plans meet minimum requirements for pay change support, and*
  - B. *Assist agencies in establishing measurements for the success of their pay plans.*
- 

## **DOA Does Not Review State Agency Pay Changes**

Pay changes are handled internally by agency staff. Aside from establishing statewide policy, DOA does not have a role in reviewing agency pay changes to ensure they are being implemented appropriately. It is up to each agency to determine if pay changes have been properly supported before awarding the pay change to an employee. We found that over 86 percent of the sample of pay changes reviewed were not supported. This included pay changes that had no documentation as to why the pay changes were given. For example, the State Auditor's Office gave a strategic adjustment without any documentation supporting why the pay change was given. There was only an email

from the supervisor stating the pay change was awarded. In this case the review by the agency did not determine that this pay change was improperly justified. There is no centralized review process to catch these types of scenarios, and prevent them from happening in the future.

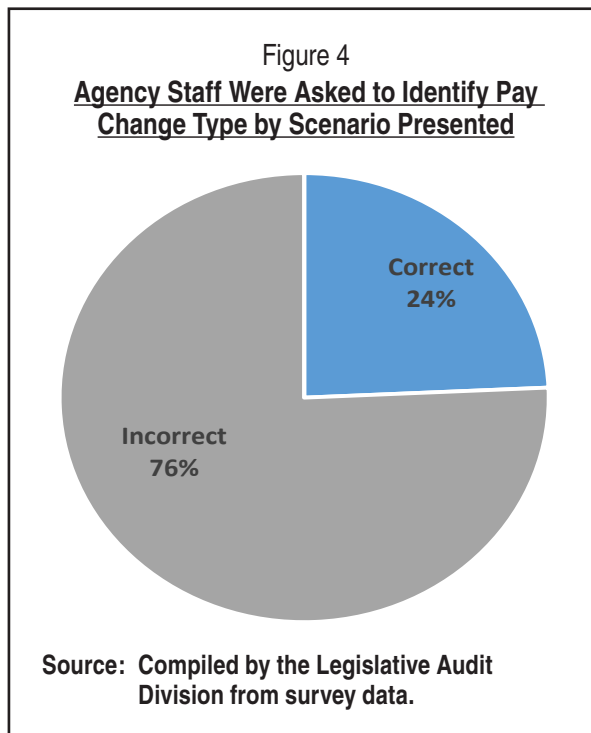
During audit work we found that agency staff were not always clear on which pay changes should be used for certain situations. For example the Department of Fish, Wildlife and Parks (FWP) awarded a performance adjustment for an employee who had taken on supervisory responsibilities. This should have been a supervisory adjustment, but this mistake was not identified before it was entered by agency human resources staff. Without a centralized review process for pay changes, staff at the agency level are responsible for determining the appropriate type of pay change for the scenario. In order to determine agency staff's understanding of the pay change types, audit work included a survey of agency staff responsible for the pay change process at the agency.

One set of survey questions asked agency staff to identify the correct pay change type that should be used based on a presented situation. Audit staff presented two scenarios in the survey. One scenario that would lead to a competency adjustment, and one that would lead to a situational adjustment. The combined results of these questions are presented in Figure 4.

As illustrated by the figure, there is significant confusion among agency staff regarding which pay change type should be used in which situation. Agency staff were only able to identify the correct pay change

type 24 percent of the time. Again, agency staff are the final check on pay changes, with no review process to determine if they are making the correct pay change type decisions. Using the wrong pay change type for the scenario will lead to improper documentation that does not correctly support why the pay change was given.

In addition to state agencies incorrectly selecting pay change types, we found that FWP and MDT were giving across-the-board market adjustments to employees. This is not prohibited under the broadband pay plan, but the procedure to carry these out



was not documented in the agencies' pay plans. For these two agencies in our sample, across-the-board market adjustments cost their agencies a total of \$2.67 million for fiscal year 2015. These were pay changes that were given with a goal of getting everyone within the agency to a certain percentage of the market midpoint based on their position. This results in everyone in a position making the same base salary. While this is allowed under the broadband pay plan, it is a transition back to a pay scale system similar to what was in place prior to implementing the broadband pay plan. The broadband pay plan is designed to allow each agency to have a system in place to provide pay changes according to performance and other factors. This will naturally lead to differences in pay amongst individuals in the same position. In addition to the lack of clear guidance provided by DOA to state agencies regarding pay changes, the lack of a centralized review process has made the pay change process inconsistent. This has contributed to agencies turning to across-the-board adjustments that result in complete equity of pay in the various positions of the agency. While across-the-board market adjustments are not prohibited under the broadband pay plan, they take away the flexibility of the agencies to more actively manage employee through the pay change options in their pay plans. The broadband pay plan focuses on individuals receiving pay changes based on the agency's pay plan, which will lead to differences in pay between employees in the same position.

### **Pay Changes Have a Significant Cost to the State**

As part of our audit work, we identified 173 out of our sample of 200 (86.5 percent) pay changes that were not properly supported by agencies. This led to a cost to the state of over \$394,000 in fiscal year 2015. This generates questions about the \$9.5 million in pay changes awarded in fiscal year 2015. Based on the information available, the pay changes in our sample did not meet the criteria established in agency pay plans, state policy, and collective bargaining agreements. Pay changes represent a large, ongoing expenditure for the state. They are awarded based on a process that is carried out internally in the agencies without oversight. A review of pay changes would help to provide some oversight of this cost to the state. This would help to ensure that agencies offer proper support for these ongoing personal service expenditures. This allows DOA to fulfill its role in statute to encourage and exercise leadership in the development of effective personnel administration.

### **Other States Provide Centralized Review of Agency Pay Changes**

In other states reviewed, pay changes are entered into their payroll systems centrally. This allows for a second layer of approval by centralized HR staff who are experts on pay changes, and what support is needed to properly justify them. In this case there is a review by a third party who looks for the justification required, and is not

influenced by the person awarding or receiving the pay change. In South Dakota a proposed pay change is sent to the Bureau of Human Resources. Based on the information submitted by the agency, the Bureau of Human Resources determines if it meets the state criteria for the type of pay change that was submitted. In the Montana broadband system this decision making process happens within individual state agencies. In lieu of a centralized decision making process, a review process for pay changes by DOA would help to improve consistency in pay change documentation. DOA could review a sample of pay changes to determine if they met requirements in agency pay plans, state policy, and union collective bargaining agreement policy for proper support. DOA would not be making decisions on whether the pay change was warranted. It would ensure agency pay change decisions were supported. For example, if a performance adjustment was awarded by the agency, DOA would not be making judgments regarding whether the employee performance was good enough to warrant the adjustment. DOA would be looking to determine if the performance assessment and any other required support was provided.

### **DOA Provides A Review Process for Agency Reclassifications**

Audit work noted that DOA conducts a review process for reclassifications. The agency annually takes a sample of reclassifications, either randomly or according to judgement if one looks suspicious, and review the documentation to determine if it is supported. The review of pay changes could be conducted in a similar way. This would help create consistency in the support of pay changes across state agencies. DOA could then explain to agency staff how their pay change support deviated from requirements in policy. This would help improve pay change processes at the agency by identifying and addressing practices that lead to improper support. Since these pay changes are being conducted outside of legislative control, this would provide a level of central oversight that does not currently exist while not impacting an individual agency's ability to provide pay changes as part of the state's broadband play plan. This would help to properly justify difference in pay, and ensure that broadband pay change options are being used according to the applicable policy. This would also improve accountability for the public funds used for these various pay changes.

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#### **RECOMMENDATION #4**

*We recommend the Department of Administration take a more active role in the pay change process, including developing and implementing an annual review process of pay changes to determine if they are properly supported based on agency policy, updated state policy, and union collective bargaining agreements.*

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## Chapter IV – Statewide Pay Adjustment Analysis and Funding

### **Introduction**

As part of the second objective, audit staff examined the distribution of pay adjustments across state agencies for fiscal year 2015. This review looked only at those pay change types that are described in state policy as pay adjustments. This focused the analysis on those types of pay changes that are completely at the discretion of the agency, which are defined as pay adjustments. Pay change types outside of pay adjustments such as promotions and reclassification are decided based on a hiring processes or job description, meaning that they are not completely at the discretion of the agency. This also excluded across-the-board pay adjustments given by the legislature. We evaluated the differences between state agencies regarding the distribution of pay adjustments among agency staff. We also looked for any factors that may impact a state agency's ability to provide pay adjustments such as overall agency funding sources, personal service funding sources, and types of positions receiving adjustments. Interview with agency staff indicated there were factors that influence the ability of an agency to provide pay adjustments, such as the main source of funding received by an agency. However, we determined there are no clear answers as to why some agencies are able to provide more adjustments than others.

Based on our review of pay changes presented in prior chapters, state agency staff currently apply and document pay changes inconsistently. This chapter discusses our analysis of the distribution of pay adjustments and what factors influence an agency's ability to provide pay adjustments. The across-the-board pay adjustments given by the legislature are one of the factors that can leave agencies without the discretionary funding necessary to carry out the broadband pay plan.

### **Statewide Pay Adjustment Data May Not Always Be Reliable**

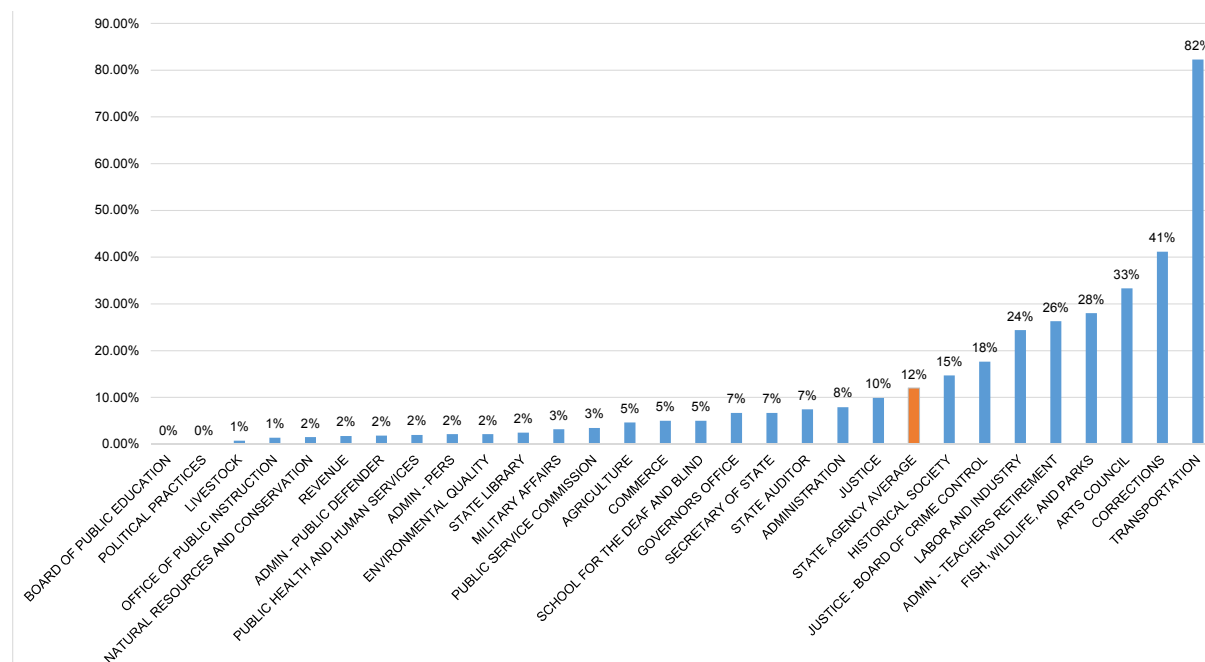
Audit work included a review of all pay adjustments across state agencies for fiscal year 2015. In order to conduct this analysis, we obtained statewide pay adjustment data from the Department of Administration (DOA) housed within State Accounting, Budgeting, and Human Resources System (SABHRS). SABHRS is the state's human resource and accounting system, which serves as a record of all state employee pay adjustments. Audit staff identified the number of employees under the broadband pay plan using this information. Audit staff then identified only those employees who received a pay adjustment as defined in state policy. This formed the base data that was analyzed to determine pay adjustment distribution statewide. Once this information was established, audit staff looked at the distribution based on various factors that can

impact the ability of a state agency to give employees pay adjustments. Audit work tried to identify any correlation between the pay adjustment data, and the different factors that could be broken down with the available data. This included looking at the adjustments by agency, job family, pay band, cost, and funding sources. Audit work also reviewed the costs of pay adjustments to the state. During audit work it became clear that there are issues with the SABHRS data that was used for the review of the distribution of pay adjustments. This comes from problems associated with the entry of pay adjustment data into SABHRS, as well as the inconsistent manner in which state agencies apply pay adjustments. With these issues in mind, the following represents the analysis of the fiscal year 2015 pay adjustment data.

### **Percentage of Employees Receiving Adjustments Varied Widely Between Agencies**

The base analysis performed for this objective was determining which agencies were distributing the most pay adjustments. In order to compare across agencies while considering the number of employees in each agency, we looked at the percentage of employees receiving pay adjustments. Through this analysis it was clear that a handful of agencies have a significantly higher percentage of employees receiving adjustments. These agencies included Montana Department of Transportation (MDT), Department of Corrections (DOC), Department of Fish, Wildlife, and Parks (FWP), and Department of Labor and Industry (DLI). MDT was the highest with over 80 percent of its employees receiving pay adjustments. Twenty-one percent of all state employees under the broadband pay plan received adjustments in fiscal year 2015. Figure 5 (see page 27) shows the percentage of employees receiving pay adjustments for each of the agencies with employees on the broad band pay plan.

Figure 5  
**Percentage of Employees Receiving Discretionary Pay Adjustments**  
 Fiscal Year 2015



Source: Compiled by the Legislative Audit Division from SABHRS data.

As illustrated by this figure, there are stark differences in the percentage of employees receiving adjustments at the various agencies, with the state agency average at 12 percent of employees receiving adjustments. The contrast between the agencies contributes to perceptions of inequity agency staff have regarding their ability to receive pay adjustments based on which agency they work for.

### **Agency Pay Plan Policy and Types of Adjustments Affect Percentage of Employees Receiving Adjustments**

Agencies are free to choose which pay adjustment types they want to include in their pay plans. How they use the pay adjustment types they include in their pay plan differs between agencies. For some agencies, a higher percentage of employees receiving adjustments was the result of across-the-board pay changes that were given in order to bring everyone in the agency up to a certain salary based on the position. To do this, an agency creates a formula to get every employee to a certain percentage of an established market midpoint. The market midpoint is determined by annual salary analysis that DOA does, based on pay information from surrounding states. For some agencies, these adjustments were done without specific funding from the legislature. For example, MDT used carry forward funding and transferred money

from other budget categories to personal services to pay for these adjustments. In the case of MDT, these increased costs will be reflected as increased personal services costs in the agency's request to the 2017 Legislature. In some cases the legislature allocated funding to specific agencies for certain adjustments. For example, the Department of Justice and DOC received funding for specific adjustments. MDT, FWP, and DLI did not receive any specific adjustment funding. Other agency pay policies have systems in place for frequent pay adjustments based on performance or a career ladder. This will naturally lead to more pay adjustments for employees as they are carried out. DLI had a probationary period ending adjustment that was given when an employee made it through the probationary period. On the other side, agencies like the Department of Public Health and Human Services (DPHHS), Department of Revenue, and Department of Natural Resources and Conservation all have under 5 percent of their employees receiving adjustments.

### **State Employees Perceive Inequity in Agencies' Ability to Give Pay Adjustments**

According to the survey of agency employees who are involved in the pay adjustment process, over 60 percent either agreed or strongly agreed that there is inequity in agencies' ability to offer pay adjustments. As part of our evaluation of statewide adjustment data, we discussed with agency staff the factors impacting the ability of state agencies to provide pay adjustments. For example, state agency staff frequently indicated that much of the ability of an agency to provide adjustments hinged on an agency's main funding source. Agency staff frequently perceived that agencies funded primarily with federal resources as "rich agencies," providing them an increased ability to award pay adjustments. Conversely, state agency staff characterized agencies funded primarily with general fund appropriations as "poor agencies," with a limited ability to provide pay adjustments to employees. Regardless of the factors that lead to the wide variance in the percentage of employee receiving adjustments at an agency, this has led to the appearance of inequity between agencies. Agency employees questioned whether these perceived inequities should exist between agencies since they are all employed by the State of Montana.

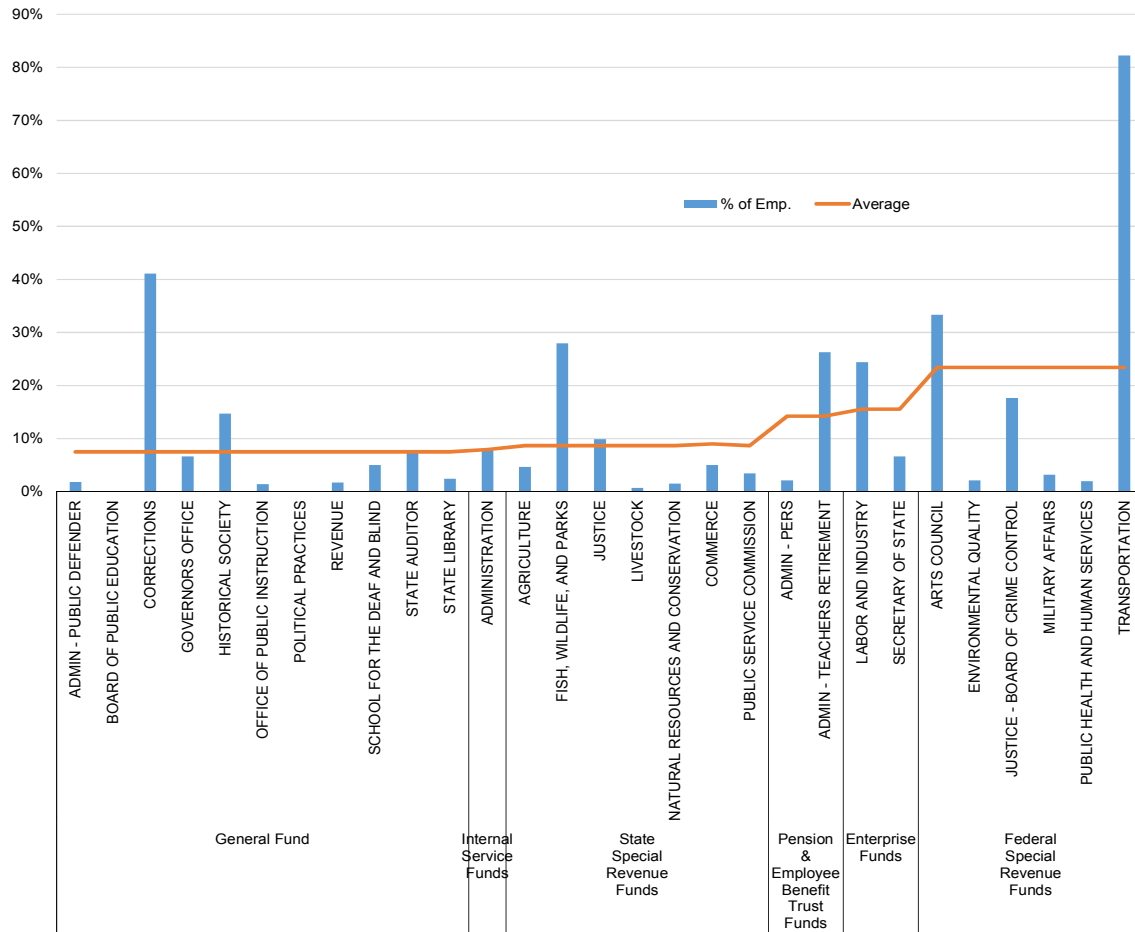
### **Funding Source Does Not Clearly Indicate an Agency's Ability to Give Pay Adjustments**

Agency staff frequently referred to funding source as a major factor in an agency being able to award pay adjustments to its employees. In order to determine if this correlation existed, a primary funding source for each agency as a whole, and the primary funding source for each agency's personal services were established. Primary funding source is defined as the largest funding source. We identified the primary funding source for

each agency, and then attributed the percentage of employees receiving adjustments from those agencies to the appropriate funding source.

The funding source with the highest percentage of employees receiving adjustments varied when looking at the primary funding source for the agency in general, versus the primary funding source for each agency's personal services. If funding source controlled an agency's ability to give pay changes, then all of the agencies with a certain primary funding source would have a high percentage of employees receiving adjustments, while agencies with other types of primary funding sources would have a lower percentage of employees receiving adjustments. However, audit work determined there were a variety of agencies with varying percentages of employees receiving adjustment for each funding source. For example, MDT and DPHHS both had a primary funding source of federal special revenue for the agency in general, but MDT had over 80 percent of its employees receiving pay adjustments, while DPHHS had only two percent of its employee receiving adjustments. Figure 6 (see page 30) shows that under each primary general funding source there are agencies with varying percentages of employees receiving adjustments. As illustrated by the figure, there is not a clear relationship between an agency's primary funding source and its ability to provide pay adjustments. This figure illustrates the percentage of employees receiving an adjustment in each agency, with the primary funding source for that agency listed at the bottom. The figure also has a line illustrating the average percentage of employees receiving adjustments for each of the primary agency funding sources.

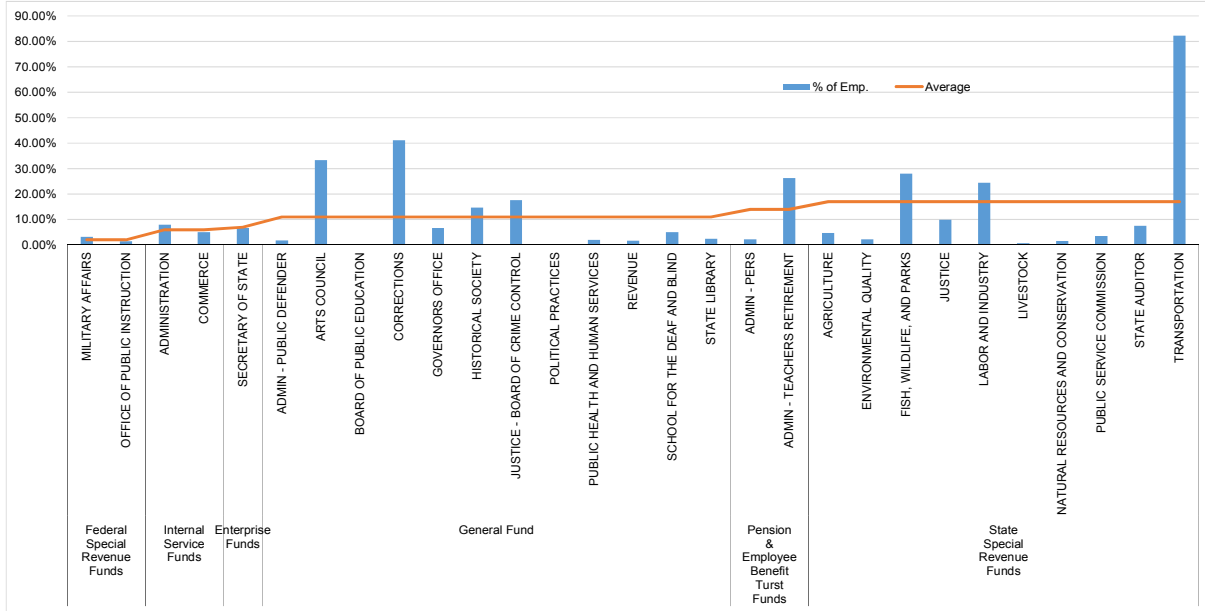
Figure 6  
**Percentage of Employees Receiving Adjustment in Each Agency With Primary Agency Funding Type**  
 Fiscal Year 2015



Source: Compiled by the Legislative Audit division from SABHRS data.

In looking at primary personal services funding source there were similar examples. The personal services funding source with the highest percentage of employees receiving adjustments was state special revenue. However, this category included agencies with varying percentages of employees receiving adjustments. This highlights that a certain primary personal services funding source also does not correlate with an ability to give adjustments. Figure 7 (see page 31) shows that primary personal services funding source also had little effect on an agencies' ability to give pay adjustments. This figure also illustrates the percentage of employees receiving an adjustment in each agency, with the primary funding source for each agencies personal services listed at the bottom. The figure also has a line illustrating the average percentage of employees receiving adjustments for each of the primary personal service funding sources.

**Figure 7**  
**Percentage of Employees Receiving Adjustments by Agency With Primary Personal Service Funding Type**  
**Fiscal Year 2015**



Source: Compiled by the Legislative Audit Division from SABHRS data.

As illustrated in the figures, the average percentage of employees receiving pay adjustments varied by funding source for both agency funding in general and personal services funding. We found that the funding source with the highest percentage of employees receiving adjustments was determined by which funding source MDT fell under. MDT had over 80 percent of its employees receiving adjustments. This raised the average percentage of adjustments for the funding type they fell under. MDT’s primary funding source was federal special revenue for the agency as a whole and state special revenue for personal services. As seen in the figures, these were the funding sources with the highest average percentage of employees receiving adjustments because of MDT’s high figure of 80 percent of employees receiving adjustments. Based on our analysis, funding source does not determine an agency’s likelihood of giving a certain percentage of its employees pay adjustments.

**Distribution of Pay Adjustments Across Employee Subsets Varied Widely**

Positions in state government are broken into various subgroups within SABHRS. Audit work used these subgroups to determine if there was inequity between the percentages of employees within these groups that are receiving adjustments. This

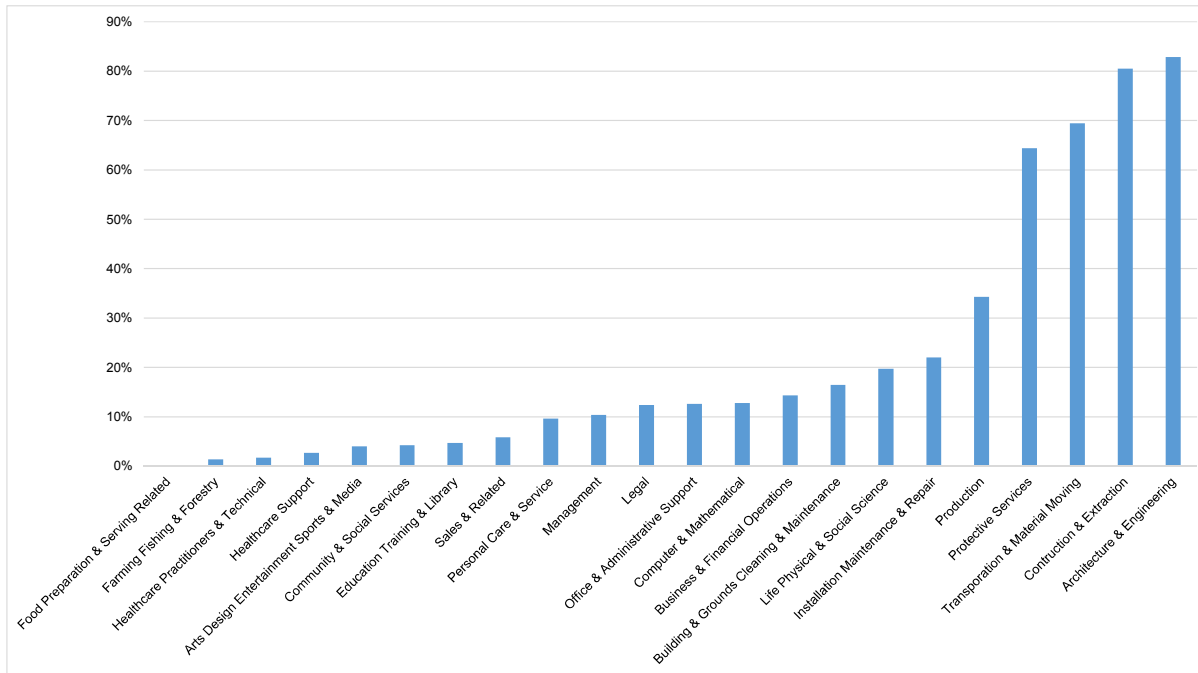
does not point to the cause of the distribution of pay adjustments, but provides more information on their distribution. This information will show how they are distributed by job family and pay band. Job families are groups of similar positions based on the general types of tasks those positions perform. Pay bands refer to the nine pay bands that make up the broadband pay plan. These run from lower paying positions at band one to the highest paid positions in band nine. The following sections discuss the distribution of pay adjustments based on these groups.

### **Employees Receiving Adjustments Varied by Job Family**

Positions in state government are grouped into job families based on standards from the federal government. This is a classification system to group similar positions by the types of activities performed by those positions. For example, the life physical and social sciences job family includes FWP wildlife biologists, foresters, and other similar positions. Looking at pay adjustment information by job family offers a look into which types of positions were receiving a greater percentage of pay adjustments. We found fields such as construction and extraction and architecture and engineering included a higher percentage of employees that received a pay adjustment. This was not surprising because these are all job fields with positions associated with MDT, which had 80 percent of its employees receiving an adjustment. Protective services, which is related to law enforcement, is another job field that also had a high percentage of employees receiving adjustments. This included positions such as game wardens. This job field had many positions at FWP and DOC, which were agencies with high levels of employees receiving adjustments. Figure 8 (see page 33) shows the percentages of employees receiving adjustments for each job family.



**Figure 8**  
**Percentage of Employees Receiving Pay Adjustments by Job Family**  
 Fiscal Year 2015



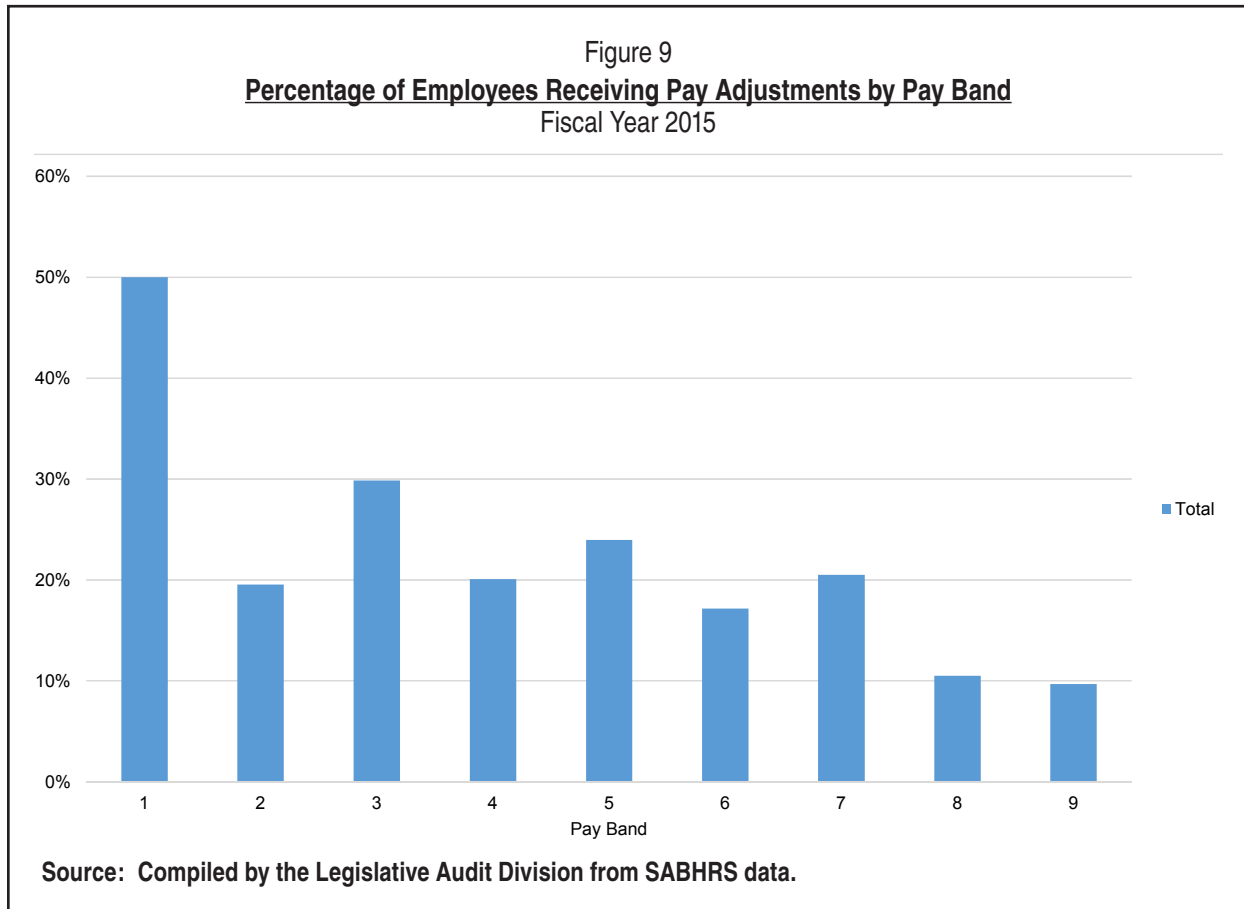
Source: Compiled by the Legislative Audit Division from SABHRS data.

Based on state policy, there is no basis to suggest that the distribution represented by this figure is improper. There is a tendency for technical and highly skilled job families to have a higher percentage of employees receiving adjustments. However, these job families are predominantly made up of positions from agencies such as MDT that have a high percentage of employees receiving adjustments. The graph does show there are wide gaps between the different job families. This contributes to the perception of inequity among agency staff regarding their opportunity to receive pay adjustments.

### **Percentage of Employees Receiving Adjustments Varied by Pay Band**

There are nine pay bands in the broadband system. All positions are assigned to one of the pay bands based on duties. Each pay band has a pay range, with the higher bands having higher pay ranges. Audit work included a review of the percentage of employees receiving adjustments for each pay band. Outside of pay band one (only had two employees with one receiving an adjustment) there were varying percentages across the pay bands. Pay bands two, four, and seven were almost identical at around 20 percent of employees receiving adjustments. Pay band three was the largest with 30 percent of employees receiving adjustments. Eight and nine were the lowest with

around 10 percent of employees receiving adjustments. Figure 9 illustrates how pay adjustments are distributed amongst each of the pay bands.

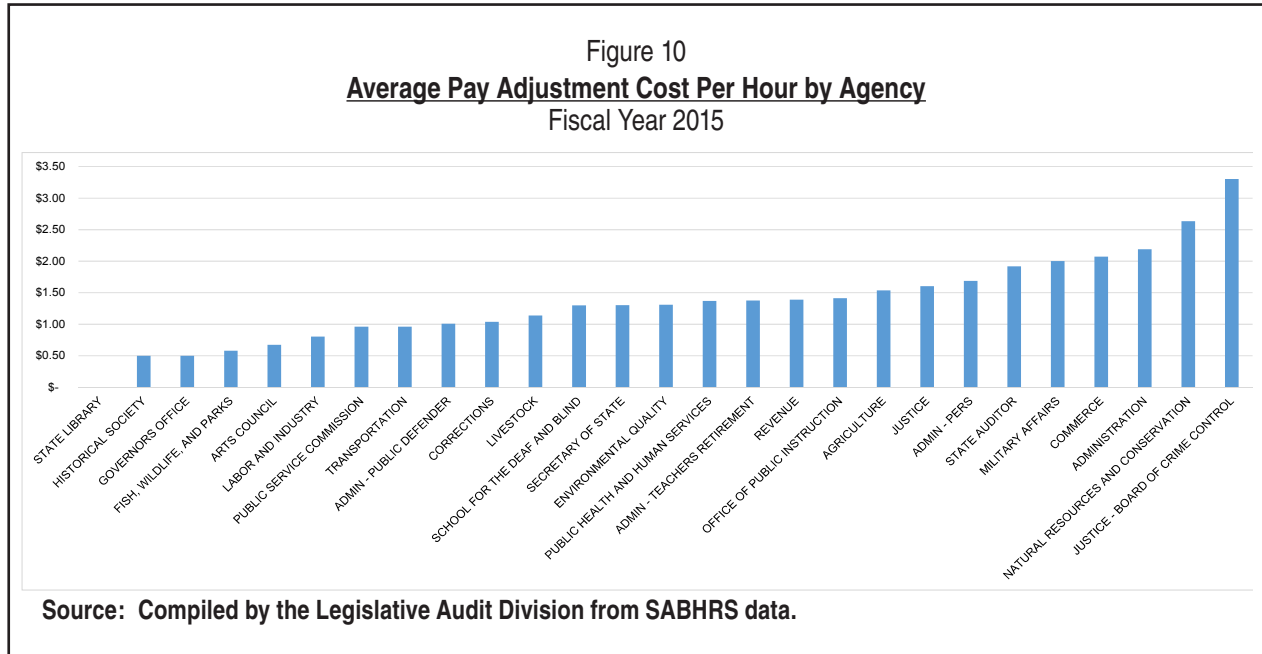


While there is no established criteria to indicate how pay adjustments should be disbursed between pay bands, this shows the percentage of employees receiving adjustments is similar between bands with the percentage of employees receiving adjustments generally trending lower for the higher the pay bands. This could come from the perception that pay in higher bands is higher, and does not need to be raised as frequently at the discretion of the agency.

### **Pay Adjustments Represent a Significant Cost for State Government**

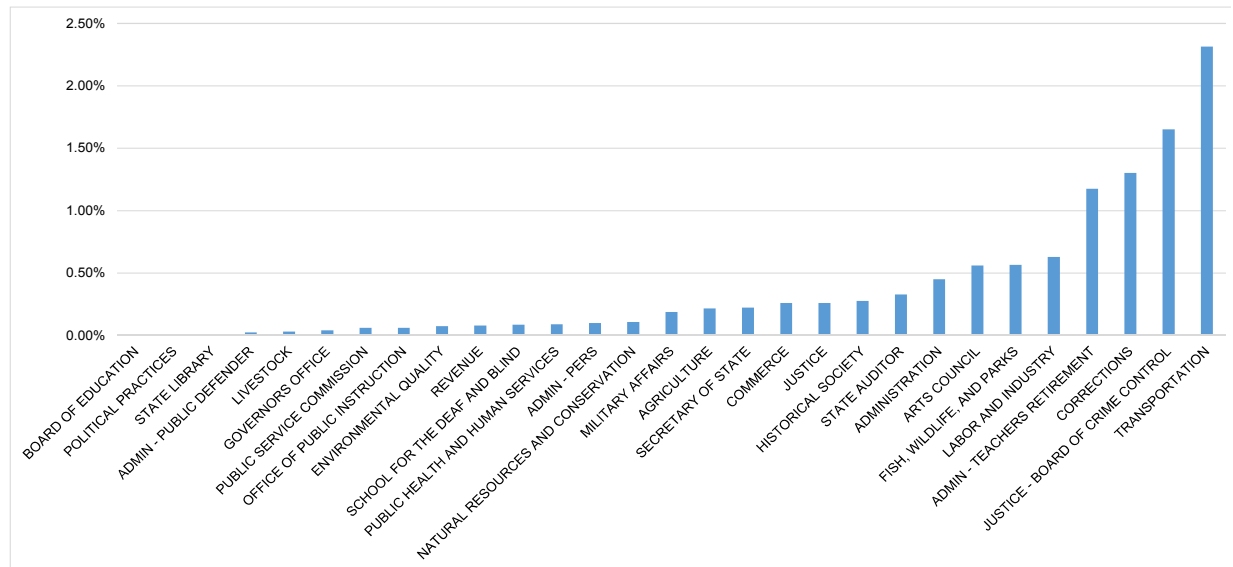
As part of our analysis of statewide pay adjustments, we examined the total costs of pay adjustments provided by state agencies in fiscal year 2015. MDT had the highest total cost for pay adjustments at over \$2.4 million for fiscal year 2015. The cost of individual pay adjustments ranged from \$0 to over \$7 per hour. When looking at the average cost of pay adjustments for an agency it ranges from the Governor's Office at \$.50 per hour to DOJ-Board of Crime Control at \$3.30 per hour. Those agencies that gave

across the board market adjustments have relatively low average cost of adjustment, at under \$1.00 per hour. The broadband pay plan is set up to allow agencies to award pay adjustments as they see necessary based on their pay plans. As part of the broadband pay plan there is no limit to the size or amount of pay adjustment that can be given. The following figure shows the average per hour pay adjustment cost falls within a range from \$0 to \$3.30 per hour. Our analysis also showed a general trend of agencies with more pay adjustments having a lower average cost per hour.



Audit work also compared the average cost of adjustment with the primary general funding source and the primary personal service funding source. Once again there does not seem to be a direct correlation between the funding source and the average cost of adjustments. This means that it is unclear if the funding source has any effect on how large of a pay adjustment an agency is able to give. Instead it appears to rely on available funds of the agency, and agency managements comfort level in expanding personal service expenditures. Figure 11 (see page 36) shows the yearly pay adjustment costs for each agency as a percentage of their total personal services funding. This offered an objective look across agencies, and determined how large of a personal service increase each agency was incurring with the pay adjustments they gave in fiscal year 2015.

Figure 11  
**Pay Adjustment Costs as Percentage of Personal Funding**  
 Fiscal Year 2015



Source: Compiled by the Legislative Audit Division from SABHRS data.

As indicated by the figure, there are some agencies that are increasing their personal service costs with pay adjustments more than others. This varies from some agencies that are at a fraction of a percentage, to MDT that has raised personal service costs by over 2 percent. This indicates varying willingness and ability of agencies to give pay adjustments that will impact personal service costs.

### **Pay Adjustment Analysis Provided to the Legislature Is Limited**

The analysis in this chapter provides detail regarding the distribution of discretionary pay adjustments across state employees covered by the broadband plan. This includes the extent to which individual agencies are able to use discretionary pay adjustments to actively manage their employees as was intended with the creation of the broadband pay plan. This type of analysis is not currently provided to the legislature on an ongoing basis. DOA management indicated that they have not been asked to provide this information to anyone in the past, so they have not conducted this type of analysis. However, the legislature has regularly shown interest in the use of discretionary pay adjustments. Discretionary pay adjustments are a key part of the broadband pay plan that should be analyzed periodically in order for the legislature to have a complete picture of their impact on the broadband pay plan.

## Pay Adjustment Analysis Would Provide Information on the Effects of the Pay Plan

Under current statute, DOA is required to investigate the operation and effect of the general provisions and the classification process of the broadband pay plan. However, state law does not currently require any investigation or reporting of employee compensation, including the use of discretionary pay adjustments. Pay adjustments affect agency operations and budgets, and are intended to support each agency's mission, goals, and objectives. Providing information to the legislature on how they are distributed is critical to the legislature understanding what effect discretionary pay adjustments are having, and what monetary impacts they will have on future budgets.

Without this information the legislature does not know the extent to which agencies are able to use existing funds to provide discretionary pay adjustments to their employees, outside of statutory pay adjustments. The legislature's requests for more information on this process indicates that there is interest regarding the use of discretionary pay adjustment by state agencies. There may also be some degree of confusion surrounding the validity or appropriateness of the tools agencies have available to them outside of statutory pay adjustments. As the above analysis shows, agencies have a varying ability or willingness to provide discretionary pay adjustments to their employees. The legislature should have this information when making decisions about the broadband pay plan.

Current law not requiring analysis for pay adjustments under the broadband pay plan has left the legislature without key information about effects of the broadband pay plan. This kind of analysis and information would be relevant as the legislature considers the effects of agency personal services budget requests, and the relationships between discretionary adjustments and statutory adjustments considered as part of the biennial state employee pay plan. DOA's understanding of the pay adjustment process leaves it uniquely suited to gather this statewide information. This will help to ensure that the broadband pay plan is achieving its intended results going forward.

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### **RECOMMENDATION #5**

*We recommend legislation be enacted requiring the Department of Administration to:*

- A. *Conduct a biennial investigation of the operation and effect of the application of discretionary pay adjustments under the broadband pay plan, and*
  - B. *Report results of this analysis prior to the commencement of each regular legislative session.*
-

## **Legislative Pay Adjustments Contradict the Broadband Pay Plan**

One of the main characteristics of a broadband pay plan is the greater latitude provided to agency management regarding the establishment of their pay plans. The majority of legislative funding for pay adjustments is currently given through across-the-board adjustments to all state employees, rather than through the broadband pay plan. This strategy typically gives equal pay adjustments to all state employees under the broadband pay plan, and takes away the discretion from agency management to distribute pay adjustments according to their agency pay plan.

Across-the-board adjustments are clearly permitted by statute. However, this leaves agencies to provide pay adjustments through other avenues, such as vacancy savings, or other means of funding. As the audit work in this chapter shows, funding pay adjustments in this way leaves agencies with a varying ability to use their pay plans. In many circumstances, it largely comes down to the availability of funds, and an agency's willingness to expand personal service costs going into the future. While discretionary pay adjustments are currently outlined in the broadband pay plan as a way for agencies to support their mission, goals, and objectives, they are primarily used to supplement the across-the-board statutory pay raises given by the legislature. Based on statute, it is unclear if this use of discretionary pay adjustments follows the legislature's intent when the broadband pay plan was implemented.

### **Pay Adjustments Funding Under the Broadband Pay Plan**

In 2001 the legislature passed legislation to implement a broadband pay plan. One of the main features of the broadband pay plan is to give agencies the ability to manage their workforce and provide pay adjustments to advance the missions of their agencies. This was a policy decision by the legislature to move to a system that allowed agency discretion to tailor their pay plans to advance their agencies' missions. However, the legislature has continued to primarily fund pay adjustments as across the board in statute since implementing the broadband pay plan. These two statutory decisions by the legislature run contrary to each other. This creates confusion and inconsistency at the agency level regarding the purpose of the pay adjustment tools under the broadband pay plan.

The variation between agencies in the percentage of employees receiving pay adjustments highlights their confusion regarding how pay adjustments should be initiated. This leaves only some agencies actively managing their employees as intended under the broadband pay plan. These differences between agencies have in turn created confusion for the legislature regarding how and why certain agencies are giving pay adjustments

beyond the statutory across-the-board pay adjustments. Under the current system only some agencies are able to fully use their pay plans to support their missions, goals, and objectives.

### **Statute is Unclear About the Use of Statutory and Discretionary Pay Adjustments**

The statute establishing the broadband pay plan speaks to across-the-board adjustments without specifically addressing the agencies' ability to use the discretionary pay adjustments in their pay plans. Statute does not prohibit discretionary pay adjustments under the broadband pay plan, across-the-board pay adjustments by the legislature, or a combination of both types of adjustments. However, the use of legislative adjustments within the context of the broadband pay plan has created confusion on multiple levels regarding the legislature's intentions for how the discretionary pay adjustment tools of the broadband pay plan should be used by agencies. Our work identified a need for the legislature to clarify the use of statutory and discretionary pay adjustments for state employees as part of the state's broadband pay plan. The legislature's role could involve consideration of changes in state law to define an appropriate balance between statutory and discretionary adjustments, or whether one approach to managing employee pay should be favored over another as a policy preference. This kind of clarification would provide predictability and transparency to a process which currently lacks both, and should help strengthen agencies' ability to meet their missions and the legislature's goal of designing credible and effective pay adjustment policies for state employees.

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#### **RECOMMENDATION #6**

*We recommend legislation be enacted to clarify state laws regarding the use of statutory and discretionary pay adjustments under the broadband pay plan.*

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DEPARTMENT OF  
ADMINISTRATION

DEPARTMENT RESPONSE





**MONTANA DEPARTMENT OF ADMINISTRATION**  
*"the backbone of state government"*

**Director's Office**

Steve Bullock, Governor • John Lewis, Director

January 27, 2017

Angus Maciver, Legislative Auditor  
 Legislative Audit Division  
 PO Box 201705  
 Helena, MT 59620

RECEIVED

JAN 27 2017

LEGISLATIVE AUDIT DIV.

Dear Mr. Maciver:

Thank you for the opportunity to respond to the audit of the Oversight of Discretionary Pay Changes for State Employees. We appreciate the professionalism of Jeremy Verhasselt and Alyssa Sorenson during the course of this complex and time-consuming audit.

Our comments to the audit recommendations follow:

*Recommendation #1 – We recommend the Department of Administration take an active role in the pay change process by:*

- A. Developing and implementing additional policy to determine what pay change types are available to agencies,*
- B. Establishing minimum levels of documentation for support and justification of pay changes,*
- C. Developing and providing training to agency staff on proper pay change procedure, including how to properly support and implement pay changes based on updated state pay change policy.*

**Department Response:** Concur

The department conditionally concurs with this recommendation. The department will develop additional guidance documents, review possible policy changes, establish additional minimum requirements, and provide training to agencies. The department proposes to complete and implement this work by December 31, 2017.

*Recommendation #2 – We recommend the Department of Administration condense and simplify pay change options available in the Statewide Accounting, Budgeting, and Human Resources system.*

**Department Response:** Concur

The department recognized the issues with pay change options in SABHRS prior to the commencement of this performance audit and is currently reviewing changes to pay codes, titles, and definitions for SABHRS. The department plans to implement these changes by July 1, 2017.

*Recommendation #3 – We recommend that the Department of Administration:*

- A. Establish and implement a review process for agency pay plans based on state policy to determine if pay plans meet minimum requirements for pay change support*
- B. Assist agencies in establishing measurements for the success of their pay plans*

**Department Response:** Concur

The department concurs. The department will update and expand its review process to include more robust pay change requirements within agency pay plans and will update its policy to include agency pay plan review and approval by the department. The department needs to wait until after the legislative session to change policy to ensure any statutory changes are incorporated. The department proposes this action can be completed by October 1, 2017.

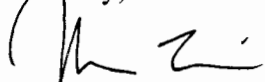
The department will assist agencies to identify and establish measurements that agencies may use to determine if their pay plans are successful. The department proposes that agencies be required to include these preliminary metrics in the agencies' pay plan rules when each agency submits its pay plan rules to the department for review and approval as established in policy. The department will assist agencies in completing and reviewing their pay plan rules by June 1, 2018.

*Recommendation #4 – We recommend the Department of Administration take a more active role in the pay change process including developing and implementing an annual review process of pay changes to determine if they are properly supported based on agency policy, updated state policy, and union collective bargaining agreements.*

**Department Response:** Concur

The department concurs with this recommendation and will begin to conduct annual audits after the changes recommended above are in place. We will begin planning for this audit after policy changes are completed and agency pay plan rules are final. We expect the first audit will be complete by July 2019.

Sincerely,



John Lewis, Director

cc: Anjenette Schafer, Administrator

# Memo

**To:** Montana State Library Commission

**From:** Jennie Stapp, State Librarian

**Date:** March 27, 2017

**Re: Legislative update**

## **Budget:**

The House passed **House Bill 2**, the state budget bill, and Senate Finance and Claims is holding hearings on the bill and will take Executive Action tomorrow. Then the bill will go to the Senate Floor. Our HB 2 budget includes the following:

- The 5% reduction in operating expenditures and IT Convergence savings as proposed by the Governor. The Commission considered how to address this reduction at your December 2016 meeting.
- An additional 2% vacancy savings applied to all agencies that are subject to vacancy savings. This vacancy savings totals approximately \$47,000 annually and is in addition to the 4% vacancy savings included in the Governor's budget. MSL currently has one position vacant.
- A very small inflationary increase for some software maintenance and other operating costs. This increase totals \$8,500 per year and, if included in our final budget will help to offset some of 5% reduction.
- Our federal funding authority to spend our Library Services Technology Act monies.
- Our fixed costs budget including appropriations for rent and information technology costs. HB 2 also includes language that restricts these appropriations for these purposes.
- An additional appropriation of coal severance tax (CST) monies totaling \$75,000 in FY 18 and \$88,000 in FY 19 tied to HB 648.

**HB 648** is the companion bill that changes statute tied to our CST appropriation contained in HB 2. If passed, this bill would eliminate the existing CST Shared Account. Instead, MSL, the Department of Natural Resources and Conservation, and the Department of Agriculture, would each have our own percentage of the CST set in statute. For the State Library, that percentage is .93%. This amount is based on the past eight-year average of appropriations from the Shared Account, and is about 2% higher than our share of the funding in this account over the current biennium. The total new appropriation would be about \$1.036M for the biennium and is about \$92,000 for the biennium higher than what was appropriated last biennium and about \$305,000 more than actual FY 16/17 expenditures.

### **Agency Bill:**

**HB 261** – The bill extends the sunset date for the statutory appropriation contained in 22-1-327, Montana Code Annotated until July 1, 2023. The appropriation of state general fund monies is made to Montana public libraries based on a per capita/per square mile formula found in Administrative Rules of Montana. The total annual appropriation is \$395,766. This amount is the equivalent of \$.40/capita of the population of Montana at the time the statutory appropriation was created in 2013. The statutory appropriation is tied to the decennial census. If passed, the amount of \$.40/capita will be applied to the population of Montana as determined by the official 2020 census. The appropriation passes through the budget of the Montana State Library. The State Library retains none of the funding for administrative purposes. The bill was passed unanimously by the House Appropriations Committee and was passed on the House Floor by a vote of 91 to 7 (two legislators were absent). Senate Finance and Claims heard the bill in early February. The Committee has yet to take action on the bill.

A significant part of our outreach effort for this legislation has been the use of local “state aid stories” that staff prepared with input from local libraries. In addition to using these stories in print form and on social media, the stories can now be found through a new story map: <http://arcg.is/2m0g1Xo>

### **Proponents:**

**HB 390** – This bill is largely an educational funding clean-up bill but it also contains the Governor’s proposed fund transfer of \$1M per year of the biennium from the school and technology account to be given to schools to use as a state match for broadband expansion for schools under the E-rate modernization order. Though libraries are not

eligible for this funding, improved broadband access benefits Montana communities and we often see opportunities for schools and libraries to collaborate to support broadband. The House passed HB 390. It will be heard next by the Senate Education Committee.

### **Informational Witnesses:**

**[HB 61](#)** – If passed this bill would mandate the development of a Next Generation 911 system for Montana. As proposed, the state would use 911 monies to fund network upgrades, to create a 911 plan for Montana and, through MSL, to conduct a GIS data assessment. The assessment would determine data gaps that exist across Montana and would help to prioritize the collection of GIS data to support Next Generation 911. Note that the Legislature significantly amended [SB 95](#), which would have authorized the transfer of 911 monies to the General Fund. SB 95 no longer includes the transfer of 911 funds.

**[HB 360](#)** – This bill creates a Surface water assessment and monitoring program and steering committee that, if passed, will be administered by the Montana Bureau of Mines and Geology (MBMG). The State Library would have a statutory seat on this committee. MSL already sits on MBMG's ground water assessment program. House Appropriations tabled HB 107, a similar bill that contains an appropriation for this work.

### **Additional legislative updates:**

**[HB 13](#)** – The state pay plan bill includes a 1% state employee pay increase in each year of the biennium. House Appropriations heard the bill and the bill awaits action. The House must approve the bill by March 31 or it will die.

**[SB 152](#)** – This bill clarifies language pertaining to state employee definitions and contains the state employee insurance credits that are normally contained in the pay plan bill. The Legislature passed the bill and it awaits the Governor's action.

**[HB 439](#)** – This bill would restrict supervisory pay to only those state employees who supervise six or more employees. Currently this authority is granted in our Broadband Pay Plan Policy that the Commission adopts. House State Administration passed this bill. House Appropriations heard the bill and the bill awaits action. The House must approve the bill by March 31 or it will die.

**SB 294** – This bill would revise laws related to the state broadband pay plan, it would create occupational wage ranges to determine compensation and it would require the Governor’s Office of Budget and Program Planning to review and approve changes to an agency’s classification of an occupation. As written, it appears as though these changes would reduce agencies’ roles in determining pay adjustments for employees. The Senate passed this bill and House State Administration heard the bill on Friday. The committee has not yet voted on the bill.

**HB 81** – This bill, which has passed the Legislature and been signed by the Governor, grants the Secretary of State’s Office the authority to produce the Administrative Rules of Montana (ARM) in printable, electronic format only. MSL evaluated the bill and found that it was in keeping with our state publications management plan. MSL will plan an outreach effort in order to ensure that libraries are aware of this change and have the tools necessary to provide access to the online version of ARM.

**HB 364** – This bill expressly grants authority to representatives of places or accommodations to ask about the use of service animals and provides a process whereby those representatives may make claims against individuals if the representatives suspect the fraudulent use of service animals.

For more information or to track bills of interest visit:

[http://laws.leg.mt.gov/legprd/LAW0217W\\$BAIV.return\\_all\\_bills?P\\_SESS=20151](http://laws.leg.mt.gov/legprd/LAW0217W$BAIV.return_all_bills?P_SESS=20151).



# Memo

**To:** Jennie Stapp, State Librarian      **To:** Montana State Library Commission

**From:** Evan Hammer  
Digital Library Director

**Date:** March 16, 2017

**Re: Code of Conduct**

Staff requests adoption of a Code of Conduct for the MSL reading room.

Staff desires to create a positive patron experience for all users of the State Library and a positive work environment for staff. The proposed code of conduct clearly states expectations for patrons and gives staff the adequate support they need when they must address behavior concerns.

In consideration of the feedback from the State Library Commission about the draft code of conduct received during the December Commission meeting, staff have revised the code of conduct to clarify that patrons must follow State of Montana policies for use of State space and reframed the code of conduct in a positive manner.

Of additional note, staff kept the language regarding food in the reading room due to the lack of janitorial services to address any concerns.

# Montana State Library Commission Policy

## Code of Conduct

The Montana State Library provides for the discovery and access to valuable information resources including Montana State Publications as well as information about the Geography, Biology, and Natural Resources in our state. We have staff on hand to help patrons identify and access materials important for their needs. The State Library also provides technology resources, including public access computers, available for patrons who seek access to digital collection and resources.

The Montana State Library wishes to create a safe and pleasant environment for all library patrons and staff. To ensure a positive experience for our users of the Reading Room, the Montana State Library requires all patrons to comply with the State of Montana **Conduct and Use Policy for State Space and State Grounds in Helena**. That document is available online at:

<https://montana.policytech.com/dotNet/documents/?docid=779&public=true>.

To further ensure a comfortable space, the Montana State Library also asks that patrons respect and follow the MSL Code of Conduct. Patrons shall:

1. Properly use library materials. Patrons may not remove library materials from the library without proper authorization.
2. Properly attend to all personal items. The library is not responsible for lost or stolen personal items. Staff may remove items left unattended longer than 30 minutes..
3. Use Public Access Computers in a manner in keeping with the computer use policy.
4. Respect and comply with all reasonable requests of library staff members.

Patrons shall not:

1. Consume food in the library.
2. Sleep in the library.
3. Be under the influence of alcohol or controlled substances while in the library.

Staff may ask patrons who do not comply with this code of conduct to leave the library. If a patron refuses to leave the library when asked, library staff will summon capitol security. Serious or repeated violation of any of these rules may result in the patron being banned from the library. Bans may be appealed to the State Librarian.

If the library staff believe the actions of a person constitutes an immediate threat to patrons or staff, library staff will call 911 as outlined in the Justice Building Emergency Action Plan; no warning to the patron is necessary.

# Memo

**To:** Montana State Library Commission

**From:** Tracy Cook and Cara Orban

**Date:** March 29, 2017

**Re:** Recommendation to accept the LSTA Five-Year Evaluation for IMLS

MSL recommends that the Commission accept the five-year evaluation for Montana's Library Services & Technology Act (LSTA) program as presented for submission to the Institute of Museum & Library Services (IMLS). Dr. Anthony Chow of Greensboro, North Carolina was selected through a limited solicitation process to complete this independent evaluation, and has prepared the accompanying evaluation report for IMLS, as well as the more extensive report for MSL, which is also included in the Commission materials for this meeting.

All State Library Administrative Agencies (SLAAs) are required, per IMLS' authorizing legislation, to facilitate an independent evaluation of LSTA-supported programs once every five years. IMLS provides guidelines for the evaluator to follow pertaining to format and evaluation methodology, as well as a set of retrospective questions to measure to what extent the goals of the SLAA's 2013-2017 five-year plan were addressed, and a set of process questions to address how data from the annual State Program Reports has been shared and utilized to guide activities included in the five-year plan.

The 2018 – 2022 five-year plan for Montana is due to IMLS on June 30, 2017. MSL staff have set a timeline to prepare the new plan:

- March 23: Review LSTA evaluation recommendations with Statewide Library Resources staff and solicit ideas for implementing these recommendations
- April 27: Lead planning session for LSTA five-year plan with Network Advisory Council

- May 12: Share draft with the public and the library community for their input
- Late May: Share draft of 2018 – 2022 five-year plan with Commission for review
- June 14: Ask Commission to discuss and vote on 2018 – 2022 five-year plan as presented for submission to IMLS
- Tentative: Follow up Commission meeting to approve the final 2018 – 2022 five-year plan;
- June 30: Submit approved 2018 – 2022 five-year plan to IMLS.



***Library Services and Technology Act (LSTA)  
Evaluation Report  
2013-2017***

Anthony Chow, PhD  
Strategic Performance Systems, LLC  
March 12, 2017

Commissioned by the State Library of Montana  
Jennie Stapp, State Librarian  
Tracy Cook, Director of Statewide Library Resources  
Cara Orban, LSTA Coordinator/Statewide Projects Librarian

# Acknowledgements

This project was made possible in part by the Institute of Museum and Library Services.  
(Este proyecto ha sido posible en parte por el Instituto de Servicios de Museos y Bibliotecas)

Special thanks to all that contributed so much time and effort into this project:

- Cara Orban, LSTA Coordinator/Statewide Projects Librarian
- Jennie Stapp, Montana State Librarian
- Tracy Cook, Director of Statewide Library Resources
- All Montana State Library staff who put so much time and hard work into this evaluation
- The committed and dedicated Montana librarians who participated
- All Montana library patrons

It is my sincerest hope that the results of this evaluation will serve the Montana State Library and the people of Montana in building the strongest library and information services possible that will help the greatest number of people.

Sincerely,

Dr. Anthony Chow

CEO, Strategic Performance Systems, LLC

## Evaluation Summary

The Montana State Library's Five-Year 2013-2017 LSTA evaluation took place over a six-month process from August 2016 to January 2017. A total of 253 participants took part in interviews (n=5), focus groups (six focus groups, n=23), four site visits spanning five days in Montana (four different libraries were visited), and a community wide survey administered to the general public (N=161) and also mailed to a random sample (N=54). In addition, 10-years of public library statistics was analyzed to identify longitudinal trends and existence of significant relationships between library inputs, outputs, and community quality-of-life factors.

Montana's population is "graying" faster than the national average as its senior population is growing at a higher rate and exceeds the national average by 2.3%. While on par with, or doing better than the national average on several quality-of-life factors as measured by the US Census Bureau, Montana is below the national average in terms of median household income and per capita income over the past 12 months and above the national average in terms of poverty rate. Because of the downturn in the economy in a number of natural resource staples such as coal, timber, and oil that generates jobs and a more robust tax base, loss of jobs, and the continued shifting of the population towards seven of Montana's largest cities, Montana is in a state of transition, which as a macro context, has potential implications for library services in terms of resources, services, and programming.

In focus groups with state library staff and library directors from across the state and the statewide survey, the four main ways libraries can continue to serve the Montana community are through programming focused on life-long education and entertainment, providing technology and digital access, providing books/magazines/newspapers/information, and providing access in terms of hours/location/ease-of-use/different formats. The State Library can best support libraries in five significant ways – Continue supporting "economically distressed" libraries whose local budgets have been recently cut while digital demand and cost continue to increase; Focus integrated support in workforce development, digital literacy, and Internet access (librarians report these are commonly interrelated issues with patrons, especially when looking for jobs and trying to use resources); Community education and outreach – much of the community does not seem to understand what libraries can do for them; 4. Continue taking the lead in statewide resource sharing (MSC and ML2G, etc); and 5. Address concerns from some libraries about the "graying of the field" and the inability to recruit new library professionals or retain existing ones because of inadequate salaries and/or training.

Overall public library support in Montana has been consistently strong over the past ten years from 2006 to 2015. Public libraries have seen local support (library income per capita) and state support (State Income Per Capita/Per Square Mile) continue to increase. Use of public libraries has also continued to grow in certain areas. Juvenile circulation of library resources has grown annually (except for a small dip in 2013) and increased overall by 12% from 2006 to 2015. Adult circulation has fluctuated, experienced a big dip in 2013, but continues to increase largely to digital circulation. Overall total circulation has remained relatively static but with a clear shift towards digital circulation. Program offerings, consistent with national trends, have shown statistically significant increases over the past 10 years in young adult, adult, and overall programming offered; children's programs also increased by 42% but was not statistically significant. [See Appendix E3.](#)

Library automation also experienced statistically significant growth in three areas – number of computers available, full-text online databases available, and public Internet terminals. At the same time, however, patron demand clearly also changed as the total number of

computer users and annual computer usage actually dropped by 40%. While the demand for online access continues to increase, the demand for computers appears to be decreasing rapidly. Wireless and Wired bandwidth continues to increase in importance as patrons and staff uploads and downloads in public libraries have increased at statistically significant levels. Wireless sessions have also increased significantly. All other traditional library metrics have remained relatively stable over the past 10-year period, which is significant because it does not support the general societal notion that people are using libraries less; rather, they are using them differently. [See Appendix E3.](#)

**Libraries and Quality-of-Life** - A high positive return-on-investment was found as more money per capita was invested in a public library. Library per capita income was found to have statistically significant positive relationships/correlations with a wide number of other library inputs and outputs: overall percent of registered borrowers, circulation per capita, collection per capita, expenditures per capita, and visits per capita. Another high positive return-on-investment was found as a main (or the only) library is open more hours. Weekly service hours of the main branch and overall weekly hours of all branches were found to have positive and statistically significant relationships with a long list of library inputs and outputs including all categories of circulation, collection, staff with MLS degree, and total visits to the library. To increase overall annual per capita visits to a public library, one should consider increasing the collection per capita, expenditures per capita, income per capita, and overall percentage of registered borrowers. While these are not causal or direct relationships there are real statistically significant and positive relationships; as one goes up so most likely will the other. [See Appendix E3.](#)

**Primary Challenges and Opportunities Facing Montana Public Libraries** - The primary challenges currently facing Montana libraries are funding/budgets, adequate staffing, physical accessibility, and resources. The primary opportunities are providing life-long learning programming, ensuring adequate and well-trained staff, continued partnerships and community advocacy, and marketing and outreach. In addition, a special type of library, Tribal College Libraries, face a number of unique challenges on all fronts (e.g. financial, cultural, historical, staffing, etc.) and the State Library could help most by providing a consultant (preferably a tribal member) that helps with communication, partnerships, and collaborations between local public libraries and tribal nations; prioritize services to tribal members in public libraries; prioritize services and programming for tribal youth; and finally digitization as there are many artifacts and aspects of tribal history that are being lost. Montana librarians and patrons feel the top three ways public libraries serve the Montana community are through life-long learning programming (with an emphasis on early child and adult literacy), providing access to technology and digital access, and providing access to high quality books, magazines, newspapers, and other information.

**Montana's LSTA Program** - Montana librarians were most satisfied with State Library services in the areas of OCLC group services, Montana Shared Catalog, the CE program, the MTBL, and early literacy. Evaluation participants were least satisfied with EBSCO Discovery Services, the courier service, consulting, downloadable e-content, and the MMP. SWOT analysis found that the LSTA program's greatest Strengths include its statewide services such as MSC, TBL, MMP, consulting, training, excellent staff, with strong centralized projects that continue to improve. Primary Weaknesses include the ongoing challenge in providing electronic resources to all Montanans, a need for closer alignment between inputs, outputs, and MSL's strategic plan and LSTA goals (lack of focus at times), ongoing evaluation informed by clear, measurable



goals, increasing cost of the MSC, marketing and outreach about the SLR/LSTA activities, and being perpetually at or near complete capacity and always near their breaking point.

The LSTA program's greatest Opportunities include increasing partnerships with vendors and suppliers, improved communication as a team and organization, understanding local issues that may have statewide impact at a deeper level, creating a strong evaluation plan to ensure alignment with the new strategic plan, taskforce recommendations, and LSTA goals, continuing to improve on existing projects, the success of their new lifelong-learning position, and continued use of data and performance-driven planning and evaluation. Finally, its greatest Threats include budget and concerns around it, loss of buying power or sustainability of existing programs and services, being stretched too thin, and tension between big and small libraries.

**Progress Towards IMLS Priorities and LSTA Goals** - Five of the nine IMLS priorities were clearly achieved while four - #6 (targeting library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills), #5 (Developing public and private partnerships with other agencies and community-based organizations), #7 (Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line), and #4 (Enhancing efforts to recruit future professionals to the field of library and information services), were lower rated and less prioritized during the 2012-2015 evaluation period.

All four LSTA goals were achieved, although Goal 3 (MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons) received only 4% of LSTA funds allocated. Goal 1 is *MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered*. A total of \$1,324,588.16 or 33% of all LSTA funds were allocated to this goal in 2012, 2013, 2014, and 2015. Staff's overall satisfaction with accomplishing the goal was 6.42 out of 7.0. Goal 2 is *MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services*. This goal was the lowest rated (5.75 out of 7.0) by staff yet had the highest percent of LSTA funds allocated with \$1,718,069.13 or 43% of all LSTA funding from 2012-2015. Three of the most significant activities implemented was the Montana Shared Catalog, MontanaLibrary2Go which circulated 4,862,102 e-resources to 60,064 new patrons from 2012-2015, and the Montana Memory Project (MMP).

Goal 3 is *MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons*. Goal 3 was the highest rated goal by the staff but only accounted for \$146,709.54 or 4% of total LSTA allocations. Closer examination of the logic model for this goal, however, shows that objectives 3.1, 3.2, and 3.3 were integrated with Goal 2 and accomplished; in addition, a wide variety of activities and outputs were accomplished for this goal including Ready2Read training events, Summer Reading training, and traveling makerspaces. Goal 4 is *MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need*. This was the second highest rated goal and accounted for \$767,876.12 or 19% of all LSTA allocations from 2012-2015. Significant outputs include the conversion of 1,144 titles from analog to digital format, a patron outreach project (POP) which

added 1,588 additional patrons, and the distribution of 1,231,614 items from 2012-2015.

**Focal Areas and Focal Groups** - Five of the six Focal Areas have been clearly addressed and Focal Area 4 (Economic & Employment Development) will become a current and future priority due to the creation of a new Lifelong Learning full-time position at the State Library. Three focal groups were clearly addressed with substantial focus (10% or more of all LSTA funds): Individuals with disabilities, the library workforce (current and future), and families. Although less of a consensus among staff, children (0-5) and school-aged youth (aged 6-17) have also been somewhat addressed.

**Process Questions (B1-B3)** - SPRs have been used to help guide overall activities although the previous text-based only format made it much more difficult to use than the new more quantitative input, output, and outcome-based system (B-1). No major changes were made to the 2013-2017 five-year plan despite significant staffing turnover and some major cuts in state-level funding (B-2). SPRs are widely shared and disseminated with MSL stakeholders (B3).

**Methodology Questions (C1-C4)** - An objective, outside, third-party evaluator, Dr. Anthony Chow, was selected and conducted the evaluation in a valid and reliable fashion utilizing a full evaluation plan, evaluation cross-walk, and evaluation logic-model (C1). A mixed-method approach was used to collect and analyze data using qualitative and quantitative methodology. This included the use of interviews, focus groups, survey, and site visits as well as analysis of 10-years of Montana public library statistics using Pearson-R correlation and ANOVA (C2). All major stakeholders were included in the sample – staff, administrative committees, librarians, and patrons. Sampling included stratified sampling intended to ensure diverse perspectives in terms of types of libraries from different regions of the state. In addition, 100 residents from each of the six federations were randomly selected and mailed a print survey. The total sample for the evaluation was 253 participants. This included interviews (n=5), focus groups (six focus groups, n=23), four site visits spanning five days in Montana (four different libraries were visited), and a community wide survey administered to the public (N=161), which was also mailed to a random sample (N=54) (C3). Two reports were generated from the evaluation – a full report and this final report that adheres to IMLS guidelines and page limits. Both reports will be widely shared with all MSL stakeholders and major findings and recommendations will be disseminated on a specially designed website as part of this project (C4).

**Future IMLS Priorities, Focal Areas, and Focal Groups for 2018-2022** - Composite survey rankings for staff, librarians, the SLC/NAC, and the patron random sample identified five IMLS priorities to focus on over the next five years: #1, #8, #3, #2, and #7. The composite rankings for focal areas prioritized Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Institutional Capacity (Focal Area 3), and Human Services (Focal Area 5). The composite rankings for focal groups prioritized school-aged youth, families, children, individuals with limited functional literacy, individuals with disabilities, and the library workforce as their top priorities.

**Recommendations:**

1. Continue improving evaluation activities by developing an evaluation process aligned with the State Library's new strategic plan and three strategic directions.
2. Utilize a logic model as both a real-time planning and evaluation tool to ensure all LSTA allocations are identified as inputs toward, and are aligned to, specific LSTA five-year goals.

3. Prioritize IMLS Priorities #1 (Expand services for learning and access to information and educational resources in a variety of formats), #8 (Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks), #3 (Provide training and professional development), #2 (Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities, and # 7 (Target library and information services to persons having difficulty using a library and to underserved urban and rural communities).
4. Prioritize Focal Areas 2 (Information Access), 6 (Civic Engagement), 1 (Lifelong Learning), 4 (Economic & Employment Development), 3 (Institutional Capacity), and 5 (Human Services).
5. Prioritize the following Focal Groups (10% or more of LSTA funding): school-aged youth, families, children, individuals with limited functional literacy, individuals with disabilities, library workforce, ethnic or minority populations, and individuals that are unemployed/underemployed.
6. Support libraries in providing robust support of information access to high priority information and entertainment sources in print and digital formats – weather, email, news (local, national, and world), smartphones (e.g. mobile apps), and information around outdoor leisure activities.
7. Seek to assist libraries in increasing library inputs that have been found to be correlated to quality-of-life factors at positive and statistically significant levels including library per capita income, percent of registered borrowers, weekly hours of main branch, full-time staff with a professional MLS degree, increasing programs and program attendance, and increasing circulation (all types).
8. Use advanced statistical analysis centered around 10-year data trends and significant correlations and analysis of variance for each county and federation to help inform and support the positive impact local libraries are having on their respective communities and quality-of-life.

## Evaluation Report

### I. The State of Montana and Libraries in 2017

#### Montana Compared to National Averages

In 2016, Montana's population is approximately 989,414 people located within 145,545.80 square miles with a population per square mile density of 6.8 compared to the national average of 87.4. Population growth over the past six years (2010-2016) has been 5.4%, which is slightly higher than the national average (4.7%). In terms of age, Montana's population is slightly under the national average for people under 5 years old (6.0 to 6.2%) and under 18 (6.3 to 6.5%) but exceeds the national average in population over 65 (17.2% to 14.9%). Racially, Montana exceeds the national average in population that is White (89.2% to 77.1%) and American Indian and Alaska Native (6.6% to 1.2%) with much smaller percentages of the population that is Black or African American (0.6% to 13.3%), Asian (0.8% to 5.6%), or of Hispanic or Latino ethnicity (3.6% to 17.6%)<sup>1</sup>.

Quality-of-life indicators suggest both positives and negatives in comparison to national averages. On the positive end, a higher percentage of Montana's population live in owner-occupied housing (67.2% to 63.9%), with a higher property value (\$193k to \$173k), lower median owner mortgage costs (\$1,294.00 to \$1,492.00 per month), and lower gross rent (\$711 to \$928) than the national average. In addition, more Montana residents 25 or older have a high school degree (92.8% to 86.7%) and health insurance (14% to 10.5%) than the national average. Montanans are also on par in terms of those 25 or older with a bachelor's degree (29.5% to 29.8%) and people 16 years or older employed (63.6% to 63.3%). In contrast, however, Montana has a lower median household income (\$47,169.00 to \$53,889.00), lower per capita income in the past 12 months (\$26,381.00 to \$28,930.00), and higher poverty rate (14.6% to 13.5%) than the national average<sup>2</sup>.

#### The Role of Montana's Libraries

Library directors from across the state participated in a series of focus groups. They felt that a geographical divide between Eastern and Western Montana appears to be prominently recognized among librarians. There is a general sense that Eastern Montana is not afforded as much as attention, especially since the State Library is in Helena, which is more on the western end of the state. Montana libraries are divided into six Library Federations: Tamarack, Pathfinder, Golden Plains, Broad Valleys, South Central, and Sagebrush<sup>3</sup>. See [Appendix E5](#). Evaluation participants felt strongly that libraries should play a significant role in supporting the quality-of-life of its aging and increasingly senior population. Focus group participants noted there has been a tradition of taking research-based approaches to early-literacy and the same could be done for seniors with an emphasis on life-long learning and other resources and services that support them.

Libraries are also a safe place for communities to gather. For smaller libraries in rural areas, their communities are close knit and everyone knows everyone. Libraries are often the only place for Wi-Fi and connectivity to the Internet and they serve as community hubs and community spaces. One librarian participant on the Eastern end of the state noted, "we are tenacious and do amazing things with hardly anything and it is very hard to ask for help and aid although we desperately need it; we are isolated - both the geography and our economy. We feel we have less resources than other regions; we are good at sharing though what little resources we

<sup>1</sup> US Census Bureau: Montana vs. US Comparison, <http://www.census.gov/quickfacts/table/PST045216/30,00>

<sup>2</sup> Ibid

<sup>3</sup> Montana State Library Federations, [http://msl.mt.gov/library\\_development/consulting/federations/](http://msl.mt.gov/library_development/consulting/federations/)

do have” (Librarian, October 2016). Their community had hoped for an oil boom but it did not materialize and a lot of people are looking for jobs. Their library has become the job center and is the hub of the community and free source of resources, education, training, and entertainment – proctoring online courses, library programs, helping schools with library programs, and summer reading. People are coming as far as 90 miles to attend their programs. In Miles City, they try and provide as many programs as possible especially for the elderly; many people come for the social opportunities as well as grocery shopping and it is one of the hubs of Eastern Montana. Outreach and marketing is the key to letting people know what is available for them while they pass through.

On the Western end of the state there are still significant connectivity issues. One participant estimated that in Missoula close to 40% of people do not have access to the Internet. Because of explosive growth and rapid development, the infrastructure is often not present to support broad band connectivity even in newer developments. Their library is heavily used for its Wi-Fi and connectivity. The library can and should also serve as the community cultural center – free entertainment, arts & culture, programming (especially focused on financial literacy), and even bookmobiles on the road that can bring services to the people. Missoula has a technology bus that visits senior homes and partners with a lot of agencies to provide a place to connect with people. They also have a very strong volunteer corps largely comprised of retired seniors. While more bookmobiles have been rising in Montana to provide essential outreach, there is also the possibility of opening small branches in partnership with schools (e.g. they provide the space and we provide the staff) to provide greater access to both connectivity and resources to rural, underserved areas. Ironically, despite the rapidly increasing population, Missoula’s budget continues to be cut.

In general, participants felt that libraries needed to continue serving as community hubs to provide access to a suite of high priority resources and services such as Wi-Fi and technology, programming for all ages but especially in terms of work force development and job skills and senior services (children and youth services are the highest priority but librarians feel they are doing a pretty good job there already), access to free entertainment, continued access to digital services (e.g. Montana Shared Catalog and MontanaLibrary2Go, etc.), and a safe place for socializing, meeting, and discussing pressing community issues. Although staff and resources are limited, libraries must continue to serve as mediators and leaders that people trust in the community to provide resources the communities need. Although it is recognized that libraries cannot be everything to everyone, they are still committed to trying very hard to be. Training, user education, and outreach are also critical. Both librarians and their patrons need to get up to speed with technology through digital literacy and all the other different programs and services (e.g. workforce development, senior programming, etc.) being asked of libraries. User education and marketing what the library has to offer is also essential. As one participant noted, “Since 2002, at every event held someone says, ‘...oh, this is the first time I’ve been here’” (Focus Group Participant, October 2016). For Native American tribes and tribal members, there is also a concern that there are not a lot of options and increased library services could help many of them break the cycle of poverty that they currently are in. Some libraries are also facing an influx of immigrants that are unable to speak English.

### **Primary Priorities, Challenges, and Opportunities Facing Montana Libraries**

Thematic analysis using codes to help categorize open-ended responses for primary priorities, challenges, and opportunities for Montana’s libraries. Staff, librarians and trustees, and patrons were asked to identify what they think are the top three ways libraries should serve the

community. Coding of open-ended responses identified four major categories – life-long educational programming, technology and digital access, books and other information, and access. Ten primary challenges were identified with a top three consisting of funding, staffing, and physical accessibility. The six primary opportunities facing Montana Libraries included a continued focus on life-long learning programming with an emphasis on literacy, staff, partnerships and advocacy, marketing and outreach, and interlibrary collaborations. [See Appendix E2.](#)

As Montana’s American Indian racial percentage is six times the national average, a few specific questions about tribal libraries were asked on the librarian survey and along with an interview with a tribal college librarian. The findings suggest that for many tribal nations and tribal members there is little to no access to library services or convenient access to either a public library or tribal college library. In addition, the notion of a library is not a traditional service for tribal nations and therefore it is not a part of the daily life of most tribal members. There is also some racial tension at public libraries which border tribal nation territory because tribal members do not pay taxes yet sometimes use adjoining county public library services. In terms of library services and how they can best help the tribal community six priorities were identified: 1) Help with resumes and completing applications – most jobs are government or education-related and there is really very little private enterprise available; 2) Keeping the doors open through outreach and marketing – some tribal libraries do have expanded hours but often librarians find themselves alone in their buildings; 3) Assisting with information literacy and providing materials for our students; 4) Continue serving both college and k-12 students in general (giving them a place where they feel comfortable – some come from 30 miles away); 5) Early literacy is a stated priority for tribal libraries but most do not have many resources or provide much programming to support it, which is mostly due to lack of funds; and 6) Outreach to the community to give them opportunities to learn and have fun in the library.

The State Library could best help tribal libraries in four primary ways: 1) Providing a consultant to take the lead in helping get the tribal college libraries together with the local public librarians to build partnerships and collaboration in the best interest of tribal members and adjoining county residents as well (e.g. sharing their tribal history and archives for example); 2) Prioritizing tribal services in public libraries close to the tribal reservations – tribal college libraries do not have the resources to serve their tribal members in many of the diverse ways public libraries traditionally do. In the ideal, public libraries who are close to tribal lands could receive grant funding to help specifically create services and resources targeting tribal members of all ages; 3) Providing a safe place for tribal youth who typically have nowhere to go or anything to do (like most teens). They need a safe place to congregate and why not libraries? And, 4) Digitization grants. There is a huge need to digitize and archive tribal artifacts as much is being lost, including native languages, as the older generation passes on.

## II. Montana’s LSTA Program

**LSTA Program Organization** - In 2016, LSTA funding is overseen through the Statewide Library Resources Division housed within the Montana State Library. Through this division LSTA funds are used to support six main projects and/or activities – The Talking Book Library, Training & Continuing Education, the Montana Shared Catalog, Consulting, Montana Memory Project, and Lifelong Learning & Statewide Projects. The Network Advisory Council (NAC) directly oversees the State Library Resources Division and the Montana State Library Commission helps oversee the State Library overall. Changes pertinent to the LSTA program did occur over the past five years within the Statewide Library Resources area. A grants position was

eliminated when that person retired, a full time MMP director and Lifelong Learning position was added. In addition, whereas in the past the NAC used to advise the State Librarian directly, it now works directly with the SLR Director instead. LSTA funds in Montana are used to support library development across the state and there is no sub-grant program. The focus is to develop and share statewide resources. An ideal example is the Montana Shared Catalog. LSTA funds allow the State Library to pilot different projects like experimenting with maker kits. It also supports three remote library consultants who can focus on individual libraries and their unique needs in real-time. Each consultant supports two federations and each have a specialty area – one focuses on e-rate, another on strategic planning, and the third is familiar with other federal programs. It also funds an IT staff person and trainer, the Talking Book program, and in general it is used to support infrastructure, innovation, and engagement for all libraries around the state. They try to avoid funding individual projects because of their commitment to scalability for all libraries.

**State Library Priorities and Strategic Directions** - A 2015 statewide study involving all types of libraries and federations examined how Montana libraries should focus their resources and a strategic vision was created: Libraries are leaders in creating thriving communities. Eight focal areas were identified as necessary to achieve this vision – library directors, library boards, library infrastructure, lifelong learning opportunities, public access technology, collaboration, effective governance and funding, and staff<sup>4</sup>. In December 2016, the Montana State Library adopted a new strategic framework<sup>5</sup> stating that its purpose is to “help all organizations, communities, and Montanans thrive through excellent library resources and services with three primary priorities in which to achieve this vision: 1) Foster Partnerships, 2) Secure Sufficient and Sustainable Funding, and 3) Create a Useful Information Infrastructure.”

**LSTA Overview** - In terms of LSTA allocations and projects the past five years has seen an emphasis on OBE (outcomes-based evaluation) and developing metrics in which to evaluate and measure the impact of LSTA-funded initiatives. Qualitative evaluation has always been a tradition but there has been a shift towards more quantitative and performance-based evaluation and planning. One participant noted that the NAC could be the right place to help the State Library develop metrics to help create targets and measures of success. There is a strategic need to be more intentional and performance-based from the implementation side as LSTA funds are not increasing and the fading away of coal-severance tax funds due to the fading market. As far as the LSTA process, they receive the LSTA award in early spring and the State Library gets to work looking at any new program proposals. The NAC reviews proposals and the Commission votes (proposals are new costs and priorities). This process is not highly formal or that closely aligned to the five-year plan. The State Library has been striving to improve this over the last couple of years. The goals from their strategic plan, however, are connected to the LSTA goals and this helps inform how LSTA funds are allocated. In the end, although LSTA funds are only a small portion of State Library funds, it has had a major impact across the state and is especially important given how volatile their statewide funding is given major reductions in their coal severance tax revenue.

Focus groups with representatives with libraries across the state revealed high levels of satisfaction and a strong spirit of collaboration and sharing. Specific areas mentioned were how useful and valuable the consultants were in always being there for them when they were needed. As one participant noted, “If you have a problem they will come to the library right away; they

<sup>4</sup> Montana Library Priorities.PDF

<sup>5</sup> Montana State Library Strategic Framework, [http://docs.msl.mt.gov/aboutweb/documents/strategic\\_framework.pdf](http://docs.msl.mt.gov/aboutweb/documents/strategic_framework.pdf)

do a lot for rural communities” (Focus Group Participant, October 2016). Participants were also unanimous in their support of keeping LSTA allocations centralized, which they feel is the right model for their state as opposed to allocating funds through competitive grants. Other strong positives included the transparency and openness in which the State Library engaged with libraries and willingness to support all types of libraries. Participants who had come from other states who had competitive grant programs also noted several additional advantages to the centralized model – it used to be very difficult and stressful to apply for grants and smaller libraries rarely had the time and resources to prepare and compete for those grants. The bigger and more experienced libraries always applied for and received the grant funding and rural libraries were not competitive because of lack of expertise and resources. Lastly, the centralized model reflects the spirit of support and collaboration of Montana, which helps it remain such a special place to be.

**The Network Advisory Council (NAC)** - This committee is comprised of representatives from all different types of libraries and one of their purposes is to have “the uncomfortable conversations.” For the school library representative, her role was to keep informed by being at the table as she does not feel school libraries have a large voice in general. The State Library Staff encourage the NAC to have conversations about libraries and the role of the State Library and LSTA funding. One member noted that an opportunity for improvement was in the way they set goals and measured progress, “it is a little stale and we need to stop counting stuff but rather point to user outcomes (let’s get Jane Doe’s stories)” (NAC Focus Group Participant, October 2016). They also noted they need to look at what they are doing in a different way emphasizing focusing less about how much money was spent and more on stories of impact of that funding. There was a general sense that the reports given to the NAC were not as useful and informative as they could be.

### **Satisfaction with LSTA Program, State Library, and Services**

Librarians were asked to identify which State Library services they used and OCLC, the Montana Shared Catalog, and downloadable e-content where the three most frequently used services. They were also asked to rate their overall satisfaction with these services and the top three were OCLC, the Montana Shared Catalog, and Continuing Education opportunities. Some participants noted, however, an increased need to advertise and market existing programs (e.g. MTBL) and some concern of bias towards the Western side of the state.

**LSTA Program Strengths** - Strengths of the LSTA program were discussed in interviews, focus groups, and a statewide survey. The LSTA programs greatest strengths include statewide services such as MSC, TBL, MMP, consulting, training, excellent staff, with strong centralized projects that continue to improve. As one participated noted, the State Library, “has provided a clear roadmap to keep things "on the rails" when funding or other pressures have come into play.” Another participant noted that the State Library is viewed with, “Great trust – inside and outside of the library community; impartial, quality organization.” Another participant commented, “The SL’s support and worth is unmeasurable – professional development and opportunity for collaboration; every person I have worked with has been fantastic.”

**LSTA Program Weaknesses** - The LSTA programs greatest weaknesses include the ongoing challenge in providing electronic resources to all Montanans, a need for closer alignment between inputs, outputs, and MSL’s strategic plan and LSTA goals (lack of focus at times), ongoing evaluation informed by clear, measurable goals, increasing cost of the MSC, marketing and outreach about the SL/LSTA activities, and being perpetually at their capacity and always near their breaking point. One participant noted there are also challenges with how best to provide, “support for



specific local library issues, which sometimes end up negatively affecting all libraries, when one library is used to determine state library practices / procedures / laws.” Another noted the growing cost of the highly popular shared catalog, “The new increase (30 cents) for the Montana Shared catalog (where did this cost come from? I do not think this is a sustainable model).” An academic library also suggested the potential for increased collaboration by, “advertising what their process and what is out there that academic libraries can use - maybe we can collaborate and build consortia and resources.”

**LSTA Program Opportunities** - The LSTA programs greatest opportunities include increasing partnerships with vendors and suppliers, improved communication as a team and organization, understanding local issues that may have statewide impact at a deeper level, creating a strong evaluation plan to ensure alignment with new strategic plan, taskforce recommendations, and LSTA goals, continuing to improve on existing projects, the success of their new lifelong-learning position, and continued use of data and performance-driven planning and evaluation. Two major statewide initiatives have taken place in 2015 and 2016 that have helped identify library needs. As one participant noted, “The study taskforce’s focal areas represent opportunities to completely realign based on the needs of our libraries.” Another noted that the State Library could help their decision-making bodies by ensuring that, “data and information needs to come more to us (in easy to understand format) so that we can understand the reports and we can make informed decisions (NAC and State Library Commission).”

**LSTA Program Threats** - The LSTA programs greatest threats include budget and concerns around it, loss of buying power or sustainability of existing programs and services, being stretched too thin, and tension between big and small libraries. As one participant noted, collaboration is key, “lack of shared vision in our consortia; communicating the value of statewide consortia to our members so that they continue to buy in and sustain or increase our operational capacity.”

### III. Retrospective Questions (A-1 to A-3)

**Retrospective Question A-1. To what extent did your Five-Year Plan activities make progress towards each goal? Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?**

As one of the core purposes of this evaluation, progress towards Montana’s four LSTA goals were examined from multiple lenses and data points – through interviews, focus groups, surveys, and using a logic model to measure inputs, outputs, and outcomes. For clearer evaluation purposes, each of the four goals were also split into two parts because each identified multiple purposes within the same goal as originally stated. The State Library staff were satisfied that all four goals were accomplished although Goal 2 Part 1 received a slightly lower rating (5.75 out of 7.0) than all other goals. Closer examination of all LSTA allocations from 2012-2015 suggests that, ironically, Goal 2 received the highest percentage of funding at 43% while Goal 3, the highest rated among staff, received only 4% of total funding.

**Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (Achieved).** Based on triangulated qualitative and quantitative data including a completed logic model for each Goal 1 objective, it appears that Goal 1 and its six objectives has been achieved. A total of \$1,324,588.16 or 33% of all LSTA funds were allocated to this goal. The staff rated both parts of Goal 1 a 6.42 out of 7.0. Completion of the evaluation logic model<sup>6</sup> by the State Library revealed allocated inputs that

<sup>6</sup> As reported by the Montana State Library’s LSTA Coordinator/Statewide Projects Librarian

included 3 FTE for statewide consulting (all LSTA funded) whose focus was to serve Montana libraries on issues related to leadership, broadband, technology planning, projects/ideas, trustee orientation, etc. Overall outputs included site visits to all 82 public libraries, information was provided on a wide range of topics including mobile devices, collection management, OCLC enrollment, services and software, building planning, statistics, human resources, marketing, library policies, social software, MTLibrary2Go, MT Shared Catalog, MT Memory Project, Discover It, EZ Proxy and the MT Library Directory. Other consulting was provided for IT support, filtering, library exhibits, building issues, blogging platforms, school-community library issues, web pages, Internet privacy concerns, RSS feeds, library board and funding body relationships, collection management, e-book creation and self-publishing. Additionally, consultants provided assistance with library districts, administration, disaster planning, technology planning, strategic planning, friends and foundations, CE and professional development, Library Federation plans of service and annual reports, reference resources, technology specifications, board development, intellectual freedom, library standards, and E-rate. Librarian feedback was also positive. One noted, “One of the most helpful – the online training is spectacular; helps alleviate the huge land area.” Another stated, “Nobody in my organization is able to help me with my job; I do not have library training; the training provided by the SL has enable(d) me to serve our organization with these skills as a librarian.” Another librarian observed, “Nice to be able to get an answer within 24 hours and know it is correct.”

**Goal 1, Objective 1 (1.1)** is *Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc.* (M=5.8) and its two activities are *LSTA will be used for MSL staff to research and stay abreast of library developments* (M=5.8) and *LSTA will be used to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision* (M=6.1). Inputs were the three consultants and activities included consulting in support of Montana’s libraries; in addition to their regular duties, they also helped revise the criteria for receiving the “Excellent Library Standards Award” (ELSA). The ELSA recognizes libraries that use MT’s Public Library Standards to assess and improve their services. Other types of libraries can also earn the award based on applicable standards. Outputs included 1,066 libraries (all types of libraries) received the ELSA award. Outcomes included, because of the new ELSA standards, libraries were encouraged to strive harder to improve library services. The public library district transition planning template reduced the stress of the transition to a district and helped keep the process on track. One staff member noted, “MSL is very proactive in training library staff statewide on new technologies, best practices and resources available to library patrons.” Another commented, “In general, I think the state library does a great job of providing training and services. As far as the small public libraries that are facing specific issues or crisis situations, I don’t think that the State Library gets in there, learns about the problems, and advocates. The State Library provides great support, but in a general way.”

**Goal 1, Objective 2 (1.2)** is *Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment* (M=5.5) and its activity (1.2.1) is *LSTA will be used for MSL staff to assist library leaders with these efforts* (M=6.1). Inputs included partial time of one FTE-statewide consultant whose primary activity focused on leading strategic planning and planning sessions. Outputs included conducting 29 meetings from 2012-2015. One participant noted, “MSL does a variety of things for outreach and to assist community libraries to plan and lead within their communities.” Another commented, “There is

still much to be done to connect public libraries, trustees and local government entities but MSL has made a great start by focusing on this goal and dedicating staff/resources in this area.”

**Goal 1, Objective 3 (1.3)** is *Provide consultant services for librarians across the state on relevant topics and technology* (M=6.4) and its activity (1.3.1) is *LSTA will be used for MSL staff to provide onsite consultation and training* (M=6.2). Inputs were partial time of all three FTE Statewide Consulting Librarians. Outputs included 669 site visits, 385 e-rate consultations, 2,818 public information requests, 313 consultant led training sessions, attendance at 3,835 additional training sessions, and seven technology petting zoo training sessions with 110 attendees. Outcomes included a calculated e-rate savings of \$390,157.28 from 2012-2015, library directors gained the knowledge necessary to meet the requirements of the public library standards; State Library consulting contributed to the success of many administrative efforts in small public libraries around the state facing challenging situations. Consultants assisted two libraries in revising interlocal agreements; one library with board reorganization; and one library federation with transitioning to new leadership. Consultants also contributed to the development of a new staffing/compensation plan to assist directors and boards with attracting and retaining excellent employees. With the technology petting zoos, library staff gained experience with current technological devices in order to better serve their patrons and connect them to state-supported online services such as MontanaLibrary2Go. The TPZ allows for technology and digital literacy to be taught for librarians across the state. One participant noted, “I tend to think local staff would be better suited for local training, but not in all cases.” Another commented, “I’ve traveled to provide onsite consultations and worked with others who do so. The topics are timely and relevant, the libraries we visit seem happy to have us there and they seem to be hungry for the information we bring.”

**Goal 1, Objective 4 (1.4)** is *Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities* (M=6.3) and its two activities are *Provide regular venues for librarians to network, share, discuss, and brainstorm* (1.4.1) and *LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters* (1.4.2). Inputs included 1 FTE - Statewide CE Coordinator who managed all CE projects. Outputs included 86 Fall Training Workshops with 861 attendees, 54 library trustee training hours attended by 549 trustees. Additional outputs included the Summer Leadership Institute which involved 36 participants, 20 library staff scholarships to attend a day long training session, four library staff scholarships to attend the Association of Rural and Small Libraries annual conference, and nine scholarships for librarians and member of the NAC to attend national conferences. Outcomes included Fall Training Workshop respondents who consistently ranked the sessions highly: 86 -100% rated the sessions at Fall Workshops as relevant to their jobs, 86-100% rated the session presenters as well prepared, and 78-90% said that the sessions met their expectations. A large majority of attendees also reported that the training was interesting (60-78%), related to their job(s) (60-70%), expanded knowledge or skills (62-70%), and was practical (50-77%). The trustee certification program was also successful - at the 2013 Montana Library Association meeting, the Flathead County Library System was honored as Montana’s first board where all the trustees had attained MSL certification under the state library’s certification program for trustees. This was a significant positive outcome in support of the MSL certification program and a model for other boards. Evaluation at Trustee trainings uncovered a need for template materials to assist library boards in a director search and hire. Through discussion with the CE cohort supported by the Chief Officers of State Library Agencies

(COSLA), it has been determined that this is a common need across states. In response, the CE Coordinator at MSL is working with her peers to develop these materials. Scholarship attendees to national conferences routinely noted “they would never have been able to attend” otherwise.

One participant commented, “Fall workshops, federation meetings, MLA conference are all established face-to-face venues.” Another noted, “As a public library staff member I have attended many MLA workshops, Offline and The Ready to Read Rendezvous. These training opportunities left me with new knowledge and a renewed connection to my greater library community and reinforced my commitment to providing the best possible service to my patrons.”

**Goal 1, Objective 5 (1.5)** is *Expand online/web-based training opportunities, both those developed by MSL staff and those created by others* (M=6.5) and its three activities are *LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars* (1.5.1 part 1) (M=6.3), *LSTA will be used to locate and promote other online training for Montana librarians to attend* (1.5.1, part 2) (M=6.4), and *LSTA will also be used for equipment and software for producing and accessing online training* (1.5.2) (M=5.8). Inputs included 1 FTE CE Coordinator and 82 Citrix GoToMeeting video conferencing licenses (\$10,750.22). Outputs included 432 online training hours, 82 GoToMeeting licenses, 538 State Library certifications, and more than 80 webinars and tutorials added to the MSL Vimeo channel that is linked through the learning portal during the grant period, which resulted in a measurable increase in application to the MSL certification program. In calendar year 2012, there was a 90 % increase in certifications issued; 80 certifications were issued by the MSL; the previous 3 years had an average of 46 per year. Outcomes included the Online Training and Meeting Software pilot gave public library directors, staff and trustees access to online meeting and training software that enables them to virtually meet, collaborate, and share expertise. Webinar evaluations suggest they were well received, archived recordings were popular with library staff, and applications for MSL certification continue to trend up. Applications for Montana State Library Certification reveal that users depend upon online training to supplement their face-to-face training activities. 62.5%, nearly two thirds, of librarians currently tracking their CE in the Montana Library Directory have listed that they have attended a webinar in the past few years. Web-based learning supports the State Library Certification program by expanding the learning opportunities for librarians and trustees, and reducing hurdles such as limited travel budgets, extreme weather, and long distances in Montana. In 2013, Nearly 500 individuals registered to track their CE with MSL, and an average of 80 librarians and trustees apply for certification or renewal every year. In 2014, The application procedure for Montana State Library Certification was moved to an exclusively online process for all library staff and trustees to improve data collection, reduce errors in processing, ease the process for applicants, and create a procedure that is sustainable as requests for certificates continue to increase while staff-time available for processing is decreasing.

One participant noted, “MSL offers webinars, and often promotes training from other sources but has not done much with producing training to share outside MSL.” Another commented, “The catalog of webinars and training is substantial. The next level of development needs to pay attention to best practices in online pedagogy and then effectively promoting the content that has been developed.”

**Goal 1, Objective 6** is *Provide a clearinghouse for information on conventional and online training opportunities* (1.6) (M=6.4) and its activity is *LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats* (1.6.1) (M=5.6). Inputs included 7 LSTA-funded MSL staff that contributed to the development of the Learning Portal throughout this reporting period: The Training and

Development Specialist, the Montana Memory Project Director, a Reader Advisor from Talking Book Library, the Training and Technical Services Specialist for the Montana Shared Catalog, and the 3 library consultants. Outputs include 254 pages created for The Learning Portal, which is a website created and maintained by MSL staff. The purpose of the Learning Portal is to provide a centralized location for online learning resources produced by MSL or, as a result of MSL programs, to support continuing education of library staff and trustees statewide, and to enhance use and understanding of MSL statewide projects and programs. In 2014, The Continuing Education Coordinator adjusted and expanded the Montana State Library Learning Portal to provide easier access to training materials and better navigation so that all library staff could more quickly and easily find relevant on-demand training. 78.5 percent of respondents enrolled in a six-part series exploring online resources that are licensed statewide for libraries and their patrons noted that they liked that they did not have to travel to get training. 57% indicated that they felt connected to the class. Every respondent cited at least two reasons why they liked the online class. Evaluation survey participants noted some opportunities for improvement including, “I know it is available, but find the website fairly cumbersome to get and go through.” Another commented, “Need to understand more about how users want to access the content and how to make sure they know it exists.”

**Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (Achieved).** This goal was the lowest rated (5.75 out of 7.0) by staff yet had the highest percent of LSTA funds allocated with \$1,718,069.13 or 43% of all LSTA funding from 2012-2015. Three of the most significant activities implemented was the Montana Shared Catalog, MontanaLibrary2Go which circulated 4,862,102 e-resources to 102,497 patrons from 2012-2015, and the Montana Memory Project (MMP). Staff overall were satisfied with both parts of Goal 2 (5.75 and 6.08, respectively). One staff member reflected, “Kind of a mix. Some ambivalence what represents content – statewide EBSCO contract to provide quality content to the entire state – used highly by school and academic libraries; centralized discovery services contract which allowed each library location as a one-stop location – did not resonate with the libraries.” Another noted, “Seen significant growth in our MMP – 3 to 4 years, we hired a full-time director – responsible for everything; seen significant growth in libraries contributing to it.” A librarian enthusiastically noted, “It is incredible; surprised how MLTG has grown and expanded; we never anticipated it would have grown as fast as it has; we have heard that ranchers use it all the time in the field; have access to larger collections; really cuts down on the cost for everyone.” Another noted some challenges have come with success, “The Shared Catalog is fairly unique; it is helpful and wonderful model; the MLTG is also incredible – what we are struggling with is it is a victim of its own success; hold times are getting longer and larger libraries are paying more costs rapidly; keeping with the sharing ethos – our per use fee is still less than smaller libraries because we are checking-out more; large libraries face the same budgetary issues – our budgets are getting cut and costs keep going up.” One of the larger library systems reflected, “We have over 100k (.30 cents per item) – costs us \$14k and this will need to come from the book budget as increased use in the electronic resources; if SL stops paying the platform fee.... Can we find a vendor that does not charge a platform fee? Are there other options other than OverDrive?”

**Goal 2, Objective 1 (2.1)** is to *Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually* (M=5.8) and its two activities are *LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources* (2.1.1.) (M=5.9) and *LSTA will also be used to purchase new products for pilot projects designed to determine use and value* (2.1.2.) (M=5.8). Inputs included 0.25 FTE (all LSTA funded) for the Statewide Projects Librarian who administered this project. MSL staff worked with OverDrive to add new libraries, led online trainings for participating libraries on accessing circulation and collection statistics, promotional materials, and support documentation, created step-by-step tutorials on the MSL Learning Portal, created a page documenting membership meetings and committee work on the Statewide Library Resources Portal, facilitated meetings for the membership, Executive Committee, and Selection Committee, worked with the Selection Committee in facilitating the purchase of new content, and provided basic technical support and troubleshooting to participating library staff. In 2012, MSL began covering the \$1,500 one-time-only startup vendor fee for new libraries joining MontanaLibrary2Go. Use of LSTA funds for eliminating startup fees and hosting a central platform for shared content allowed all sizes of public libraries in the state to participate in e-book and downloadable audiobook lending and offer a vast collection of content to their patrons at minimal cost. The new membership cost share formula included three different subtiers within what was previously the lowest tier, to create a more equitable cost structure per patron for the smallest libraries. The new lowest tier for new participating libraries (0-999 patrons) paid an annual fee of \$482 for access to over 22,000 items by the end of FY13, averaging out to under \$.02 per item.

Significant outputs included a total of 92 libraries and branches now participate in MontanaLibrary2Go, a total of 4,862,102 e-resources circulated from 2012-2015, 102,497 new patrons, and 46,797 new items added. The consultants also provided public library staff training and guidance using the Technology Petting Zoo (TPZ), a set of tablets and e-readers that library staff can use to experience working with new technology. A total of 11 training sessions took place from 2012-2015 and approximately 140 attendees. Outcomes included the value and popularity of this service inspired many donations from member libraries, Friends groups, and library federations toward the shared content budget in the amount of \$40,396. This amount was collected from 6 public libraries and 4 federations representing all sizes and budgets. The number of checkouts during this period increased by 32%. In 2013, Circulation (number of checkouts) increased by 23%. In 2015, during the reporting period, while annual fees for member libraries increased by 5%, the number of e-books and digital audiobooks available to all MontanaLibrary2Go registered users increased by 8% from 28,410 in the FY14 LSTA reporting period to 30,748 total copies in the FY15 LSTA reporting period. The number of Montanans making use of MontanaLibrary2Go increased during this reporting period, as did their level of activity. Circulation (number of checkouts) increased by 15%, from 749,996 in the FY14 LSTA reporting period to 862,563 in the FY15 LSTA reporting period. During the reporting period, 13,207 new accounts were created and the total number of library patrons registered increased by 17%, from 63,365 in the FY14 LSTA reporting period to 73,889 in the FY15 LSTA reporting period. In 2012, a total of 20,314 items were available in MontanaLibrary2Go at the end of this reporting period, resulting in a greater selection for patrons and a greater return on investment for participating libraries. In 2013, a total of 22,539 copies of e-book and audiobook titles were

available in the shared collection at the end of this reporting period. One librarian commented, “When I pay our MontanaLibrary2Go bill, I know I am buying WAY MORE than just access to the materials. We are also getting top-notch professionals to do the selection and acquisition of those materials. And I am so grateful that you do this for all of us. Thank you selection committee!” (Dillon Public Library staff). One staff member noted, “Unfortunately, some of the e-content has been cut, but on the other hand some of it was not used enough to cover the cost.” Another commented, “MSL and libraries have learned so much over the past five years about content, content delivery, and online resources. These lessons have been invaluable as we move into strategic planning and resource allocation in the future.”

**Goal 2, Objective 2 (2.2)** is to *Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources* (M=6.6) and its two activities are *LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP* (2.2.1) (M=6.4) and *LSTA will also provide high-quality digitization equipment for libraries to use* (2.2.2) (M=5.2). Inputs included 1 FTE (Montana Memory Project Director); in-kind match = 100 hours contributing library staff time. LSTA funded the salary, technology infrastructure, and travel for the MMP Director position. Outputs included 320 training presentations with 3,240 attendees, 86 outreach visits, 47 new collections added, 407 total collects hosted on MMP website, 292 contributing institutions, 3,892,018 images hosted on the MMP site, the addition of 359,164 images during the evaluation period, and 299,199 website visits. Outcomes included training presentation attendees gained the skills they needed to contribute new collections to the MMP, subsidizing the cost of the content management software and digital archive software and maintaining the website allowed libraries to create and share digital content online that they may otherwise would not have the financial resources or staff time and expertise to share. The statewide platform also allowed that local content to be exposed to a wider audience that it would have otherwise. One staff member noted, “The MMP is one of the most valuable assets that MSL will continue to develop with its partners” and another commented, “MMP switched to centralized digitization rather than providing equipment, but otherwise, met these goals.”

**Goal 2, Objective 3 (2.3)** is to *Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons* (M=5.3) and its two activities are *LSTA will be used for MSL staff to research and evaluate existing and beta products* (2.3.1, part 1) (M=5.2), *LSTA will be used to negotiate statewide discounts* (2.3.1, part 2) (M=5.6), *LSTA will be used to train librarians and patrons in use of existing and new products* (2.3.1, part 3) (M=5.6), *LSTA will be used to develop materials to promote use of the tools across the state* (2.3.1, part 4) (M=5.6), and *LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources* (2.3.2) (M=5.8). Inputs included \$32,000 that provided one year of access to a unique, customizable instance of EBSCO Discovery Service for all Montana libraries and 0.25 FTE Statewide Projects Librarian. Outputs included access to 800 EBSCO databases, 53 training sessions with 446 attendees, and 347,724 searches. Outcomes included in 2013, Discover It use in libraries increased by 22% and in 2014, EDS usage increased by 9.7%. One staff member noted, “Statewide Projects Librarian is paid through state funds, not LSTA, so “LSTA will be used to negotiate statewide discounts” needs to be reworded. If we mean, ‘LSTA will be used to subsidize statewide discounts,’ that would be more accurate.” Another noted, “I think it would be important to measure how widely used the tools and databases are before expanding. If such tools are deemed appropriate, expansion would of course become a priority, and then funding becomes an issue.”

**Goal 2, Objective 4 (2.4)** is to *Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web (M=6.7)* and its activity is *LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff (2.4.1) (M=6.7)*. See Table 57. Inputs included 4 FTE (2.34 paid with LSTA and 1.66 from member fees). Outputs included \$714,626.62 in MSC allocations, 54,560 help requests, 223 training sessions with 2,474 attendees, 50 libraries added, and payment of \$112,761.16 in startup and migration fees. MSC staff is responsible for web development, installing and maintaining hardware, installing and updating software, administrative support, database management, new library implementation, providing technical support and training for new libraries, and training member library staff to use MSC tools. Outcomes included participating libraries saved staff time on systems work that the MSC staff covers on their behalf. Participating library staff gained knowledge about using the ILS software and about copy cataloging. LSTA funds are available to help libraries with start-up costs. Joining the MSC led to increased access to library materials for patrons of new MSC libraries. One staff member noted, “A new library just joined the MSC last month and there are others working steadily toward meeting the basic requirements to get started” and another commented, “This would seem to depend on statewide broadband access and the viability of the resources depending on user wants and needs.”

**Goal 2, Objective 5 (2.5)** is to *Explore opportunities to improve Internet access and technology support for libraries (M=5.9)* and its two activities are *LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources (2.5.1) (M=5.9)* and *LSTA could also be used to assist libraries with enhanced access when appropriate (2.5.2) (M=5.9)*. This objective was addressed in objectives 2.1-2.4. One staff member noted, “There are still areas in MT that need vastly improved internet access. Large metropolitan areas take this access for granted” and another commented, “MSL and the State Librarian are leaders in this area.”

**Goal 2, Objective 6 (2.6)** is to *Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items (M=6.4)* and its two activities are *LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries (2.6.1) (M=6.1)* and *LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue (2.6.2) (M=6.4)*. Inputs included 0.25 FTE Statewide Projects Librarian, paid with state funds; state match = \$98,886; non-state match = \$369,730; in-kind match = 45 hours’ member library staff time. Enrolled libraries have access to discovery, cataloging, and interlibrary loan tools, with costs based on a formula that keeps OCLC affordable for all libraries. The Group Services contract includes access to CatExpress, Connexion, FirstSearch, WorldCat, and WorldShare Interlibrary Loan. The Statewide Projects Librarian administered the OCLC Group Services project. Outputs included \$287,134.00 to offset costs to participating libraries, 1,841 (all libraries) libraries enrolled to receive discounted services, 16,409 original catalog records added to WorldCat, 843,748 records updated, 193,787 ILL requests filled (borrowing), 345,070 ILL requests filled (lending), \$16,334.00 for pilot courier project, \$ 23,977.18 for startup costs for joining the courier service, 80 libraries are receiving the discount.

Outcomes included MSC library patrons increased their holds on library materials from other MSC libraries by 7.37% (from 271,627 in 2012 to 291,662 in 2016). The consortium also



increased the number of libraries sharing items with one another via direct patron holds by 30% (from 61 libraries to 79 libraries). During a three-year system reorganization project, staff identified and removed nearly 1,000 unused policies and unused reports from the system; various processes done by MSC staff are now much faster: Time to add a new library from 120 to 50 hours (58% decrease), Adding a new branch from 20 to 8 hours (60% decrease), Adding a library to a sharing group from 20 to 6 hours (70% decrease), Changing a library to eliminate fines from 5 to 0.5 hours (90% decrease), Changing circulation rules from 2 to 0.5 hours (75% decrease). The courier service led to approximately a 90% reduction in cost compared to standard shipping via mail. In May 2013, a survey found that 67% felt that the courier service made a noticeable impact in their library circulation numbers and delivery savings; 56% were also tentatively interested in the possibility of expanding courier service both within MT and regionally. Comments provided on the survey also indicated that there continued to be a wish to have MSL assist with the current courier effort by providing centralized communication tools, collecting consistent and standardized statistics, and participating in discussions regarding contracts and service expansion and development, among other roles and responsibilities. In 2013, the courier service served 54 library locations through 18 drop sites that signed service agreements with Critelli Couriers. The Montana State Library holds the contract with Critelli. One staff member noted, “The courier project is excellent but still needs to expand - perhaps investigating other possibilities that travel to more remote areas (food service trucks?)” and another commented, “There has been work and research done to try and expand the range of courier services between libraries. As new libraries join the Montana Shared Catalog some are adding their collections to partner libraries”

**Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (Achieved).** Goal 3 was the highest rated goal by the staff but only accounted for \$146,709.54 or 4% of total LSTA allocations. Closer examination of the logic model for this goal, however, shows that objectives 3.1, 3.2, and 3.3 were integrated with Goal 2 and accomplished; in addition, a wide variety of activities and outputs were accomplished for this goal including Ready2Read training events, Summer Reading training, and traveling makerspaces. One staff member noted, “We put significant emphasis on partnerships through our Broadband initiative; one of the things we heard from libraries (BTOP ended).” Another commented, “This is part of our culture; very strong in developing consortia and collaboration.” A librarian enthusiastically stated, “I think they wrote the book on this – the State Library as a model; Jennie and her staff are just amazing; we are so lucky! They really have shown us how to resource share; seen some minor miracles – they exceed expectations.” Another shared similar sentiment, “Met this goal quite well. When I think of the SL I think of collaboration – consulting, statewide licenses, workshops, and it is all about getting people together; always feel they have the best interest of all of us.”

**Goal 3, Objective 1** is *Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections* (M=6.6) and its activity is *LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC* (3.1.1) (M=6.3). This objective was met with Objective 2.4. One staff member noted, “The various committees and groups within the MSC are in a near constant state of collaboration as they work to share resources and expand services. The ongoing work done by those cataloging and importing records have a direct impact on patron services. Thanks to their collaborative efforts and expanded training on the decisions they have made in this area, the OPAC reflects improvements

that are seen and used by patrons.” Another noted, “More statewide contracts would be beneficial to many libraries (tutor.com., zinio for example).”

**Goal 3, Objective 2** is to *Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools* (M=5.7) and its activity is *LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts* [see goal #2, program #1 above] (3.2.1) (M=5.8). This objective was met with Objective 2.1. Staff noted, “New partnerships are limited by the capacity of the small staff to do it all” while another commented, “Very strongly agree. Not just strongly. This is our future, at least in part.”

**Goal 3, Objective 3** is *Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content* (M=6.3) and its activity is *LSTA will be used for MSL staff to explore and establish partnerships for MMP* (3.3.1) (M=6.1). This objective was met with Objective 2.2.

**Goal 3, Objective 4** is *Continue to develop programming materials and tools for libraries to use* (part 1) (M=5.9) and *Continue to partner with other state agencies and organizations* (part 2) (M=5.8) and its two activities are *LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community* (3.4.1) (M=5.9) and *LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts* (3.4.2) (M=5.2). Inputs included a 0.125 FTE early literacy position and \$58,675.90 in early literacy staff hours. Outputs included 12 Ready2Ready training events attended by 479 people, \$34,805.56 for the R2R program, 32 summer reading training sessions, 770 summer reading program manuals disseminated, six public service announcements, \$41,549.56 for traveling makerspaces, 24 makerspace kits disseminated hosted by 36 libraries, and 85 programs which made use of the kits with 2,901 attendees. The purpose of the Montana Makers traveling makerspace pilot was to create opportunities through local libraries to expose primarily school-aged Montanans to STEAM (science, technology, engineering, arts, mathematics) tools and resources that are not otherwise easily accessible in most Montana communities. Another service provided was Ready2Read Rendezvous which features developmentally appropriate play spaces in libraries and how to integrate play in library programming and space; how to integrate early literacy and developmental information into story hours for mixed ages; and how to position your library as a center of the community for youth programming. Outcomes included the programming focus was most heavily concentrated on the more traditional arts and crafts elements of the kit, as library staff reported their level of familiarity and comfort was highest in this area. 100% of reporting sites organized arts activities (4); 50% planned science-based formal programs (2); 50% planned technology programs (2); 50% planned activities with a focus on engineering (2); and 25% planned math activities (1). Library staff themselves reported having gained new experiences from using the technology and electronics tools in the kit, as many of the staff had never had the opportunity to use them before. In the evaluation, these libraries responded that they were successful in increasing STEM related programming (10 responses); providing new services (five responses); increasing community participation in library programs by attracting new users to the library (four responses); and increasing the number of programs for young adults and teens (two responses). Hosting libraries almost unanimously stated that they benefited from being able to test makerspace materials through the pilot before purchasing items for their libraries (13 responses). In the pre-hosting application, most (12) hosting libraries stated that they believed “technology” would be of greatest interest to young adults, followed by building (five), arts (four), and science (three).

For the Ready2Read Rendezvous, a total of 12 libraries incorporated Countdown to Kindergarten programs in their libraries and in three months after starting the program, 140 kits were disseminated to clients through WIC (Women, Infants and Children) and the Healthy Montana Families program, which sends nurses to visit clients in their homes and teach them about healthy parent-child relationships, safety and early learning. The feedback from Health Department staff and kit recipients has been overwhelmingly positive, with 100% of recipients agreeing with the statement: “After practicing the skills from the library kit, I feel prepared to help my baby or child be a successful person and arrive at school ready to learn.” Some patron comments include: 'My baby was born in September. I never thought to start reading to him so soon. So glad to have books to start reading to him.' 'This is a book I wanted to purchase for my child that I couldn't afford, and now we have it.' 'I'm excited to read the book to my new baby when he arrives.' 'I'm able to continue teaching my son in my native language and also in English now that I have another book to read to him.' One staff member noted, “Great job, especially with providing early literacy program ideas and materials to all libraries.” One librarian noted, “I was able to attend the Maker Space workshop and a staff member attended the STEAM story time workshop at the end of September, so we are feeling pretty comfortable with the kit and excited to start using it. I'm really excited about this opportunity and want to thank you, State Library, and IMLS for this wonderful opportunity to connect more with our patrons. There are so many things we are being encouraged to participate in right now, it is so helpful to have the kit and guidance to provide us with a solid starting point. It makes it “do-able” instead of overwhelming” (Glacier County Library staff).

**Goal 3, Objective 5** is *Continue work with established courier services to find an efficient and affordable system to transport materials between libraries* (M=6.1) and its activity is *LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries* (see goal #2, program 36 above) (3.5.1) (M=6.0). This was specifically addressed in Objective 2.6. Staff noted, “Still a key program. Not quite working right, for everyone, as of yet. There's hope if we hang in there” while another observed, “This work is continuing and has been emphasized in the MSC partner meetings.”

**Goal 3, Objective 6** is *Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives* (M=5.6) and its activity is *LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs* (3.6.1) (M=5.6). Goal 3, Objective 6 was rated slightly lower than other Goal 3 objectives and based on the logic model it appears that this is one objective that may have not been met in terms of LSTA funds being specifically allocated to achieve this objective. The BTOP grant focused on this objective but it did not use LSTA funds although BTOP staff consulted with LSTA funded staff; no other attributable activity on this objective.

**Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (Achieved).** This was the second highest rated goal (M=6.3) and accounted for \$767,876.12 or 19% of all LSTA allocations from 2012-2015. Significant outputs include the conversion of 1,144 titles from analog to digital format, a patron outreach project (POP) which added 1,588 additional patrons, and the distribution of 1,231,614 items from 2012-

2015. One staff member noted, “TBL is a highly valued program” but another noted, “no benchmarks – did not really define success.” Librarians also had similar dissonant views as one noted, “I have a lot of my patrons who use the TBL – parents helping children with learning disabilities” while another observed, “I don’t think this is well communicated across the state; 26 years I have been here – only twice has anyone asked me about it; they don’t know it exists or how to access it; lots of patrons, teachers, and students who don’t know it exists. Can get to it in the shared catalog but need to better advertise it.” Another librarian emphasized how important the service was for patrons, “We have had very positive results with TBL – quite a few patrons that use it; it is their godsend; family members were really depressed and after introduced to talking books – they are just a different person. Don’t let this ever go away – people who use it and love it. You have no vision, physical or reading disability – we have a lot of just amazing testimonials about it; our veteran’s home and nursing homes promote TBL.”

**Goal 4, Objective 1 (4.1)** is to *Continue digitization of recorded Montana materials* (M=6.3) and its activity is *LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers* (4.1.1) (M=6.5). Inputs included 6 FTE and 90 volunteers. This funding covers staff salaries and operations for the Montana Talking Book Library (MTBL). Established in 1968, MTBL provides eligible Montana patrons, ages 3 to 103, with direct personal one-to-one patron service and support for ordering, receiving and/or downloading audio and Braille materials. Outputs included a Digital Transition Strategy which converted 1,144 Montana titles from analog to digital and the Patron Outreach Project (POP), which sought feedback from patrons on what significance and value they place on MTBL services in their lives. They received an 81% patron response. When asked what, if any, impact MTBL services had on the patron’s quality of life? 100% responded positively, with 89% indicating the main leisure reading and entertainment they receive is through MTBL services. 100% indicated they would recommend MTBL services to everyone with a visual, physical or reading disability. 97% indicated they would not have the quality or accessibility of leisure reading materials without MTBL services, siting transportation, and other limited resources available to them. 3% of patrons indicated they have the resources to afford other leisure reading resources, but utilize MTBL services as their main source of reading and entertainment. 90% indicated the quality of the MTBL and NLS collections are excellent with emphasis on the new easier to use and play digital program; while 10% indicated they will miss the cassette collection and player. An overwhelming 100% indicated excellent service from all Readers’ Advisors in areas of response to patron requests, suggested reading materials and technology support. In addition, the The MTBL Digital Recording Program converted 25% (or 231 titles) of our local cassette titles to digital cartridges. New recording software and equipment were purchased during this time period to offer improved audio quality services and software security. The benefit to MT patrons is access to a higher quality of available MT audio titles from a TBL local recording studio. MTBL also submitted its first locally recorded digital book “Hand Raised: The Barns of Montana” to NLS for potential nationwide patron enjoyment in the online BARD collection. Staff noted, “Some materials had been digitized, but this process has been nearly stopped due to lack of funding. There are many more books with Montana interests on the list to be recorded and converted to digital. The software has been purchased, but more cases and containers could be used.” Another noted, “Patrons of MTBL who have come from other places in the US have commented on an improvement in access and service when they come to the Montana agency. The recording studio has various teams working on digitization throughout each day.”

**Goal 4, Objective 2 (4.2)** is to *Continue to stay current with accessible technology available from NLS and NLS-approved providers (M=6.4) and its activity is LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools (4.2.1) (M=6.1)*. Inputs included 6 FTE staff. Outputs included 311 patrons trained on BARD and 43 institutions trained to use BARD. Staff noted, “More promotion of this is needed so the public is aware” while another noted, “MTBL staff are sent for training on new equipment as it is available. They are also given the training URLs for various other products their patrons may use.”

**Goal 4, Objective 3 (4.3)** is to *Continue to update Keystone Library Automated System (KLAS) database as new versions become available (M=6.8) and its two activities are LSTA will be used to purchase KLAS upgrades and provide system maintenance (4.3.1) (M=6.8) and LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources (4.3.1) (M=6.6)*. Inputs included 6 FTE staff. Outputs included Keystone Library Automated Systems (KLAS) updated the MTBL KLAS database system in February, 2014, which offered staff additional database functionality in administering patron support. NLS contracted to receive more commercial books from publishers. In April 2015, the MTBL Reader Advisor and Keystone automated database (KLAS) software administrator attended the KLAS Users’ Conference in Oklahoma City, Oklahoma. Outcomes involved MTBL staff worked with KLAS staff to develop and install a completely redesigned catalogue subject code heading system that would better meet the needs of MTBL patrons, create a more expedited way to get books to patrons faster, as well as give more accurate support to MTBL staff in searching the catalogue. The redesign of the KLAS catalog subject code system greatly improved searching capabilities over what the original database system offered. The end result created a much easier and quicker mechanism of finding the desired books for patrons. Staff noted, “KLAS gets updated on a regular basis and staff at MTBL have a working relationship with that vendor.”

**Goal 4, Objective 4 (4.4)** is to *Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons (M=6.0) and its activity is LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution (4.4.1) (M=6.1)*. Inputs included MSL/MTBL contracted with a marketing firm to develop a 13-month Patron Outreach Project (POP) with the goal of increasing awareness of MTBL, new patrons, and establishing sustainability. Outputs included 1,588 new patrons added. The Patron Outreach Project came to an end on December 31, 2013. The objectives to increase awareness about MTBL were successfully met through educating the public about MTBL services using advertising, social media avenues, and newly revised brochures, mailers, and posters. The project reached at least 503,531 Montanans statewide through newspaper ads, with over 3,000 radio spots, and over 1,200 TV public service announcements and paid ads, including ad placement in specialty magazines and publications. Success was also measured by a 29.6% increase in new patrons signed up with MTBL, a 17.2% increase in new patrons downloading materials, and a 117% increase in public requests for MTBL applications for prospective patrons and institutions.

**Goal 4, Objective 5 (4.5)** is to *Increase the amount of accessible materials to individuals who cannot read standard print (M=6.2) and its activity is LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials (4.5.1) (M=6.2)*. Inputs included 6 FTE. Outputs included 27,640 patrons served, 1,231,614 items distributed, 159,883 books downloaded from BARD, 185 braille patrons, 29,269 braille books delivered, 107,181 patron requests answered by reader advisors, and 111,956 magazine issues distributed. MTBL

also created a small internal children's collection of Twin Vision for Pre-K to 3rd grade. This collection includes Pre-K board books and tactile image books. Twin Vision books are created by taking a standard print book with illustrations and transcribing the text into Braille on a clear plastic overlay inserted on the page. Outcomes included responses to a patron survey on MTBL services were overwhelmingly positive. 80% said that they found MTBL services essential to their quality of life; and 20% would be challenged to find other affordable online resources to serve their needs. The children's collection helps ensure free, accessible and easy-to-use library materials with personal support to state residents who cannot use standard print due to a visual, physical, or reading disability. Reader Advisors fielded 27% more requests from patrons. Staff commented, "Patrons are impressed with the amount of braille twin vision books for children that MTBL has. MTBL purchases and uses the materials to have these books brailled in-house. New materials are added on a near weekly basis."

**Goal 4, Objective 6 (4.6)** is to *Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services (M=6.3) and its activity is LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program (4.6.1) (M=6.4).* Inputs included 6 FTE. Outputs included new brochures and posters were designed for a variety of outreach efforts to include having a presence at appropriate conferences such as Montana Library Association, Brain Injury Alliance Organization, all three Montana Blind and Low Vision Support Organizations, Montana Education Association, Montana Special Education Association, Montana Ophthalmology Academy, Montana Optometric Association, Montana Veterans Association, Montana Nursing Home and Assisted Living Organizations, and community organizations. MTBL staff also led or participated in trainings, conference presentations, or information sessions across the state. One staff member noted, "MTBL is part of the outreach efforts and promotional materials are included. I wonder how many people are reached through these efforts." Another commented, "MTBL goals were maintained, but not exceeded, due to staffing issues (extended illnesses and retirements). MTBL was short staffed especially during 2015-16. In the last 5 years, 4 of the 6 positions have had staff changes. A larger budget would always be nice in a library setting. Conversion to digital books has been virtually halted due to the need of staffing to convert older RC platforms to digital formats."

#### **Were Any Goals Not Achieved?**

Out of 12 staff responses, 11 felt (92%) that all four goals had been accomplished, which is supported by the evaluation logic model.

#### **Retrospective Question A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?**

Staff and librarian participants were asked to rate their satisfaction with how well each of the IMLS Focal Areas were addressed. The top four were **Lifelong Learning, Information Access, Civic Engagement, and Institutional Capacity** although none were rated higher than 5.3 out of 7.0. Focal Area 5 (Human Services) also was somewhat addressed and Focal Area 4 (Economic & Employment Development), which has not been a priority with LSTA funds, will become a higher priority with the creation of a new Lifelong Learning full-time employee starting in the fall of 2016. One librarian noted about Lifelong Learning, "I would say the State library has focused strongly in lifelong education. I see formal education as schools and colleges and I don't think that's where MSL has focused. Rather they have focused in library's early

literacy, and wider access to information” while another noted, “eliminating funding for Tutor.com and EBSCO databases has decreased our K-12 and college students' access to educational learning tools.” Regarding IMLS Focal Area 2 Information Access one librarian noted, “It is very difficult to promote databases. Even though they are provided, it is hard to encourage users to use information resources” while another reflected, “I believe we have really fallen behind on these areas. The website is cumbersome, inaccurate and difficult to navigate. Funding decline has also affected resource availability” In terms of IMLS Focal Area 3 Institutional Capacity one librarian commented, “In regards to operations, the training and information from the state library has a positive impact on the library operations for those who participate and apply the info” while another noted, “I would like to see the State Library use their wealth of knowledge on how public libraries are created and intended to operate so that the communication between the library and the local governing body were more clearly defined and with a mutual understanding of such things.”

IMLS Focal Area 4 Economic & Employment Development (M=4.6) was much lower rated. One librarian noted, “Become more involved in the economic development statewide association; need to encourage all libraries to do this; creating opportunities to become engage(d) in their local communities; changing nature of the role of libraries; get them away from desk and out of libraries” and a staff member commented, “We expect these to be addressed with the Lifelong learning position.” IMLS Focal Area 5 Human Services (M=4.7) was also lower rated. One librarian noted, “The State always offers some form of early childhood training, and I think that's so important” while another commented, “There could be more information for personal, family and household finances available online to the users as a easy access link” (with instructions as user friendly). IMLS Focal Area 6 Civic Engagement (M=5.1) was slightly higher rated. One librarian noted, “Not sure how to address this – is this a priority for us or the state library association?” Another noted, “Making known the resources provided by established organizations, such as Humanities Montana, has enabled libraries (including the one where I work) to host important community conversations.”

**Retrospective Question A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities?**

Staff identified three focal groups that were clearly addressed: **individuals with disabilities, the library workforce** (current and future), and **families**. They were less confident about children (0-5) and school-aged youth (6-17). One staff noted, “Given the paucity of our financial resources, we don't have the luxury of targeting meaningful amounts of funding on any one user group. Instead we do our best to select programs that impact several groups at once. And if these groups are not equally recipients of the benefits of these programs, with luck, we have done enough to affect their lives in positive fashions. This would be a meaningful question if MSL had, for example, 3 to 10 times the financial resources it currently has to address our users and partner's needs.” Another staff member commented, “We need to (be) wise enough with the resources to meet the needs of the groups we prioritize.” One librarian lauded the certification program, “The training and accreditation – we are required to take classes throughout the year; getting certified helps; small towns would not be able to afford a degreed person.” Another school librarian noted, “OPI and the Montana State Library – they should be able to communicate more than they do; they rely heavily on the SL; they just don't do their job; school libraries are kind of dependent on the SL.”

#### **IV. Process Questions (B-1 to B-3)**

##### **B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?**

The staff felt satisfied overall that SPRs were used to help guide overall Five-Year plan activities (M=5.8). Qualitative comments from interviews, focus groups, and survey responses suggests that SPRs were not used “as much this plan” (staff survey response, December 2016) but they were used to help identify activities and provide snapshots for how they were doing. It was noted that the old version was a bit heavy and text based but that the new version is more data driven and outcome-based, which will be easier to use for planning purposes. As another participant noted, “We could use it better” (Staff survey participant, December 2016). While SPRs appeared to be tangentially used to determine future activities, the new data-driven SPR along with the future potential use of a logic model for the next five-year cycle will help increase its use and impact.

##### **B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.**

Despite major changes in staff including the State Librarian during the 2013-2016 period of the plan as well as budget cuts at the state level, the general sense is that the plan remained the same although less emphasis was placed in certain areas due to budget constraints.

##### **B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?**

SPR data was consistently and annually shared with their State Library Commission (their governing body), Network Advisory Council (NAC), and governor’s office. They are also posted on their website, used internally, and shared on their state listserv.

#### **V. Methodology Questions (C-1 to C-4)**

##### **C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of Evaluators.**

The Montana State Library selected Dr. Anthony Chow and Strategic Performance Systems, LLC from Greensboro, North Carolina. Dr. Chow is an Associate Professor at The University of North Carolina at Greensboro’s Department of Library and Information Studies and is CEO of his own consulting firm. This LSTA evaluation was rigorous, objective, and conducted by an independent, third-party evaluator from outside Montana with no previous connections or relationships with the State Library or any of its representatives. Dr. Chow was selected largely because of his requisite expertise in statistical and qualitative research methods, especially within the library field, and demonstrated a high level of competency in rigorously conducting this evaluation. The report and evaluation requirements as stated in the guidelines outlined in IMLS-CLR-D-0019 was used as a significant part of the evaluation framework. Prior to the start of the evaluation, three guiding documents were created to ensure a valid and reliable process was conducted – Montana LSTA evaluation plan ([see Appendix D1](#)), evaluation crosswalk ([see Appendix D2](#)), and evaluation logic model ([see Appendix D3](#)). These three documents served as the foundation for the evaluation and helped ensure that all guidelines and required questions to be answered by the evaluation were identified and accounted for in the evaluation design and evaluation instruments. All evaluation protocol including interview and focus group questions, surveys, and site visits were planned, developed, and aligned to the evaluation requirements to ensure the evaluation and its findings were valid and reliable. The State Library reviewed and approved the plan, crosswalk, logic model, and drafts of all instruments prior to implementation.



**C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.**

The evaluation used a mixed-method qualitative and quantitative approach. The use of an evaluation plan and evaluation crosswalk helped establish strong internal validity and reliability by ensuring all IMLS evaluation and report guidelines, Montana’s 2013-2017 LSTA goals<sup>7</sup>, and prior recommendations from Montana’s 2008-2012 evaluation<sup>8</sup> were identified, documented, and accounted for in both the design and implementation of the evaluation and all associated instruments and protocol. Qualitative methods included gathering all available SPRs, relevant statistical data, interviews with the State Librarian and LSTA administrator, focus groups with other MSL staff, the Network Advisory Council, State Library Commission, focus groups with Montana librarians and patrons, online surveys for staff, librarians, and patrons, and two site visits including visiting selected libraries in central and western Montana. Questions were also asked using Montana State Library’s social media but no responses were received. Thematic analysis was used to review and categorize interview and focus group responses and anonymity and confidentiality of the participants were protected and secured. Open-ended survey responses were also coded, categorized, and collapsed into common themes. See the following appendices for original instruments used: [Appendix D4 – Staff Interview/Focus Group Questions](#), [Appendix D5 – NAC and Library Commission Focus Group Questions](#), [Appendix D6 – Librarian and Patron, Interview/Focus Group Questions](#), [Appendix D7 – Montana State Library LSTA Five-Year \(2013-2017\) Survey](#).

Specific quotes were also used to supplement quantitative data and provide richer context to the findings. Quantitative methods included several levels of data analysis. The preliminary level of analysis used basic descriptive statistics including frequencies, percentages, sums, and means when analyzing SPR data and the logic model ([See Appendix E1](#)), survey responses ([See Appendix E2](#)). The second level introduced basic correlations (Pearson R coefficient) ([See Appendix E4](#)) and analysis of variance (ANOVA) to identify statistically significant relationships and differences in Montana’s public library statistics over a 10-year period and demographic trends in survey responses ([See Appendix E3](#)). Collectively, this evaluation and findings have strong internal and external validity and reliability through the use of data triangulation, which examined Montana’s progress towards attaining its 2013-2017 five-year goals using a diverse set of data, methods, and stakeholder perspectives.

**C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them.**

The evaluation’s target sampling frame focused on seeking input from major stakeholders, which included meeting with state library staff responsible for Montana’s LSTA program, their Network Advisory Committee, State Library Commission, librarians, and patrons. The total sample for the evaluation was 253 participants. This included interviews (n=5), focus groups (six focus groups, n=23), four site visits spanning five days in Montana (four different libraries were visited), and a community wide survey administered to the general public (N=161) and also mailed to a random sample (N=54). [See Appendix B](#) for full list of all evaluation participants. The State Library randomly selected 100 Montana residents from each of the Six Federations. 600 print surveys were mailed and 54 completed surveys were returned, which is a

<sup>7</sup> Montana Five-Year Plan 2013-2017, <https://www.imls.gov/sites/default/files/state-profiles/plans/montana5yearplan.pdf>

<sup>8</sup> LSTA in Montana – 2008-2012 Five-Year LSTA Evaluation, [http://msl.mt.gov/library\\_development/Grants/LSTAevaluation.pdf](http://msl.mt.gov/library_development/Grants/LSTAevaluation.pdf)

9% response rate. Random sampling allows for increased validity and reliability as the 54 responses can be considered representative of typical Montana residents.

**C-4. Discuss how you will share the key findings and recommendations with others.**

Two evaluation reports have been generated – one full report to the Montana State Library which exceeds the IMLS page limit and a smaller report submitted to IMLS within following its established guidelines and page requirements. The reports submitted to IMLS will be shared on the MSL website and widely disseminated across the state. In addition, the major results of the evaluation will also be shared using a dissemination website.

**VI. Conclusions & Recommendations**

The results of the evaluation suggest that the Montana State Library has satisfactorily achieved its four 2013-2017 LSTA goals. The evaluation had seven primary goals and five have already been addressed in this report. The two remaining goals, highlight effective practices and make recommendations for use in organizing the next five years, are addressed as part of this evaluation’s conclusions and recommendations.

**Highlight effective practices of MSL’s LSTA program**

The State Library and LSTA program has broad level support and trust from Montana’s libraries and a common theme was how satisfied they were with the ability to be able to always turn to them when they had questions. There are three effective practices the evaluation wanted to highlight: 1) **Consultants assigned to serve specific federations** – this was repeatedly lauded as a strength and represented a consistent point of contact for librarians in each respective federation. 2) **Provision of online training and State Library certification** – as online learning continues to proliferate and grow in popularity worldwide, in a state as geographically spread out as Montana, this is both economically and pedagogically sound. And, 3) **Centralized vs. competitive services and LSTA allocation** – the general ethos of Montana culture seemed a unique blend of independence and collaboration. The centralized model helps focus limited resources on the State Library’s top priorities and Montana libraries and librarians who participated in the study all stated the satisfaction with and preference towards centralized services as opposed to innovation sub-grants that many other states use. Several directors who were from other states noted how competitive sub-grants created an unintended air of competition and also disenfranchised smaller libraries who did not have the staff resources or expertise to compete against larger systems. As noted by several staff members, this allows for pilot testing so that successful programs can be brought to scale to the rest of the state.

**Recommendations**

1. Continue improving evaluation activities by developing an evaluation process aligned with the State Library’s new strategic plan and three strategic directions. Ensuring that LSTA allocations, inputs, outputs, and outcomes are meeting your long-term goals as an organization will both help with internal decision-making but also serve as opportunity for clear dialogue with internal and external stakeholders about meeting their needs.

2. Utilize a logic model as both a real-time planning and evaluation tool to ensure all LSTA allocations are identified as inputs toward, and are aligned to, specific LSTA five-year goals. This will also assist the State Library in documenting data that will be required by the new IMLS SPR system.

3. Prioritize the following IMLS Priorities (Finding 44): 1) **IMLS Priority 1** - Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills. 2) **IMLS**

**Priority 8** - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks. 3) **IMLS Priority 3** - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services. 4) **IMLS Priority 2** - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services. 5) **IMLS Priority 7** - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line.

4. Prioritize the following IMLS Measuring Success Focal Areas: **#1. Information Access (Focal Area 2)** – the demand for digital resources should only continue to grow and are particularly important in Montana because of its geography and low population density. Consider lending programs that emphasize mobile technology that is preloaded with desired digital information and/or uses prepaid cellular or satellite-based networks<sup>9</sup> for connectivity in rural areas with no traditional broadband access (e.g. tablets with prepaid set of minutes through cellular or satellite company). **#2. Civic Engagement (Focal Area 6)** - support all libraries in educating their communities about the role libraries play in today’s society and the suite of resources and services that are now available to them. The high return-on-investment libraries represent cannot be fully realized if many members of the community do not use them. In addition, 6.1 (improve users’ ability to participate in their community) was the highest ranked focal area intent; supporting tribal college libraries and helping tribal nations build closer partnerships and relationships with public libraries can serve as a nexus for increased cultural understanding, collaboration, and investment in the future that benefits everyone. **#3. Lifelong Learning (Focal Area 1)** – continue focusing on programming and other resources and services for seniors/ adults, young adults, and children. **#4. Economic & Employment Development (Focal Area 4)** – provide training, programming, and resources to support libraries in Montana communities to help them serve as community hubs and to help facilitate redefining workforces as worldwide consumption of fossil fuels continue to diminish. Technology access and the requisite digital literacy necessary to negotiate it are prerequisites to succeed in today’s workforce. While ranked #11 in the composite rankings, focus groups with library directors identified this as a high priority for most of them, which parallel the statewide economic transition from fossil fuels to other economies. **#5. Institutional Capacity (Focal Area 3)** – For libraries to best serve their communities, they must be accessible in terms of facilities, hours, well-trained staff, resources, and services. 3.2. (Improve the library’s physical and technological infrastructure) and 3.1. (Improve the library workforce) were ranked #6 and #8 in the survey composite rankings. And, **#6. Human Services (Focal Area 5)** - 5.2. (Improve users’ ability to apply information that furthers their personal or family health & wellness) and 5.3. (Improve users’ ability to apply information that furthers their parenting and family skills) were ranked #7 and #10, respectively and 5.1 (Improve users’ ability to apply information that furthers their personal, family, or household finances) is also pivotal for strengthening the overall economy.

5. Prioritize the following Focal Groups as significant funding priorities (10% or more

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<sup>9</sup> Broadband Satellite Networks by 2019, <http://www.theverge.com/2016/2/10/10958952/boeing-viasat-fast-internet-developing-countries-rural-homes>

of LSTA funding): school-aged youth, families, children, individuals with limited functional literacy, individuals with disabilities, library workforce, Ethnic or minority populations – specifically tribal members and tribal nations, and Individuals that are unemployed/underemployed.

6. Support libraries in providing robust support of information access to high priority information and entertainment sources in print and digital formats when applicable: weather, email, news (local, national, and world), smartphones (e.g. mobile apps), and information/services around outdoor leisure activities.

7. Seek to assist libraries in increasing library inputs that have been found to be correlated to quality-of-life factors at positive and statistically significant levels including: Library per capita income, Percent of registered borrowers, Weekly hours of main branch, Full-time staff with a professional MLS degree, Increasing programs and program attendance, and Increasing circulation (all types).

8. Use advanced statistical analysis centered around 10-year data trends and significant correlations and analysis of variance for each county and federation to help inform and support the positive impact local libraries are having on their respective communities and quality-of-life (similar statistics calculated at the county level).

**VII. Appendices**  
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- [Appendix A - List of acronyms](#)
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## Appendix A - List of acronyms

- ANOVA - Analysis of Variance
- BARD - Braille and Audio Reading Download
- CE - Continuing Education
- ILL - Interlibrary Loans
- KLAS - Keystone Library Automated System
- M2G - MontanaLibrary2Go
- MMP - Montana Memory Project
- MSL - Montana State Library
- MTBL - Montana Talking Book Library
- NAC – Network Advisory Council
- POP - Patron Outreach Project
- R2R - Ready2Read
- STEAM - Science, Technology, Engineering, Art, and Math
- STEM - Science, Technology, Engineering, and Math

**Appendix B - List of participants**

<b>Data Collection</b>	<b>Stakeholder</b>	<b>Date</b>	<b>Participants</b>	<b>Location</b>
Interview 1	State Librarian	6-Sep	1	State Library
Interview 2	LSTA Coordinator	6-Sep	1	State Library
Interview 3	Director of Statewide Resources	6-Sep	1	State Library
Focus Group 1	MSL Staff	6-Sep	6	State Library/Virtual
Focus Group 2	NAC	6-Sep	4	State Library
Interview 4	State Library Commission	6-Sep	1	State Library
Focus Group 3	Library Directors	25-Oct	4	State Library/Virtual
Focus Group 4	Library Directors	25-Oct	4	State Library/Virtual
Focus Group 5	Library Directors	25-Oct	4	State Library/Virtual
Site Visit 1	School Library	25-Oct	1	Helena
Interview 5	DPI	25-Oct	1	Helena
Focus Group 6	Library Directors	26-Oct	5	State Library/Virtual
Site Visit 2	Public Library	26-Oct	4	Clancy
Site Visit 3	Public Library	26-Oct	3	Boulder
Site Visit 4	Public Library	26-Oct	3	Butte
General Survey	All	12/1-1/15	161	Online
Random Survey	Patrons	12/1-1/15	54	Print mailers

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## Appendix C - Bibliography of all documents reviewed

- 10-Year Montana Public Library Statistics Table (2017). Unpublished data spreadsheet.  
Montana State Library 2012-2015 Logic Model (2017). Unpublished data spreadsheet.  
Montana State Library Federations (2017). Accessed February 1, 2017 at URL:  
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Montana State Library Priorities (2015). Accessed February 1, 2017 at URL:  
[http://docs.msl.mt.gov/Central\\_Services/Commission\\_Councils/Library\\_Development\\_Study\\_Task\\_Force/Archive/2015/11/LDTaskForceRecommendations.pdf](http://docs.msl.mt.gov/Central_Services/Commission_Councils/Library_Development_Study_Task_Force/Archive/2015/11/LDTaskForceRecommendations.pdf)  
Montana State Library SPR 2012  
Montana State Library SPR 2013  
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[http://docs.msl.mt.gov/aboutweb/documents/strategic\\_framework.pdf](http://docs.msl.mt.gov/aboutweb/documents/strategic_framework.pdf)  
Stakeholder Survey Summary (2017). LSTA Five-Year Evaluation Survey Data.  
US Census Bureau (2017). Montana vs. US Quick Facts, Accessed February 1, 2017 at URL:  
<http://www.census.gov/quickfacts/table/PST045216/30,00>



**Appendix D - Copies of any research instruments used for surveying, interviewing, and/or use of focus groups**

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[Appendix D1 – Montana LSTA Evaluation Plan](#)

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[Appendix D6 – Librarian and Patron Interview/Focus Group Questions](#)

[Appendix D7 – Montana State Library LSTA Five-Year \(2013-2017\) Survey](#)

## [Appendix D1 – Montana LSTA Evaluation Plan](#)

### **Evaluation Goals**

- 1) Highlight effective practices of MSL’s LSTA program - [lsta overview](#), [logic model](#), [data collection](#)
- 2) Utilize both statistical and qualitative evaluation methods to assess the efficiency in implementing the activities used in advancing state goals - [built into mixed methods](#); [self-assessment](#), [satisfaction ratings](#), [efficiency = accomplishing goals with maximum impact](#)
- 3) Develop key findings and recommendations from evaluating the past five years for use in organizing the next Five-Year Plan - [examine 2012 recommendations](#), [identify major findings and recommendations for this evaluation](#), [establish logic model for next five years](#)
- 4) Identify processes at work in implementing the activities in the plan, including the use of performance-based measurements in planning, policy making and administration - [detail organizational management and processes for MSL LSTA administration](#); [review annual SPRs](#); [SWOT analysis](#)
- 5) Answer Retrospective Questions:
  - A-1.
    - To what extent did your Five-Year Plan activities make progress towards each goal? [Logic model and data collection](#)
    - Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? [Logic model and data collection](#)
  - A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>10</sup> and their corresponding intents? [Logic model and data collection](#)
  - A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities? (Yes/No) [Logic model and data collection](#)
- 6) Answer Process Questions:
  - B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan? [Logic model and data collection](#)
  - B-2. Specify any changes you made to the Five-Year Plan, and why this occurred. [Data collection](#)
  - B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources? [Data collection](#)
- 7) Answer Methodology Questions
  - C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of Evaluators.

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<sup>10</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

### Evaluation report

C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.

### Evaluation report

C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them. [Crosswalk, evaluation report](#)

C-4. Discuss how you will share the key findings and recommendations with others. [Evaluation, dissemination website, data collection](#)

### Guidelines for Retrospective and Process Questions

1. Make use of administrative data on program performance. This information can be data that is reported to IMLS on the SPR or other programmatic data collected by the SLAA. [All public library data from 2013-2016 - compare non-funded vs. funded vs. quality of life factors; annual LSTA report; analysis of each annual SPR](#)
2. The administrative data will likely need to be supplemented with information collected from interviews, surveys, and/or focus groups. [Data collection](#)
3. Data also may be available from secondary documents, including contracted third-party program evaluations, studies from non-partisan entities, and any SLAA reports submitted to IMLS and state policy makers. [All evaluations and IMLS reports available.](#)
4. Other sources of information, such as Census data, state education data, and surveys conducted by the SLAA may be used to describe broad changes in communities or in the state. While these, for the most part, cannot be used for making direct attributions of outcomes from LSTA programming efforts, they can effectively describe the context of activities undertaken. [Yes, and will also run ANOVA and linear regression to seek relationships especially with state education data.](#)
5. Descriptive statistics should suffice in conducting any quantitative analysis. The mixing of summary tables and/or figures summarizing the results in the narrative is customary in this type of research. Presentation of extensive statistical output is generally reserved for appendices. [Descriptive stats, crosstabs, and advanced statistics will be included as appendices.](#)
6. A content analysis (with potential descriptive statistics for summarizing codes) is probably an acceptable method for conducting qualitative analysis. There are various types of sampling and coding strategies that will precede selecting a content analysis or other analytical choice; the independent evaluator should make these transparent in allowing you and other readers to assess the credibility of the evidence. (See below for more details on evaluation methodology and using an independent evaluator.) [Qualitative data collection of major stakeholders through interviews and focus groups; additional qualitative data collected via survey by stakeholder. Thematic encoding of transcripts and open ended comments.](#)

### Guidelines for Methodology Questions

7. The independent evaluator should clearly address these questions to your satisfaction before proceeding to collect and analyze data. *Schedule 9/2 meeting and drafts of all data collection instruments.*
8. The independent evaluator will need to carefully document project records used in the study. Professional guidelines for this type of research require protocols in place to ensure confidentiality and consent. *Private server for all data collection results; consent form for all participants*
9. In working with the independent evaluator, other stakeholders reviewing the document should have set aside appropriate time to assure that they have enough knowledge of the scientific techniques that the evaluators will be using in collecting and analyzing data, including tradeoffs that they are making given limited resources and time. *Approval from MSL team*
10. You should include a section that summarizes the methods used in any statistical and qualitative research. For qualitative research, many types of sampling and coding strategies may be appropriate; whatever gets selected should be made transparent in this section. *Yes, will be part of approval process*
11. The appendices should contain copies of any instruments used for data collection as well as those used in coding. *Copies of all instruments and coding sheet and dictionary.*

### Evaluation Crosswalk

- List all MSL goals, objectives, and activities
- List all IMLS priorities
- List all IMLS Retrospective, Process, and Methodology questions
- List Report outline sections (see full outline below): IMLS priorities, focal areas and intents (A-2), and focal groups (A-3)

### 2013-2017 Logic Model

- Situation: *SWOT analysis, general overview of MSL organization and functioning (needs assessment)*
- Priorities: *Vision, Mission, LSTA plan goals and objectives*
- Assumptions: *Support of libraries? Efficiency and effectiveness of allocation? Success of LSTA projects funded? Representativeness*
- External Factors: *Census, state priorities, state of libraries*
- MSL completes inputs, outputs, outcomes by goal, budget, and program

### Performance Data

“For the LSTA funded projects, what I would like is as much information as possible based on annually:

- What/who was funded - name, type of library, service population, and region of the state (whatever classification makes sense here - NE, NW, SE, SW, etc.)
- How much
- Type of grant
- Intended stakeholders
- The proposal and their annual reports
- Any key outputs and outcomes you have identified
- Which MST goal, objective, or activity they were aligned to
- Were they aligned with IMLS' Measuring Success Focal Area?”

- Compare funded by year
  - Descriptive stats
  - ANOVA by demographics by funding
  - Quality of life (census)
  - Educational data (k-12)
- Compare with non-funded by year
- Linear Regression (compare input, output, and outcome variables)

### Sample

The desired sample will include:

- All LSTA staff of the MSL
  - Interviews with Cara and State Librarian (Jennie) and Director of Statewide Library Resources (Tracy)
  - Focus group with remaining staff (LSTA-funded projects and positions)
    - Christie Briggs, Montana Talking Book Library Director
    - Jo Flick, Statewide Trainer & Continuing Education Coordinator
    - Jessie Goodwin, Montana Shared Catalog Director
    - Sara Groves, Lifelong Learning Librarian
    - Pam Henley, Statewide Consulting Librarian
    - Suzanne Reymer, Statewide Consulting Librarian
- A purposeful (specifically selected to ensure they are included in the sample) and stratified (different types are selected to ensure representation) sample of libraries
  - Public
  - Academic
  - School
  - Special
  - Tribal
  - Urban/Rural
  - Patron Demographics
  - Funded vs. Non-funded
- Librarians and library administrators:
  - All funded
  - Focus group of random/stratified (2 per type of library per year - 1 random, 1 top)  
“Why don't you select two per year per type of stakeholder served for 2013, 2014, 2015, and 2016.

This should give us 8 members per type of focus group. 1 should be randomly selected and 1 can be hand picked as a top/model program.”

- Public library (2 focus groups?) - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
  - Academic library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
  - School library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
  - Special library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
- Purposeful and stratified sample of patrons
    - All funded (emailed survey link)
    - Random sample focus groups based on type of library: 2 recipients per year - 1 random and 1 top/model program
      - Public library (2 focus groups?) - 1 random, 1 top per year (2013, 2014,

2015, and 2016)

- Academic library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
  - School library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
  - Special library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
- Random sample of patrons (e.g. representative of the state's racial, ethnic, and socioeconomic demographics).
    - Needs assessment? Value of libraries? Do they use libraries?

### *Instrumentation & Data Analysis*

#### **Interviews**

- MSL administration
  - Context, process, SWOT analysis, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes

#### **Focus groups**

- MSL staff
  - Context, process, SWOT analysis, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes
- State commission members (three to four)
  - Context, process, SWOT analysis, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes
- Librarians and administrators
  - Impact of LSTA funding, impact on stakeholders, logic model elements
  - Responses coded by theme and organized by question; presented as common themes and quotes
- Patrons
  - Impact of LSTA funding, impact on stakeholders, logic model elements
  - Responses coded by theme and organized by question; presented as common themes and quotes

#### **Surveys** - draft is at <https://www.surveymonkey.com/results/SM-SQMQN8DM/>

- All LSTA MSL Staff
  - Quantitative ratings on: process, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes
  - Descriptive statistics
  - ANOVA for each goal and objective (are staff more satisfied with progress on a particular goal or objective)
- LSTA funded librarians and administrators

- Quantitative ratings on: Impact of LSTA funding, impact on stakeholders, logic model elements; satisfaction, open ended comments
  - Responses coded by theme and organized by question; presented as common themes and quotes
  - Descriptive statistics
  - Correlation - progress/satisfaction by demographic factor
  - ANOVA for each goal and objective (are staff more satisfied with progress on a particular goal or objective) - progress/satisfaction by demographic factor
  - Linear Regression - progress/satisfaction by multiple factors
- All librarians and administrators
    - Quantitative ratings on: Impact of LSTA funding and/or funded projects, impact on stakeholders, logic model elements; current and future needs, satisfaction, open ended comments
    - Responses coded by theme and organized by question; presented as common themes and quotes
    - Descriptive statistics
    - Correlation - progress/satisfaction by demographic factor
    - ANOVA for each goal and objective (are staff more satisfied with progress on a particular goal or objective) - progress/satisfaction by demographic factor
    - Linear Regression - progress/satisfaction by multiple factors
    - Funded vs. Non-funded

Appendix D2 – Montana LSTA Evaluation Crosswalk

High Priority Goals	Data	Interviews	Interview Questions	Focus Groups	Survey	Survey Questions	Social Media	Data Analytics
<b>Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.</b>	Reports and logic model	MSL, librarian, administrators, patrons	Q4	MSL staff, trustees, librarians	MSL staff, librarians, patrons	Q2		
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q2		
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q3		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q4		
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q5		



<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q6</p>		
<p>1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q7</p>		
<p><b>Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.</b></p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>	<p>MSL staff, trustees, librarians</p>	<p>MSL staff, librarians and administrators</p>	<p>Q8</p>		
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q8</p>		
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q9</p>		

provide high-quality digitization equipment for libraries to use.								
2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q10		
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q11		
2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q12		
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q13		

<p><b>Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.</b></p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>	<p>MSL staff, trustees, librarians</p>	<p>MSL staff, librarians and administrators</p>	<p>Q14</p>		
<p>3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q14</p>		
<p>3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q15</p>		
<p>3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q16</p>		
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q17</p>		
<p>3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q18</p>		

partnerships between courier services and libraries. (see goal #2, program 36 above)								
3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q19		
<b>Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.</b>	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q20		
4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q20		

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4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q21		
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q22		
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q23		
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q24		
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q25		
Were any Goals Not Met?	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26		
<b>IMLS LSTA-specified Grants to States Priorities (20 U.S.C. § 9141)</b>								
1. Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals'	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q27		

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needs for education, lifelong learning, workforce development, and digital literacy skills;								
2. Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q28		
3. Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q29		
4. Enhance efforts to recruit future professionals to the field of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q30		
5. Develop public and private partnerships with other agencies and community-based organizations;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q31		
6. Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q32		
7. Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q33		
8. Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q34		

9. Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q35		
<b>Measuring Success Focal Areas and Intents</b>								
1. Lifelong Learning	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.1. Improve users' formal education	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.2. Improve users' general knowledge and skills	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
2. Information Access	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.1. Improve users' ability to discover information resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.2. Improve users' ability to obtain and/or use information resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
3. Institutional Capacity	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.1. Improve the library workforce	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		

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3.2. Improve the library's physical and technological infrastructure	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.3. Improve library operations	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
4. Economic & Employment Development	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.1. Improve users' ability to use resources and apply information for employment support	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.2. Improve users' ability to use and apply business resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
5. Human Services	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.3. Improve users' ability to apply information that furthers their parenting and family skills	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		



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6. Civic Engagement	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.1. Improve users' ability to participate in their community	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.2. Improve users' ability to participate in community conversations around topics of concern.	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
<b>2012 evaluation recommendations</b>								
1. MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.		MSL staff	Q11a	MSL staff, trustees, librarians	MSL staff	Q48		
2. MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.		MSL staff	Q11b	MSL staff, trustees, librarians	MSL staff	Q49		
3. MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.		MSL staff	Q11c	MSL staff, trustees, librarians	MSL staff	Q50		
4. The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group. Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless		MSL staff	Q11d	MSL staff, trustees, librarians	MSL staff	Q51		

transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.								
5. MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.		MSL staff	Q11e	MSL staff, trustees, librarians	MSL staff	Q52		
<b>IMLS Retrospective, Process, and Methodology Questions</b>								
A-1 To what extent did your Five-Year Plan activities make progress towards each goal? Logic model and data collection		MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q2-Q25		
A-1 Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?		MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26		
A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents? Logic model and data collection		MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q36-Q41		
A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities? (Yes/No) Logic model and data collection		MSL staff	Q6	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q42		
Answer Process Questions:								
B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan? Logic model and data collection		MSL staff	Q7	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q45		
B-2. Specify any changes you made to the Five-Year Plan, and why this occurred. Data collection		MSL staff	Q8	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q46		
B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources? Data collection		MSL staff	Q9	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q47		
Answer Methodology Questions								
C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance			Evaluation Report					

document called Selection of Evaluators. Evaluation report								
C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.			Evaluation Report					
C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them. Crosswalk, evaluation report			Evaluation Report					
C-4. Discuss how you will share the key findings and recommendations with others. Evaluation, dissemination website, data collection			Evaluation Report					
<b>Logic Model</b>								
Situation (assets, problems, and engagement)		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
Priorities (guiding strategic plan)		MSL staff	Q2	MSL staff, trustees, librarians				
Assumptions		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
External Factors		MSL staff	Q1, Q3	MSL staff, trustees, librarians, patrons				

[Appendix D3 – Montana LSTA Evaluation Logic Model](#)

High Priority Goals	Year	Budget	Inputs	Outputs		Outcomes	Rating (Scale of 1-10, 1=lowest attainment, 10=highest attainment)	Comments
Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.				Activities	Frequency		Average of ratings for all Goal 1 objectives.	
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.								
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.								
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training								
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.								
1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and								

<p>promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>								
<p>1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.</p>								
<p>Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.</p>								
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>								
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>								
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>								

<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>										
<p>2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.</p>										
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>										
<p>Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL’s number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.</p>										
<p>3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.</p>										
<p>3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]</p>										
<p>3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of</p>										

digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.										
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.										
3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)										
3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.										
<b>Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and</b>										

<b>training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.</b>								
4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.								
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.								
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.								
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.								
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.								
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.								



[Appendix D4 –Staff Interview/Focus Group Questions](#)

**State Library Staff Interview Questions**

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)

How has this changed from the past five-year 2008-2012 LSTA plan?

3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1) - **See Program to Activity Crosswalk**
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and

collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
  - 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>11</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of concern.

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?

- 8. Library workforce (current and future)
- 9. Individuals living below the poverty line

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<sup>11</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

10. Individuals that are unemployed/underemployed
11. Ethnic or minority populations
12. Immigrants/refugees
13. Individuals with disabilities
14. Individuals with limited functional literacy or information skills
15. Families
16. Children (aged 0-5)
17. School-aged youth (aged 6-17)

**Process Questions:**

18. B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?
19. B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.
20. B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?
21. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:
  - a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
  - b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
  - c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
  - d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audiobooks*

*(cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation's population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

## 22. Ongoing Evaluation per the Five-Year Plan

### **Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

1. "Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level."
2. "While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews."
3. "The following evaluation period should include an analysis of MSC in both urban and rural libraries."

"Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC's input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.



Appendix D5 – NAC and Library Commission Focus Group Questions

**State Library Commission/NAC Focus Group Questions**

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)
  - 2-a. How would you, as a NAC [or Commission] representative, describe your role in the LSTA planning, policy making, and administration process?
  - 2-b. What part of the process helps you to serve in this role?
  - 2-c. What part of the process should be improved to help you serve in this role?
3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the

information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

- a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)
5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
- 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State**



**Goal 2: acquire and manage content; provide access)**

- 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
- 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>12</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of

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<sup>12</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

concern.

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)

8. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:

- a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
- b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
- c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
- d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences,*

*physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation’s population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

## 9. Ongoing Evaluation per the Five-Year Plan

### **Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

4. “Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level.”
5. “While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews.”
6. “The following evaluation period should include an analysis of MSC in both urban and rural libraries.”

“Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC’s input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.”

[Appendix D6 – Librarian and Patron Interview/Focus Group Questions](#)

### Librarian Focus Group Questions

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, ease-of-use and interaction, etc.
3. What are the State Library's strengths and opportunities? Do they use performance-based measurements in planning, policy making and administration?
4. To what extent, do you feel the State Library met the following goals in support of Montana's libraries and patrons?
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017*

*period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. To what extent do you feel the State Library has met these priorities and do you feel these should be the same priorities for 2018-2022?
- 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent do you feel the State Library met the following associated with the Measuring Success focal areas<sup>13</sup> national priorities? Which do you feel should be priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of concern.

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<sup>13</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

7. A-3. Did any of the following groups represent a substantial focus for the State Library (Yes/No)? Which should be the primary focus over the next five years (2018-2022)?

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)

8. Any other thoughts or comments about what the State Library needs to focus on over the next five years?

[Appendix D7 – Montana State Library LSTA Five-Year \(2013-2017\) Survey](#)

Insert PDF or link to PDF



[Appendix E - Optional output of statistical findings](#)

Pending

[Appendix F - Optional summaries of coding used in any qualitative analyses](#)

Pending

## Five-Year Evaluation Report Outline

IMLS-CLR-D-0019

Documents required for the Five-Year Evaluation include a cover page (1 page), evaluation summary (2-5 pages), evaluation report (25 pages, max.), and appendices. Please follow the format specified below:

### Cover Page (1 page)

- State Library Administrative Agency
- Title of the evaluation
- Evaluator(s) name and organizational affiliation
- Date
- Name of the team, branch, unit, or person commissioning the evaluation

### Evaluation Summary (2-5 pages)

- Summarize key findings for the three retrospective and three process questions below
- Briefly describe the evaluation methodology, referencing the four methodology questions below

### Evaluation Report (25 pages, max.)

- Answer the first six questions under A. Retrospective and B. Process in order, and numbered as they are below.
- Describe the methodology employed, responding to the four questions under C. Methodology, below.

#### A. Retrospective Questions

A-1. To what extent did your Five-Year Plan activities make progress towards each goal? Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?

- Organize findings around each goal of the state's 2013-2017 Five-Year Plan
- Categorize each goal as either 1) achieved, 2) partly achieved, or 3) not achieved

A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?

Measuring Success Focal Areas and Intents

- Lifelong Learning
  - Improve users' formal education
  - Improve users' general knowledge and skills
- Information Access
  - Improve users' ability to discover information resources
  - Improve users' ability to obtain and/or use information resources
- Institutional Capacity
  - Improve the library workforce
  - Improve the library's physical and technological infrastructure

- Improve library operations
- Economic & Employment Development
- Improve users' ability to use resources and apply information for employment support
- Improve users' ability to use and apply business resources
- Human Services
- Improve users' ability to apply information that furthers their personal, family, or household finances
- Improve users' ability to apply information that furthers their personal or family health & wellness
- Improve users' ability to apply information that furthers their parenting and family skills
- Civic Engagement
- Improve users' ability to participate in their community
- Improve users' ability to participate in community conversations around topics of concern.

A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities? (Yes/No)

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)
- For the purposes of this question, a substantial focus would represent at least ten percent of the total amount of resources committed by the overall plan across multiple years.
- For those who answer Yes to any of the above groups, please discuss to what extent each group was reached.

### **B. Process Questions**

B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?

B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.

B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?

### **C. Methodology Questions**

C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of Evaluators.

C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.

C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them.

C-4. Discuss how you will share the key findings and recommendations with others.

### **Appendices**

- List of acronyms
- List of people interviewed
- Bibliography of all documents reviewed
- Copies of any research instruments used for surveying, interviewing, and/or use of focus groups
- Optional output of statistical findings
- Optional summaries of coding used in any qualitative analyses

### **IMLS LSTA-specified Grants to States Priorities (20 U.S.C. § 9141)**

- Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills;
- Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services;
- Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services;
- Enhance efforts to recruit future professionals to the field of library and information services;
- Develop public and private partnerships with other agencies and community-based organizations;
- Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills;
- Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved;
- Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
- Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

**Appendix D2 – Montana LSTA Evaluation Crosswalk**

<b>High Priority Goals</b>	<b>Data</b>	<b>Interviews</b>	<b>Interview Questions</b>	<b>Focus Groups</b>	<b>Survey</b>	<b>Survey Questions</b>	<b>Social Media</b>	<b>Data Analytics</b>
<b>Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.</b>	Reports and logic model	MSL, librarian, administrators, patrons	Q4	MSL staff, trustees, librarians	MSL staff, librarians, patrons	Q2		
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q2		
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q3		

library leaders with these efforts.								
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q4		
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q5		
1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q6		



accessing online training								
1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q7		
<b>Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.</b>	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q8		
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q8		

<p>used to purchase new products for pilot projects designed to determine use and value.</p>								
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q9</p>		
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q10</p>		

also be applied to costs for statewide licenses and to add additional catalogs and other resources.								
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q11		
2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q12		
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q13		

<p>options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>								
<p><b>Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.</b></p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>	<p>MSL staff, trustees, librarians</p>	<p>MSL staff, librarians and administrators</p>	<p>Q14</p>		
<p>3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q14</p>		
<p>3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q15</p>		

and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]								
3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q16		
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q17		
3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q18		

<p>partnerships between courier services and libraries. (see goal #2, program 36 above)</p>								
<p>3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q19</p>		
<p><b>Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal</b></p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>	<p>MSL staff, trustees, librarians</p>	<p>MSL staff, librarians and administrators</p>	<p>Q20</p>		

<p><b>for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.</b></p>								
<p>4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q20</p>		
<p>4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q21</p>		
<p>4.3. Continue to update Keystone Library Automated</p>	<p>Reports and</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and</p>	<p>Q22</p>		

System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	logic model				administrators			
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q23		
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q24		
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q25		



materials about the MTBL program.								
Were any Goals Not Met?	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26		
<b>IMLS LSTA-specified Grants to States Priorities (20 U.S.C. § 9141)</b>								
1. Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q27		
2. Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q28		
3. Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q29		
4. Enhance efforts to recruit future professionals to the field of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q30		

5. Develop public and private partnerships with other agencies and community-based organizations;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q31		
6. Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q32		
7. Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q33		
8. Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q34		
9. Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q35		

Measuring Success Focal Areas and Intents								
1. Lifelong Learning	Reports , logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees , librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.1. Improve users' formal education	Reports , logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees , librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.2. Improve users' general knowledge and skills	Reports , logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees , librarians	MSL staff, librarians and administrators, and patrons	Q36		
2. Information Access	Reports , logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees , librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.1. Improve users' ability to discover information resources	Reports , logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees , librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.2. Improve users' ability to obtain and/or use information resources	Reports , logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees , librarians	MSL staff, librarians and administrators, and patrons	Q37		
3. Institutional Capacity	Reports , logic model, and program	MSL staff	Q5	MSL staff, trustees , librarians	MSL staff, librarians and administrators, and patrons	Q38		

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	crosswalk							
3.1. Improve the library workforce	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.2. Improve the library's physical and technological infrastructure	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.3. Improve library operations	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
4. Economic & Employment Development	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.1. Improve users' ability to use resources and apply information for employment support	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.2. Improve users' ability to use and apply business resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
5. Human Services	Reports, logic model, and program	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		

	crosswalk							
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.3. Improve users' ability to apply information that furthers their parenting and family skills	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
6. Civic Engagement	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.1. Improve users' ability to participate in their community	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.2. Improve users' ability to participate in community conversations around topics of concern.	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
<b>2012 evaluation recommendations</b>								
1. MSL should use evaluation data (including complete data beyond what is		MSL staff	Q11a	MSL staff, trustees,	MSL staff	Q48		

listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.				librarians				
2. MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.		MSL staff	Q11b	MSL staff, trustees, librarians	MSL staff	Q49		
3. MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.		MSL staff	Q11c	MSL staff, trustees, librarians	MSL staff	Q50		
4. The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group. Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means		MSL staff	Q11d	MSL staff, trustees, librarians	MSL staff	Q51		

many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.								
5. MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.		MSL staff	Q11e	MSL staff, trustees, librarians	MSL staff	Q52		
<b>IMLS Retrospective, Process, and Methodology Questions</b>								
A-1 To what extent did your Five-Year Plan activities make progress towards each goal? Logic model and data collection		MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q2-Q25		
A-1 Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?		MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26		
A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents? Logic model and data collection		MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q36-Q41		
A-3. Did any of the following groups represent a		MSL staff	Q6	MSL staff, trustees	MSL staff, librarians and	Q42		

substantial focus for your Five-Year Plan activities? (Yes/No) Logic model and data collection				librarians	administrators			
Answer Process Questions:								
B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan? Logic model and data collection		MSL staff	Q7	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q45		
B-2. Specify any changes you made to the Five-Year Plan, and why this occurred. Data collection		MSL staff	Q8	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q46		
B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources? Data collection		MSL staff	Q9	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q47		
Answer Methodology Questions								
C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of Evaluators. Evaluation report			Evaluation Report					
C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.			Evaluation Report					



C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them. Crosswalk, evaluation report			Evaluati on Report					
C-4. Discuss how you will share the key findings and recommendations with others. Evaluation, dissemination website, data collection			Evaluati on Report					
<b>Logic Model</b>								
Situation (assets, problems, and engagement)		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
Priorities (guiding strategic plan)		MSL staff	Q2	MSL staff, trustees, librarians				
Assumptions		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
External Factors		MSL staff	Q1, Q3	MSL staff, trustees, librarians, patrons				

## Appendix D3 – Montana LSTA Evaluation Logic Model

- [See Completed 2013-2015 Montana Logic Model](#)

## Appendix D4 –Staff Interview/Focus Group Questions

### State Library Staff Interview Questions

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)  
  
How has this changed from the past five-year 2008-2012 LSTA plan?
3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1) - **See Program to Activity Crosswalk**
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and

collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
  - 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>14</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of concern.

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?

- 23. Library workforce (current and future)
- 24. Individuals living below the poverty line
- 25. Individuals that are unemployed/underemployed
- 26. Ethnic or minority populations

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<sup>14</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

27. Immigrants/refugees
28. Individuals with disabilities
29. Individuals with limited functional literacy or information skills
30. Families
31. Children (aged 0-5)
32. School-aged youth (aged 6-17)

**Process Questions:**

8. B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?
9. B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.
10. B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?
11. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:
  - a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
  - b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
  - c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
  - d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audiobooks (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to*

*embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation's population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

#### Ongoing Evaluation per the Five-Year Plan

##### **Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

1. "Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level."
2. "While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews."
3. "The following evaluation period should include an analysis of MSC in both urban and rural libraries."

"Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC's input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.

**Appendix D5 – NAC and Library Commission Focus Group Questions**  
**State Library Commission/NAC Focus Group Questions**

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)
  - 2-a. How would you, as a NAC [or Commission] representative, describe your role in the LSTA planning, policy making, and administration process?
  - 2-b. What part of the process helps you to serve in this role?
  - 2-c. What part of the process should be improved to help you serve in this role?
3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the*



*number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

- a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)
5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
- 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (MSL State Goal 1: consultation, leadership, training)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local,

state, regional, national, and international collaborations and networks; and

- 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.
- 
6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>15</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?
    - 1. Lifelong Learning (MSL Goal 3)**
      - 1.1. Improve users' formal education
      - 1.2. Improve users' general knowledge and skills
    - 2. Information Access (MSL Goals 2, 3, 4)**
      - 2.1. Improve users' ability to discover information resources
      - 2.2. Improve users' ability to obtain and/or use information resources
    - 3. Institutional Capacity (MSL Goals 1, 3)**
      - 3.1. Improve the library workforce
      - 3.2. Improve the library's physical and technological infrastructure
      - 3.3. Improve library operations
    - 4. Economic & Employment Development**
      - 4.1. Improve users' ability to use resources and apply information for employment support
      - 4.2. Improve users' ability to use and apply business resources
    - 5. Human Services**
      - 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
      - 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
      - 5.3. Improve users' ability to apply information that furthers their parenting and family skills
    - 6. Civic Engagement**
      - 6.1. Improve users' ability to participate in their community
      - 6.2. Improve users' ability to participate in community conversations around topics of concern.

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<sup>15</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)

8. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:

- a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
- b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
- c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
- d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse,*

*and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation's population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

#### 9. Ongoing Evaluation per the Five-Year Plan

##### **Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

1. "Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level."
2. "While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews."
3. "The following evaluation period should include an analysis of MSC in both urban and rural libraries."

"Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC's input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan."

#### [Appendix D6 – Librarian and Patron Interview/Focus Group Questions](#)

##### **Librarian Focus Group Questions**

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, ease-of-use and interaction, etc.
3. What are the State Library's strengths and opportunities? Do they use performance-based measurements in planning, policy making and administration?
4. To what extent, do you feel the State Library met the following goals in support of Montana's libraries and patrons?
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9.

To what extent do you feel the State Library has met these priorities and do you feel these should be the same priorities for 2018-2022?

- 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
- 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
- 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
- 4) Enhance efforts to recruit future professionals to the field of library and information services;
- 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
- 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
- 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
- 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
- 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent do you feel the State Library met the following associated with the Measuring Success focal areas<sup>16</sup> national priorities? Which do you feel should be priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of concern.

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<sup>16</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

7. A-3. Did any of the following groups represent a substantial focus for the State Library (Yes/No)? Which should be the primary focus over the next five years (2018-2022)?

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)

8. Any other thoughts or comments about what the State Library needs to focus on over the next five years?



**Appendix D7 – Montana State Library LSTA Five-Year (2013-2017) Survey**  
**Montana State Library Five-Year LSTA Evaluation Survey**

As a requirement of the Institute of Museum and Library Services (IMLS) funding of the Library Services and Technology Act (LSTA), each state must conduct an evaluation of its five-year plan. The primary purpose of this evaluation is to understand the progress made towards the Montana State Library's high priority goals as identified in our 2013-2017 LSTA Five-Year Plan. Another equally important goal, however, is to understand the current and future needs of our great state and in what ways can your State Library align itself in helping meet these needs in a new five-year plan (2018-2022).

You can also complete this survey online at <https://www.surveymonkey.com/r/msllstarandomsurvey>

**Please complete the survey no later than December 31, 2016.**

**1. How important are the following INFORMATION sources in your daily life?**

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone over the Internet (Skype, Gmail talk, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
National news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Movie reviews	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
World news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General website surfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weather	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone/Cell phone Telephone Calls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone/Cell phone Texting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social Media in General (e.g. Youtube, Instagram, LinkedIn, Snapchat, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

2. How important are the following these additional INFORMATION sources in your daily life?

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bloggging in general	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Video conferencing (Skype, Google Video, Facetime, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hunting/Fishing Reports and Forecasts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet Computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laptop Computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chromebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Desktop Computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

3. How important are the following sources of ENTERTAINMENT in your daily life?

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Redbox	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
National news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies via DVD	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
YouTube videos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone/Cellphone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Netflix	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies on the Internet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leisure reading	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies on TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone web browsing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone texting/instant messaging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

**4. How important are these additional sources of ENTERTAINMENT in your daily life?**

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Playing traditional games (e.g. board games, cards, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching / Reading about sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General website surfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Video conferencing (Skype, Google Video, Facetime, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Listening to music on the Internet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Movie reviews	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone listening to music/podcasts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone playing games/using apps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Amazon Prime or Other Internet Streaming Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attending community events (sports, theater, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone over the Internet (Skype, Gmail talk, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies at the theater	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching TV in general	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exercising/playing sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone Talking on the Phone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone watching TV/videos/Movies, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor leisure activities (bicycling, horseback riding, skiing, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**5. What do you believe are the three most important resources, programs, or services the Library should provide to benefit you and the community?**

*Priority 1:*  
*Priority 2:*  
*Priority 3:*

**6. Think about the past 12 months. In a typical month, approximately how many times would you say you have visited or used, including online, a library?**

- Less than once a month
- 1 visit
- 2 visits
- 3-4 visits
- 5 or more visits
- Not at all

Please elaborate on your selection, especially if you do not use the Library (why?) or use it infrequently:

**7. On average, how long does it take you to arrive at the library you use most frequently?**

- 0-5 minutes
- 5-10 minutes
- 10-15 minutes
- 15-20 minutes
- 20-25 minutes
- 25-30 minutes
- 30+ minutes

**8. Please rate the importance of the following library services to you over the past 12 months:**

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Checking out printed books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Checking out audio books or music on CDs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Checking out movies on DVDs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downloading eBooks, music, or eAudio books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downloading Audio books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using reference materials, newspapers, magazines, or other periodicals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs or services designed for children 5 and under	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help with homework for school aged children or teens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library Wi-Fi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff help with your computer or other digital device	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Computer or Internet training classes or workshops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library Website (e.g. to search for materials, place materials on hold, renew materials, use research resources, or manage your account online).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs or services to help find a job or create a resume	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to read	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to work or study	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to socialize and attend community events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To use public meeting rooms for any purpose, including voting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

9. To what extent do you feel the following national library priorities should represent a substantial focus of Montana's libraries over the next five years?

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhance efforts to recruit future professionals to the field of library and information services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop public and private partnerships with other agencies and community-based organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

10. Which of the following national library priority areas should be a priority for Montana's libraries in serving library patrons over the next five years?

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
1. Lifelong Learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.1. Improve users' formal education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.2. Improve users' general knowledge and skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Information Access	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.1. Improve users' ability to discover information resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.2. Improve users' ability to obtain and/or use information resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Institutional Capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.1. Improve the library workforce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.2. Improve the library's physical and technological infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3.3. Improve library operations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>4. Economic &amp; Employment Development</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.1. Improve users' ability to use resources and apply information for employment support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.2. Improve users' ability to use and apply business resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>5. Human Services</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.3. Improve users' ability to apply information that furthers their parenting and family skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>6. Civic Engagement</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6.1. Improve users' ability to participate in their community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6.2. Improve users' ability to participate in community conversations around topics of concern.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**11. To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?**

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
Library workforce (current and future)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals living below the poverty line	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals that are unemployed/underemployed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ethnic or minority populations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Immigrants/refugees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals with disabilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals with limited functional literacy or information skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Families	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children (aged 0-5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School-aged youth (aged 6-17)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**Demographic Information**

12. Please tell us your gender:

- Female  Male

13. Please tell us your race and check all that apply:

- White  White (Spanish/Hispanic/Latino)  Black  American Indian or Alaskan Native  Asian  
 Native Hawaiian or Other Pacific Islander  Other (please specify):

14. Please tell us your age range:

- 17 or Under  18-24  25-34  35-44  45-54  55-64  65+

15. What is the major language spoken in your home?

- English  Spanish  Native American (please specify tribal language) or Other (please specify):

16. Your education (highest degree earned):

- |  |   |
|--|---|
| <input type="radio"/> Some high school                             | <input type="radio"/> Bachelor's Degree |
| <input type="radio"/> High School Diploma                          | <input type="radio"/> Master's Degree   |
| <input type="radio"/> Associate of Arts (2-year community college) | <input type="radio"/> Ph.D./Ed.D.       |
| <input type="radio"/> Technical Certificate                        | <input type="radio"/> JD / MD           |

17. Your Combined Household Income:

- 0-\$25,000  \$25,000-\$50,000  \$50,000-\$75,000  \$75,000-\$100,000  \$100,000+

18. Do you have a computing device (computer, laptop, and/or Tablet) at home?

- Yes  No

19. Do you have access to the Internet at home, and, if so, through what device(s)? (check all that apply)

- No, I do not have access to the Internet  Laptop  Desktop  Tablet  Chromebook  
 Cellphone (no web browsing)  Smartphone  Other (please specify):

20. On a daily basis, how often do you use the following resources for accessing information?

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
Print newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Print magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Radio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laptop computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Desktop computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet PC (e.g. Surface, iPad Air, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cellphone (no web browsing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone web browsing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Smartphone mobile apps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social Media (e.g. Facebook, Twitter, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Computer instant messaging (e.g. Google Hangout, Facebook, Twitter, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone instant messaging (e.g. Instant messaging, Google Hangout, Facebook, Twitter, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone texting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone (wired or cell)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

21. We greatly thank you for taking the time to complete our survey. Please let us know if you have any other thoughts or comments on how the State Library has progressed over the past five years OR what you feel we should focus on in the next Five Year 2018-2022 strategic plan.

All completed surveys with a name and contact information will be entered into a drawing to win an iPad Mini 2 or one of three \$20 Starbucks gift cards.

Name (optional):  
 Phone Number (optional):  
 Email Address (optional):

Thank you so much for your participation in this survey!



**Appendix E –  
E1 – Logic Model Summary Tables**

Administrative costs for managing LSTA award

LSTA Goals	FY2012	%	FY2013	%	FY2014	%	FY2015	%	Total	%
Goal 1	\$313,782.07	31%	\$339,356.24	35%	\$354,507.33	36%	\$316,942.52	32%	\$1,324,588.16	33%
Goal 2	\$476,794.96	47%	\$377,464.87	39%	\$416,420.99	42%	\$447,388.31	45%	\$1,718,069.13	43%
Goal 3	\$25,157.00	2%	\$52,303.02	5%	\$20,681.00	2%	\$48,568.52	5%	\$146,709.54	4%
Goal 4	\$194,500.02	19%	\$199,362.00	21%	\$199,362.00	20%	\$174,652.10	18%	\$767,876.12	19%
<b>TOTAL</b>	<b>\$1,010,234.05</b>		<b>\$968,486.13</b>		<b>\$990,971.32</b>		<b>\$987,551.45</b>		<b>\$3,957,242.95</b>	

Administrative costs for managing LSTA award					
LSTA Goals	FY2012	FY2013	FY2014	FY2015	Total
Goal 1	\$313,782.07	\$339,356.24	\$354,507.33	\$316,942.52	\$1,324,588.16
Goal 2	\$476,794.96	\$377,464.87	\$416,420.99	\$447,388.31	\$1,718,069.13
Goal 3	\$25,157.00	\$52,303.02	\$20,681.00	\$48,568.52	\$146,709.54
Goal 4	\$194,500.02	\$199,362.00	\$199,362.00	\$174,652.10	\$767,876.12
<b>TOTAL</b>	<b>\$1,010,234.05</b>	<b>\$968,486.13</b>	<b>\$990,971.32</b>	<b>\$987,551.45</b>	<b>\$3,957,242.95</b>

**Goal Outputs**

Activity	2012	2013	2014	2015	Total
Site Visits	412	122	135		669
E-Rate Consultations	220	60	54	51	385
Information requests from public library staff	1712	330	494	282	2818
Consultant led training (in-person and virtual)	189	50	22	52	313
Attendance at training sessions	2274	859	286	416	3835
Technology Petting Zoos (TPZ)					
Activity	2012	2013	2014	2015	Total
E-Rate Savings	\$80,000.00	\$82,800.00	\$92,000.00	\$135,357.28	\$390,157.28
Activity	2012	2013	2014	2015	Total
Fall Training Workshops	53	21		12	86
Workshop Attendees	561	160		140	861
Trustee Training Hours	21	9	12	12	54
Trustee Attendees	335	34	116	64	549
Activity/Output	2012	2013	2014	2015	Total
Online Training Hours	292		81	59	432
GoToMeeting Licenses		82			82
Certifications	309	80	63	86	538
Number of webinars available on the MSL Vimeo channel		69			69
Activity/Output	2012	2013	2014	2015	Total
MontanaLibrary2Go Circulation (e-resources)	2,641,906	607,637	749,996	862,563	4,862,102
MontanaLibrary2Go New Patrons	60,064	16,921	12,305	13,207	102,497

Montana State Library LSTA Evaluation Report (2013-2017)

New items added to MontanaLibrary2Go	26,675	4,458	8,154	7,510	46,797
Total items available in MontanaLibrary2Go	20,314	22,539	30,693		
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Montana Memory Project (MMP) Training Presentations	165	46	56	53	320
Attendees	1670	412	840	318	3,240
MMP Outreach Visits		38	26	22	86
Digital Collections Improved	1	78			79
New Collections Added	9	9	25	4	47
Number of collections hosted on MMP website	178	78	103	48	407
Contributing Institutions	161	38	45	48	292
Number of images hosted on site	2,069,128	254,762	860,164	707,964	3,892,018
Number of images added		254,762	104,402		359,164
Website Visits		124,769	174,430		299,199
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
EBSCO Discovery Service for all Montana libraries	800	800	800	800	3,200
Training Sessions	40	13			53
Training Attendees	329	117			446
Search Statistics	202,147	69,069	76,508		347,724
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Montana Shared Catalog Allocations	\$181,310.00	\$172,150	\$176,254	\$184,912.62	\$714,626.62
Help Requests	33,780	17,000	1,890	1,890	54,560
Training Sessions Offered	130	44	15	34	223
Attendees	1427	423	182	442	2,474
Number of Libraries Added to MSC	38	3	2	7	50
Startup and data migration fees	\$54,850.16	\$16,344	\$1,900	\$39,667.00	\$112,761.16
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Offset costs to participating libraries for access to OCLC cataloging, interlibrary loan, and authentication tools	\$59,736.00	\$62,277	\$89,741	\$75,380.00	\$287,134.00
Number of libraries enrolled to receive discounted access to OCLC Group Services	1045	251	272	273	1,841
Number of original catalog records added to WorldCat	8,336	3,140	2,933	2,000	16,409
Number of copy catalog records updated in WorldCat	466,590	78,980	89,023	209,155	843,748
Number of ILL requests filled (borrowing)	53,071	49,758	46,859	44,099	193,787
Number of ILL requests filled (lending)	194,449	50,420	50,201	50,000	345,070
Courier Project	\$16,334.00				\$ 16,334.00
startup costs for joining the courier service	\$10,372.68		\$7,839	\$5,765.50	\$ 23,977.18
Number of libraries that received this discount	43		19	18	80
Number of items circulating via courier per month	17,060		685	16,265	34,010
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Cost of early literacy staff hours	\$10,000.00	\$10,000.00	\$10,000.00	\$28,675.90	\$ 58,675.90
Number of Ready2Read training events offered:	12				12
Number of Ready2Read training (online and in-person sessions, excluding the Rendezvous) attendees	479				479

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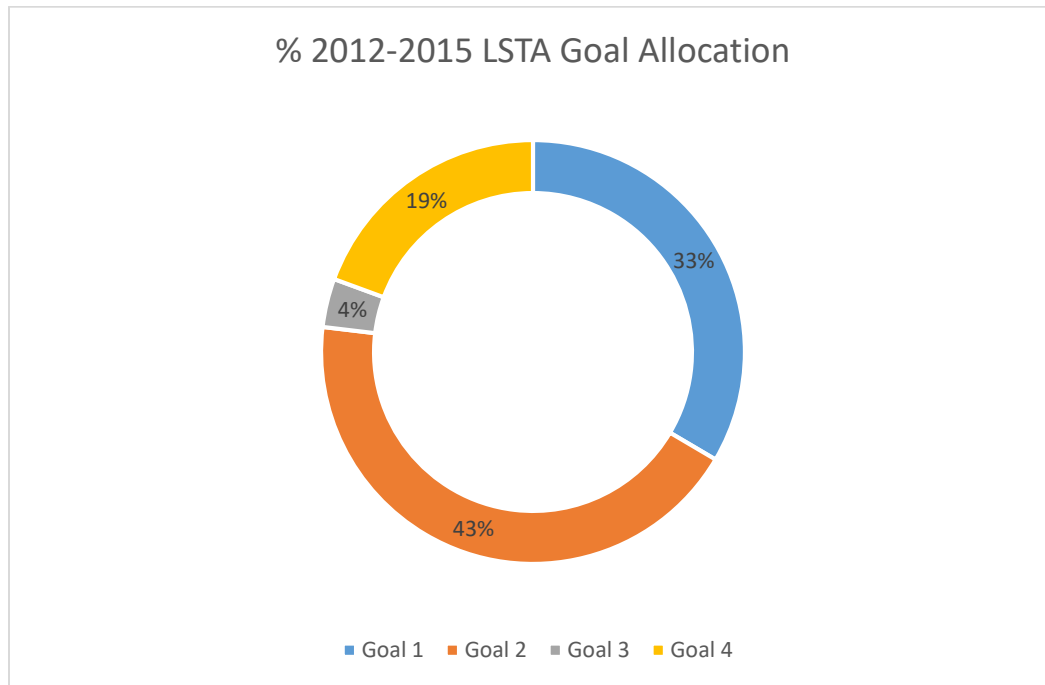
Cost of Ready2Read Rendezvous	\$4,007.00	\$15,504.42		\$15,294.14	\$ 34,805.56
Attendees	88	38		45	171
Ready2Read program development meeting			\$2,150	\$1,600.00	\$ 3,750.00
Cost of Ready2Read material information	\$7,630.00	\$3,524.82		\$1,623.48	\$ 12,778.30
Ready2Read material disseminated	5,000	60,000		15,000	80000
Cost of Summer Reading Program Training	\$2,150.00	\$1,375.00	\$2,150	\$1,600.00	\$ 7,275.00
Summer Reading Program Training Sessions	12	13	0	7	32
Cost of Summer Reading Program Manuals	\$1,100.00	\$1,100	\$1,375	\$1,375.00	\$ 4,950.00
Summer Reading Program Manuals Disseminated	440	110	110	110	770
Cost of Summer reading public service announcements		\$270.00			270
Summer reading public service announcements		6			6
Cost of MT Makers traveling makerspaces	\$18,446.78	\$18,446.78	\$4,656		\$ 41,549.56
MT Makers traveling makerspaces disseminated		18	6		24
Number of libraries that hosted makerspace kits		21	15		36
Number of programs hosted by libraries during this period that made use of the makerspace kits		52	33		85
Number of attendees at maker programs		1,647	1,254		2901
Cost of Share Your Story		\$2,082			\$ 2,082.00
Share Your Story Kits		4			4
Share Your Story Interviews		8			8
Cost of Ready2Read Rendezvous Training				\$15,294.14	\$ 15,294.14
Ready2Read Rendezvous Training Attendees				45	45
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Number of Montana titles converted from analog to digital	597	287	35	225	1144
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Number of patrons trained to use BARD	168	58	41	44	311
Number of institutions trained to use BARD	24	5	12	2	43
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Patron Outreach Project (POP) new patrons added	1051	537			1588
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Number of Patrons Served	16,299	5,237	2,991	3,113	27,640
Items Distributed	698,226	202,029	147,892	183,467	1,231,614
Number of books downloaded from BARD	87,773	19,790	23,525	28,795	159,883
Number of Braille patrons	116	69			185
Number of Braille books delivered:	14,686	2,332	82	12,169	29,269
Number of patron requests answered by Reader Advisors	61,177	14,882	18,953	12,169	107,181
Number of BARD titles duplicated for non-BARD patrons:	5,820	1,568	1,060	1,752	10,200
Number of magazine issues distributed:	69,292	17,894	12,417	12,353	111,956

2012-2015 LSTA Goal Allocation	Total	%
Goal 1	\$ 1,324,589.18	33%

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Goal 2	\$ 1,718,070.41	43%
Goal 3	\$ 146,709.64	4%
Goal 4	\$ 767,876.72	19%
	\$ 3,957,245.95	100%

2012-2015 LSTA Goal Allocation	%
Goal 1	33%
Goal 2	43%
Goal 3	4%
Goal 4	19%
	100%



. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training

**Inputs:** Partial time of 3 FTE Statewide Consulting Librarians

**Outputs:**

Activity	2012	2013	2014	2015	Total
Site Visits	412	122	135		669
E-Rate Consultations	220	60	54	51	385
Information requests from public library staff	1712	330	494	282	2818
Consultant led training (in-person and virtual)	189	50	22	52	313
Attendance at training sessions	2274	859	286	416	3835

**Output: E-Rate Consultations (N=385)**

Librarians received individual and group E-Rate consultations. The E-Rate consultant attended annual E-Rate trainings in October 2013 in Portland, OR and the 2014 Schools Health & Libraries Broadband Conference in Washington, DC, participated in the American Library Association E-Rate Task Force, and provided data to ALA Office for Information Technology Policy on MT library broadband availability, E-Rate costs, and participation. This consultant prepared comments representing MT libraries for the Federal Communications Commission E-Rate Modernization Order, and attended monthly State E-Rate Coordinator teleconference meetings.

**Outcomes:** Savings of \$390,157.28 from 2012-2015

Activity	2012	2013	2014	2015	Total
E-Rate Savings	\$80,000.00	\$82,800.00	\$92,000.00	\$135,357.28	\$390,157.28

1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.

**Inputs:** 1 FTE - Statewide CE Coordinator who managed all of the following projects.

**Outputs:**

Activity	2012	2013	2014	2015	Total
Fall Training Workshops	53	21		12	86
Workshop Attendees	561	160		140	861
Trustee Training Hours	21	9	12	12	54
Trustee Attendees	335	34	116	64	549

**Output: Trustee Training (N=54 hours, 549 attendees)**

Attendees gave the presenters high grades, and overwhelmingly noted that opportunities for trustees to network are rare and much appreciated. At the 2013 Montana Library Association meeting, the Flathead County Library System was honored as Montana’s first board where all the trustees had attained MSL certification under the state library’s certification program for trustees. This was a significant positive outcome in support of the MSL certification program and a model for other boards.

**Additional 1.4 Activities**

Activity	Frequency	Outcomes
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Summer Leadership Institute number of participants:	36	Identified projects included developing resources for succession training, planning a book festival in eastern MT, engaging with community organizations to build resources for homeless library users, initiating a “Books & Babies” program, and planning for a building remodel and expansion. These ongoing projects would be supported through ongoing communication with Institute colleagues and mentors through a forum on the Learning Portal and in-person follow-ups at conferences such as Fall Workshop and the MT Library Association annual conference.
Scholarships for library staff:	20	R-Squared attendees shared their experiences with MT colleagues through a day-long training, inspired by the conference, at the MT Library Association conference in April 2013.
Scholarships for library staff to attend the Association of Rural & Small Libraries annual conference and the American Library Association conference. Number of scholarships offered:	4	The ALA scholarship attendee partnered with Multnomah County (OR) Library staff on a webinar after attending their ALA “My Librarian” session, and shared how he was adapting their ideas at his library. The webinar had 10 live attendees and 44 plays on Vimeo.
The Montana State Library used FY14 LSTA to sponsor scholarships for public librarians and members of the Montana State Library's Network Advisory Committee to attend national conferences. Afterward, the recipients shared conference findings with their peers via recorded webinar sessions facilitated by the State Library. Scholarships for library staff:	9	Scholarship attendees have commented that without the scholarship opportunities provided through the State Library, they would never have been able to attend a national conference. Post-conference sessions also increased knowledge sharing and collegiality within the Montana library community. An hour long webinar session, “Great Ideas from the ARSL Conference,” was presented by 2014 attendees and uploaded to the MSL Vimeo channel ( <a href="http://vimeo.com/112195336">http://vimeo.com/112195336</a> ). At reporting time, this video had been replayed 22 times. The American Library Association 2015 Annual Conference Montana peer sharing webinar ( <a href="https://vimeo.com/139648042">https://vimeo.com/139648042</a> ) had been replayed 11 times.

1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training

**Inputs:** 1 FTE, 82 Citrix GoToMeeting licenses (\$10,750.22)

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Online Training Hours	292		81	59	432
GoToMeeting Licenses		82			82
Certifications	309	80	63	86	538
Number of webinars available on the MSL Vimeo channel		69			69

3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop

*life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.*

**Inputs:** 0.125 FTE for early literacy position

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Cost of early literacy staff hours	\$10,000.00	\$10,000.00	\$10,000.00	\$28,675.90	\$ 58,675.90
Number of Ready2Read training events offered:	12				12
Number of Ready2Read training (online and in-person sessions, excluding the Rendezvous) attendees	479				479
Cost of Ready2Read Rendezvous Attendees	\$4,007.00	\$15,504.42		\$15,294.14	\$ 34,805.56
Ready2Read program development meeting	88	38		45	171
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Number of libraries that hosted makerspace kits		18	6		24
Number of programs hosted by libraries during this period that made use of the makerspace kits		21	15		36
Number of attendees at maker programs		52	33		85
Cost of Share Your Story		1,647	1,254		2901
Share Your Story Kits		\$2,082			\$ 2,082.00
Share Your Story Interviews		4			4
Cost of Ready2Read Rendezvous Training		8			8
Ready2Read Rendezvous Training Attendees				\$15,294.14	
				45	

4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.

**Inputs:** 6 FTE and 90 volunteers

This funding covers staff salaries and operations for the Montana Talking Book Library (MTBL). Established in 1968, MTBL provides eligible Montana patrons, ages 3 to 103, with direct personal one-to-one patron service and support for ordering, receiving and/or downloading audio and Braille materials.

Activity/Output	2012	2013	2014	2015	Total
Number of Montana titles converted from analog to digital	597	287	35	225	1144

4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.

**Inputs:** 6 FTE

Outputs:

Activity/Output	2012	2013	2014	2015	Total
Number of patrons trained to use BARD	168	58	41	44	311
Number of institutions trained to use BARD	24	5	12	2	43

4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.

**Inputs:** MSL/MTBL contracted with a marketing firm to develop a 13-month Patron Outreach Project (POP) with the goal of increasing awareness of MTBL, new patrons, and establishing sustainability.

Outputs:

Activity/Output	2012	2013	2014	2015	Total
Patron Outreach Project (POP) new patrons added	1051	537			1588

4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.

**Inputs:** 6 FTE

Outputs:

Activity/Output	2012	2013	2014	2015	Total
Number of Patrons Served	16,299	5,237	2,991	3,113	27,640
Items Distributed	698,226	202,029	147,892	183,467	1,231,614
Number of books downloaded from BARD	87,773	19,790	23,525	28,795	159,883
Number of Braille patrons	116	69			185
Number of Braille books delivered:	14,686	2,332	82	12,169	29,269
Number of patron requests answered by Reader Advisors	61,177	14,882	18,953	12,169	107,181
Number of BARD titles duplicated for non-BARD patrons:	5,820	1,568	1,060	1,752	10,200



Number of magazine issues distributed:	69,292	17,894	12,417	12,353	111,956
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**Outputs:** A total of 92 libraries and branches now participate in MontanaLibrary2Go.

Table 1 - MontanaLibrary2Go Circulation from 2012-2015

Activity/Output	2012	2013	2014	2015	Total
MontanaLibrary2Go Circulation (e-resources)	2,641,906	607,637	749,996	862,563	4,862,102
MontanaLibrary2Go New Patrons	60,064	16,921	12,305	13,207	102,497
New items added to MontanaLibrary2Go	26,675	4,458	8,154	7,510	46,797
Total items available in MontanaLibrary2Go	20,314	22,539	30,693		

**Montana Memory Project**

Activity/Output	2012	2013	2014	2015	Total
Montana Memory Project (MMP) Training Presentations	165	46	56	53	320
Attendees	1670	412	840	318	3,240
MMP Outreach Visits		38	26	22	86
Digital Collections Improved	1	78			
New Collections Added	9	9	25	4	47
Number of collections hosted on MMP website	178	78	103	48	407
Contributing Institutions	161	38	45	48	292
Number of images hosted on site	2,069,128	254,762	860,164	707,964	3,892,018
Number of images added		254,762	104,402		359,164
Website Visits		124,769	174,430		299,199

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
EBSCO Discovery Service for all Montana libraries	800	800	800	800	3,200
Training Sessions	40	13			53
Training Attendees	329	117			446
Search Statistics	202,147	69,069	76,508		347,724

2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. *LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.*

**Inputs:** 4 FTE (2.34 paid with LSTA and 1.66 from member fees).

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Montana Shared Catalog Allocations	\$181,310.00	\$172,150	\$176,254	\$184,912.62	\$714,626.62
Help Requests	33,780	17,000	1,890	1,890	54,560
Training Sessions Offered	130	44	15	34	223

Attendees	1427	423	182	442	2,474
Number of Libraries Added to MSC	38	3	2	7	50
Startup and data migration fees	\$54,850.16	\$16,344	\$1,900	\$39,667.00	\$112,761.16

2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. *LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.*

**Inputs:** 0.25 FTE (Statewide Projects Librarian, paid with state funds); state match = \$98,886; non-state match = \$369,730; in-kind match = 45 hours’ member library staff time

Enrolled libraries have access to discovery, cataloging, and interlibrary loan tools, with costs based on a formula that keeps OCLC affordable for all libraries. The Group Services contract includes access to CatExpress, Connexion, FirstSearch, WorldCat, and WorldShare Interlibrary Loan. The Statewide Projects Librarian administered the OCLC Group Services project.

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Offset costs to participating libraries for access to OCLC cataloging, interlibrary loan, and authentication tools	\$59,736.00	\$62,277	\$89,741	\$75,380.00	\$287,134.00
Number of libraries enrolled to receive discounted access to OCLC Group Services	1045	251	272	273	1,841
Number of original catalog records added to WorldCat	8,336	3,140	2,933	2,000	16,409
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Courier Project	\$16,334.00				\$ 16,334.00
startup costs for joining the courier service	\$10,372.68		\$7,839	\$5,765.50	\$ 23,977.18
Number of libraries that received this discount	43		19	18	80
Number of items circulating via courier per month	17,060		685	16,265	

**E2 – Survey Responses Summary Tables**

*Table 2 - Primary Challenges Facing Montana Libraries*

Category	f
1. Funding/Budget: adequate and consistent	38
2. Staffing: Adequate librarians to meet community needs, training, and continuing education	28
3. Physical Accessibility: locations/geography, hours of operation, secure, safe and adequately sized buildings	25
4. Resources: Books, research materials, subscriptions, databases, electronic and digital sources, and MontanaLibrary2Go	16
5. Community buy-in/participation	15
6. Federal, state, local advocacy, partnerships, and collaboration	11
7. Computers, printers, scanners, software, up-to-date applications, i.e. Excel, Word, Adobe: including user instructions	11
8. Marketing/outreach	9
9. Internet/Wi-Fi, E-rate	8
10. Life-long educational and entertainment programming	5

*Table 3 - Primary Opportunities for Montana Libraries*

Category	f
1. Life-long educational and entertainment programming: including literacy	22
2. Staff: Maintain and fill needed positions, support and leadership, training and education	15
3. Private/Public/Governmental partnerships and advocacy	14
4. Marketing/Outreach	12
5. Interlibrary collaboration	11
6. Funding/budget, grants	10
7. Technology: computers, applications, internet, digital access	8
8. Resources: books, magazines, newspapers, research materials, electronic and digital materials, databases	7
9. Access: adequate geographic locations, safe and sufficient buildings, adequate hours of operation	6
10. Community participation/buy-in	5
11. Community space/events	5

**What do you believe are the three most important resources, programs, or services the Library should provide to benefit you and the community?**

Category	Priority 1	Priority 2	Priority 3	Total
1. <b>Life-long entertainment and educational programming:</b> including children and Youth and adult programming and services, especially early child and adult literacy	24	47	50	121
2. <b>Technology and digital access:</b> Internet/Wi-Fi, affordable and accessible, digital/electronic resources and databases	33	37	36	106

3. <b>Books, magazines, and newspapers:</b> including difficult-to-locate and books-on-tape	49	29	15	93
4. <b>Access:</b> hours, geographical location, easy check out, information	25	23	12	60
5. Public Space/community center: welcoming and diverse	4	12	28	44
6. Computers: including printers, operating instructions and safety precautions	12	18	11	41
7. Research/Reference resources	16	12	13	41
8. Collaboration, partnerships, and advocacy: State and national level, Interlibrary card, ILL, shared databases	12	9	12	33
9. Staffing: Adequate staff to meet community needs, continuing education, and training	7	8	4	19
10. Catalog	9	4	3	16

Table 4 - State Library Services Used

### Montana State Library Five-Year LSTA Evaluation Survey

Which of the following have you used or been a participating member of from 2013-2016 (check all that apply)?

Answer Options	Response Percent	Response Count
OCLC Group Services (cataloging and interlibrary loan)	85.2%	98
Montana Shared Catalog	75.7%	87
Downloadable e-content	65.2%	75
Discovery	40.0%	46
CE program	68.7%	79
Consulting	27.8%	32
Courier Service	37.4%	43
Montana Memory Project (MMP)	45.2%	52
Early Literacy	40.0%	46
Montana Talking Book Library (MTBL)	16.5%	19
Other (please specify) and/or please feel to clarify or elaborate:		10
<i>answered question</i>		<b>115</b>

Table 5 - Highest Rated State Library Services

To what extent are you satisfied with the following State Library programs?		
Answer Options	Rating Average	Response Count
1. OCLC Group Services (cataloging and interlibrary loan)	6.31	95
2. Montana Shared Catalog	6.21	96
3. CE program	6.03	93
4. Montana Talking Book Library (MTBL)	5.73	90
5. Early Literacy	5.65	95
6. Montana Memory Project (MMP)	5.53	92
7. Downloadable e-content	5.48	95
8. Consulting	5.33	91
9. Courier Service	5.15	95
10. Discovery	4.20	89

To what extent do you agree that the State Library addressed these previous 2012 evaluation recommendations:		
Answer Options	Rating Average	Response Count
#1. MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services. Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.	6.30	11
#2. MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services. The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.	6.40	11
#3. MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries. The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.	6.27	11
#4. The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group. Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.	6.08	12
#5. MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago. The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation's population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library	6.27	11

location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.

**To what extent do you feel the State Library has helped Montana libraries with the following services over the past four years (2013-2016)?**

<b>Answer Options</b>	<b>Rating Average</b>	<b>Response Count</b>
#3. Providing training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (e.g. library certification (CE) program)	5.98	118
#1. Expanding services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (e.g. programming training for librarians)	5.53	118
#2. Establishing or enhancing electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (e.g. providing discounted access to digital collections, online resources for patrons, and services for library staff such as OCLC Group Services)	5.49	118
#8. Developing library services that provide all users access to information through local, state, regional, national, and international collaborations and networks.	5.21	107
#6. Targeting library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	4.86	109
#5. Developing public and private partnerships with other agencies and community-based organizations	4.84	114
#7. Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line applicable to a family of the size involved	4.78	106
#4. Enhancing efforts to recruit future professionals to the field of library and information services.	4.40	114
	5.14	

<b>Category</b>	<b>f</b>
1. Training and consultation services: technology, services, leadership, conferences, workshops in a variety of locations	17
2. Difficulty achieving goals: loss of EBSCO databases, HomeworkMT, and Tutor.com have limited achieving goals	15
3. Interlibrary partnership/collaboration: OCLC, Montana Library2Go, and the Shared Catalog	15
4. Diverse and locally relevant programming	7

5.	Librarian educational resources	5
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Category		f
1.	Interlibrary collaboration and partnerships improving resource affordability and access: digital and electronic, Montana Library2Go, Memory project, and Montana Shared Catalog	20
2.	Funding cuts and loss of resources impacting quality and diversity of services offered: EBSCO databases, Tutor.com	14
3.	Staffing and leadership: support, training, and consulting have helped improve accessibility and usability	11
4.	Improving due to budgeting assistance, grants, and associated cost savings	7
5.	Limited due to difficulty in accessing/understanding electronic services: need direct access to Overdrive, Kindle downloads, Montana Library2Go, improved website usability, and clear user friendly instructions	4
6.	School libraries are a low priority	4

Category		f
1.	Multiple staff and leadership trainings, professional development and continuing education opportunities	21
2.	Need more trainings, continuing education, courses/workshops: diverse and specific topics held in various geographic locations, improved communication, return of fall workshops, and available to full and part-time staff	14
3.	Online and distance learning	5
4.	Interlibrary collaboration/partnerships: technology, databases, cost savings, and wider staff knowledge base	4

Category		f
1.	Have not seen or aware of such efforts	11
2.	Do not know	7
3.	By providing scholarships and continuing education opportunities: i.e. Sheila Cates scholarships	5

Table 6 - Goal 1 and Objective 1 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals (part 1).	6.42	12
Goal 1: MSL provides appropriate trainings and training resources so that the best use can be made of the resources offered (part 2).	6.42	12

1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc.	5.82	11
1.1.1. LSTA will be used for MSL staff to research and stay abreast of library developments (part 1)	5.83	12
1.1.1. LSTA will be used to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision (part 2).	6.08	12

Table 7- Goal 1, Objective 2 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment.	5.50	12
1.2.1. LSTA will be used for MSL staff to assist library leaders with these efforts.	6.09	11

Table 8 - Goal 1, Objective 1.3 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.3. Provide consultant services for librarians across the state on relevant topics and technology.	6.36	11
1.3.1. LSTA will be used for MSL staff to provide onsite consultation and training	6.17	12

Table 9 - Goal 1, Objective 1.4 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities.	6.33	12
1.4.1. Provide regular venues for librarians to network, share, discuss, and brainstorm.	6.25	12
1.4.2. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	6.25	12

Table 10- Goal 1, Objective 1.5 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count



1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others.	6.50	12
1.5.1. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars (part 1).	6.25	12
1.5.1. LSTA will be used to locate and promote other online training for Montana librarians to attend (part 2).	6.42	12
1.5.2. LSTA will also be used for equipment and software for producing and accessing online training.	5.83	12

Table 11- Goal 1, Objective 1.6 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.6. Provide a clearinghouse for information on conventional and online training opportunities.	6.36	11
1.6.1. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.	5.64	12

Table 12 - Goal 2, Objective 1 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
Goal 2. MSL acquires and manages relevant quality content that meets the needs of Montana library users (part 1).	5.75	12
Goal 2. MSL provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (part 2).	6.08	12
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually.	5.83	12
2.1.1. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources.	5.92	12
2.1.2. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	5.83	12

Table 13 - Goal 2, Objective 2 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources.	6.55	12
2.2.1. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization.	6.36	12

2.2.2. LSTA will also provide high-quality digitization equipment for libraries to use.	5.18	12
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Table 14- Goal 2, Objective 3 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons.	5.27	11
2.3.1 LSTA will be used for MSL staff to research and evaluate existing and beta products (part 1).	5.20	10
2.3.1 LSTA will be used to negotiate statewide discounts (part 2).	5.60	11
2.3.1 LSTA will be used to train librarians and patrons in use of existing and new products (part 3).	5.58	12
2.3.1 LSTA will be used to develop materials to promote use of the tools across the state (part 4).	5.58	12
2.3.2. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.	5.75	12

Table 15-Goal 2, Objective 4 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web.	6.67	12
2.4.1. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	6.67	12

Table 16 - Goal 2, Objective 5 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.5. Explore opportunities to improve Internet access and technology support for libraries.	5.92	12
2.5.1. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources.	5.91	12
2.5.2. LSTA could also be used to assist libraries with enhanced access when appropriate.	5.89	11

Table 17 - Goal 2, Objective 6 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items.	6.42	12
2.6.1. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries.	6.08	12
2.6.2. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	6.36	12

Table 18 - Goal 3, Objective 1 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
Goal 3. MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons.	6.58	12
3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections.	6.58	12
3.1.1. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.	6.33	12

Table 19 - Goal 3, Objective 2 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools.	5.73	11
3.2.1. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]	5.80	11

Table 20 - Goal 3, Objective 3

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content.	6.27	11

3.3.1. LSTA will be used for MSL staff to explore and establish partnerships for MMP.	6.10	10
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Table 21 - Goal 3, Objective 4

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.4. Continue to develop programming materials and tools for libraries to use (part 1).	5.90	11
3.4. Continue to partner with other state agencies and organizations (part 2).	5.82	11
3.4.1. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community.	5.90	11
3.4.2. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	5.20	11

Table 22 - Goal 3, Objective 5 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries.	6.09	12
3.5.1. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)	6.00	12

Table 23 - Goal 3, Objective 6 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives.	5.56	11
3.6.1. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.	5.56	11

Table 24 - Goal 4, Objective 1 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
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Answer Options	Rating Average	Response Count
Goal 4. MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons (part 1).	6.42	12
Goal 4. MSL provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (part 2).	6.25	12
4.1. Continue digitization of recorded Montana materials.	6.25	12
4.1.1. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.	6.50	12

Table 25 - Goal 4, Objective 2 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers.	6.36	12
4.2.1. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	6.09	12

Table 26 - Goal 4, Objective 3 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available.	6.75	11
4.3.1. LSTA will be used to purchase KLAS upgrades and provide system maintenance.	6.75	11
4.3.2. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	6.56	12

Table 27-Goal 4, Objective 4 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons.	6.00	11
4.4.1. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	6.14	11

Table 28 - Goal 4, Objective 5 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.5. Increase the amount of accessible materials to individuals who cannot read standard print.	6.18	12
4.5.1. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	6.18	12

Table 29 - Goal 4, Objective 6 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services.	6.27	12
4.6.1. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.	6.36	12

Table 30 - Were Any Goals Not Achieved?

Were any of the following four State Library LSTA goals for 2013-2017 NOT ACHIEVED as anticipated (select all that apply) (A-1 sub question)?		
Answer Options	Response Percent	Response Count
Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.	8.3%	1
Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.	8.3%	1
Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons.	8.3%	1
Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need.	8.3%	1
All four of our LSTA goals were met.	100.0%	12
Please discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed to the lack of progress for any of the four goals (A-1 sub question)?		1
<b>Answered Question</b>		<b>12</b>

Table 31 - Satisfaction with Progress Towards Focal Areas

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
<b>1. Lifelong Learning (MSL Goal 3)</b>	5.32	95
<b>2. Information Access (MSL Goals 2, 3, 4)</b>	5.24	90
1.2. Improved users' general knowledge and skills	5.10	92
<b>6. Civic Engagement</b>	5.09	81
2.1. Improved users' ability to discover information resources	4.97	92
6.1. Improved users' ability to participate in their community	4.97	86
<b>3. Institutional Capacity (MSL Goals 1, 3)</b>	4.96	84
2.2. Improved users' ability to obtain and/or use information resources	4.95	89
3.3. Improved library operations	4.94	91
5.3. Improved users' ability to apply information that furthers their parenting and family skills	4.92	88
3.1. Improved the library workforce	4.90	90
3.2. Improved the library's physical and technological infrastructure	4.87	90
6.2. Improved users' ability to participate in community conversations around topics of concern.	4.83	85
<b>5. Human Services</b>	4.68	76
1.1. Improved users' formal education	4.64	90
<b>4. Economic &amp; Employment Development</b>	4.59	82
4.1. Improved users' ability to use resources and apply information for employment support	4.56	91
4.2. Improved users' ability to use and apply business resources	4.49	90
5.1. Improved users' ability to apply information that furthers their personal, family, or household finances	4.48	85
5.2. Improved users' ability to apply information that furthers their personal or family health & wellness	4.44	85
	4.85	

Table 32 - Satisfaction with Focal Area 1

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
<b>1. Lifelong Learning (MSL Goal 3)</b>	5.32	95
1.1. Improved users' formal education	4.64	90
1.2. Improved users' general knowledge and skills	5.10	92

Table 33 - Staff and Librarian Satisfaction with Focal Area 2

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
<b>2. Information Access (MSL Goals 2, 3, 4)</b>	5.24	90

2.1. Improved users' ability to discover information resources	4.97	92
2.2. Improved users' ability to obtain and/or use information resources	4.95	89

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
3. Institutional Capacity (MSL Goals 1, 3)	4.96	84
3.1. Improved the library workforce	4.90	90
3.2. Improved the library's physical and technological infrastructure	4.87	90
3.3. Improved library operations	4.94	91

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
4. Economic & Employment Development	4.59	82
4.1. Improved users' ability to use resources and apply information for employment support	4.56	91
4.2. Improved users' ability to use and apply business resources	4.49	90

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
5. Human Services	4.68	76
5.1. Improved users' ability to apply information that furthers their personal, family, or household finances	4.48	85
5.2. Improved users' ability to apply information that furthers their personal or family health & wellness	4.44	85
5.3. Improved users' ability to apply information that furthers their parenting and family skills	4.92	88

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
6. Civic Engagement	5.09	81
6.1. Improved users' ability to participate in their community	4.97	86
6.2. Improved users' ability to participate in community conversations around topics of concern.	4.83	85



Table 34 - Focal Groups Focused on in Five-Year Plan

Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes = 10% or more of LSTA funds were allocated toward that specific group)?			
Answer Options	Yes	No	Response Count
1. Individuals with disabilities	10	0	10
2. Library workforce (current and future)	9	0	9
3. Families	8	1	9
4. Children (aged 0-5)	6	2	8
5. School-aged youth (aged 6-17)	5	3	8
6. Individuals with limited functional literacy or information skills	4	5	9
7. Ethnic or minority populations	2	6	8
8. Individuals living below the poverty line	1	7	8
9. Individuals that are unemployed/underemployed	1	6	7
10. Immigrants/refugees	0	8	8

To what extent do you agree with the following statement:		
Answer Options	Rating Average	Response Count
The State Library used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan (B1).	5.78	11

To what extent do you agree with the following statement:		
Answer Options	Rating Average	Response Count
The State Library made changes to the Five-Year Plan (B2).	4.00	11

To what extent do you agree with the following statement:		
Answer Options	Rating Average	Response Count
The State Library shared data from the old and new SPR and from other evaluation resources (B3).	4.89	11

Table 35 - Survey Participants

### Montana State Library Five-Year LSTA Evaluation Survey

Your Primary Status (choose the answer choice that best describes you):

Answer Options	Response Percent	Response Count
State Library Staff	5.1%	11
Librarian or Library Staff	43.3%	93
Library Administrator	14.4%	31
Patron or General Community Member	30.7%	66
Network Advisory Council member	0.5%	1
State Library Commission member	1.4%	3
Public Library Trustee	4.7%	10
<i>answered question</i>		<b>215</b>

*Library Usage*

Think about the past 12 months. In a typical month, approximately how often did you visit or use in any way (in person, online, and/or service) a library?		
Answer Options	Response Percent	Response Count
Weekly	37.0%	20
Not at all	27.8%	15
Monthly	16.7%	9
Every few months	14.8%	8
A few times a year	3.7%	2

Table 36 - Patron Random Sample Future IMLS Priorities

To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?		
Answer Options	Rating Average	Response Count
#1 - Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	5.40	47
#8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	5.33	48
#3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	5.30	46
#2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	5.08	48
#7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line	5.00	47

(as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved

#4 -Enhance efforts to recruit future professionals to the field of library and information services	4.76	45
#6 - Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	4.57	46
#5 - Develop public and private partnerships with other agencies and community-based organizations	4.46	46

<b>To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?</b>					
<b>Answer Options</b>	<b>Staff Rank (n=7)</b>	<b>SLC and NAC Rank (n=4)</b>	<b>Librarian Rank (n=90)</b>	<b>Patron Random Sample Rank (n=47)</b>	<b>Average Rank</b>
#1 - Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	3	1	1	1	1.5
#2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	6	2	3	4	3.75
#3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	2	3	2	3	2.5
#4 -Enhance efforts to recruit future professionals to the field of library and information services	8	8	8	6	7.5
#5 - Develop public and private partnerships with other agencies and community-based organizations	4	4	7	8	5.75
#6 - Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	7	6	6	7	6.5
#7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved	5	7	5	5	5.5
#8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	1	5	4	2	3

<b>To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?</b>						
<b>Answer Options</b>	<b>Staff Rank (n=7)</b>	<b>SLC and NAC Rank (n=4)</b>	<b>Librarian Rank (n=90)</b>	<b>Patron Random Sample Rank (n=47)</b>	<b>Average Rank</b>	<b>Composite Rank</b>
#1 - Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	3	1	1	1	1.5	1
#3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	2	3	2	3	2.5	2
#8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	1	5	4	2	3	3
#2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	6	2	3	4	3.75	4
#7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved	5	7	5	5	5.5	5
#5 - Develop public and private partnerships with other agencies and community-based organizations	4	4	7	8	5.75	6
#6 - Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	7	6	6	7	6.5	7
#4 - Enhance efforts to recruit future professionals to the field of library and information services	8	8	8	6	7.5	8

Table 37 - IMLS Priorities for 2018-2022

**To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?**

Answer Options	Rating Average	Response Count
#1. Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	5.99	158
#3. Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	5.90	157
#2. Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	5.74	159
#8. Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	5.65	158
#7. Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved	5.46	157
#6. Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	5.22	156
#5. Develop public and private partnerships with other agencies and community-based organizations	5.09	153
#4. Enhance efforts to recruit future professionals to the field of library and information services	4.93	155
Average	5.50	

**Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?**

Answer Options	Rating Average	Response Count	Rank
<b>2. Information Access</b>	6.08	51	1
<b>1. Lifelong Learning</b>	5.88	51	2
2.2. Improve users' ability to obtain and/or use information resources	5.73	51	3
2.1. Improve users' ability to discover information resources	5.69	51	4
1.2. Improve users' general knowledge and skills	5.56	50	5
6.1. Improve users' ability to participate in their community	5.45	44	6
6.2. Improve users' ability to participate in community conversations around topics of concern.	5.32	44	7
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	5.31	42	8
<b>6. Civic Engagement</b>	5.26	34	9

5.3. Improve users' ability to apply information that furthers their parenting and family skills	5.21	42	10
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	5.14	42	11
4.2. Improve users' ability to use and apply business resources	4.94	47	12
<b>5. Human Services</b>	4.92	38	13
4.1. Improve users' ability to use resources and apply information for employment support	4.83	47	14
1.1. Improve users' formal education	4.78	49	15
3.1. Improve the library workforce	4.72	46	16
3.2. Improve the library's physical and technological infrastructure	4.65	46	17
4. Economic & Employment Development	4.61	44	18
3.3. Improve library operations	4.56	45	19
3. Institutional Capacity	4.43	40	20

Table 38 – Composite Future Focal Area Rankings

Answer Options	Staff Rank (n=7)	SLC/NAC Rank (n=4)	Librarian Rank (n=86)	Patron Random Sample Rank (n=45)	Average Rank	Composite Rank
<b>2. Information Access</b>	1	2	1	1	1.25	1
2.2. Improve users' ability to obtain and/or use information resources	2	4	2	3	2.75	2
1.2. Improve users' general knowledge and skills	4	1	6	5	4	3
2.1. Improve users' ability to discover information resources	9	3	3	4	4.75	4
<b>1. Lifelong Learning</b>	3	13	4	2	5.5	5
3.2. Improve the library's physical and technological infrastructure	5	5	5	17	8	6
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	6	11	11	8	9	7
3.1. Improve the library workforce	7	7	7	16	9.25	8
6.1. Improve users' ability to participate in their community	19	6	10	6	10.25	9
5.3. Improve users' ability to apply information that furthers their parenting and family skills	8	12	12	10	10.5	10
6. Civic Engagement	18	9	13	9	12.25	11
3.3. Improve library operations	10	15	9	19	13.25	12
<b>4. Economic &amp; Employment Development</b>	11	8	18	18	13.75	13
6.2. Improve users' ability to participate in community conversations around topics of concern.	16	18	15	7	14	14
<b>3. Institutional Capacity</b>	15	14	8	20	14.25	15

4.2. Improve users' ability to use and apply business resources	17	10	19	12	14.5	16
<b>5. Human Services</b>	13	16	16	13	14.5	17
4.1. Improve users' ability to use resources and apply information for employment support	12	19	14	14	14.75	18
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	14	17	17	11	14.75	19
1.1. Improve users' formal education	20	20	20	15	18.75	20

Table 39 - Future Focal Area Average Ratings

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?			
Answer Options	Rating Average	Response Count	Rank
<b>2. Information Access</b>	6.20	158	1
2.2. Improve users' ability to obtain and/or use information resources	6.05	157	2
2.1. Improve users' ability to discover information resources	5.93	158	3
<b>1. Lifelong Learning</b>	5.89	156	4
1.2. Improve users' general knowledge and skills	5.71	158	5
3.2. Improve the library's physical and technological infrastructure	5.49	155	6
6.1. Improve users' ability to participate in their community	5.48	151	7
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	5.43	150	8
5.3. Improve users' ability to apply information that furthers their parenting and family skills	5.42	149	9
6.2. Improve users' ability to participate in community conversations around topics of concern.	5.41	150	10
<b>6. Civic Engagement</b>	5.40	134	11
3.1. Improve the library workforce	5.37	154	12
3.3. Improve library operations	5.31	154	13
<b>5. Human Services</b>	5.28	138	14
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	5.26	149	15
4.1. Improve users' ability to use resources and apply information for employment support	5.24	156	16
<b>3. Institutional Capacity</b>	5.23	141	17
4.2. Improve users' ability to use and apply business resources	5.12	155	18
<b>4. Economic &amp; Employment Development</b>	5.03	147	19
1.1. Improve users' formal education	4.89	155	20
Average	5.46		

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?									
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
1. Lifelong Learning	3	1	6	13	25	37	71	5.89	156

1.1. Improve users' formal education	9	6	14	35	29	24	38	4.89	155
1.2. Improve users' general knowledge and skills	4	0	7	17	24	53	53	5.71	158

**Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?**

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
2. Information Access	2	1	3	8	18	38	88	6.20	158
2.1. Improve users' ability to discover information resources	3	3	1	9	33	39	70	5.93	158
2.2. Improve users' ability to obtain and/or use information resources	3	1	1	9	24	47	72	6.05	157

**Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?**

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
3. Institutional Capacity	7	8	2	18	36	33	37	5.23	141
3.1. Improve the library workforce	8	5	7	16	30	42	46	5.37	154
3.2. Improve the library's physical and technological infrastructure	6	5	4	21	25	44	50	5.49	155
3.3. Improve library operations	6	8	4	21	34	38	43	5.31	154

**Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?**

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
4. Economic & Employment Development	5	5	7	41	28	28	33	5.03	147
4.1. Improve users' ability to use resources and apply information for employment support	6	2	6	36	33	31	42	5.24	156
4.2. Improve users' ability to use and apply business resources	7	2	6	38	36	30	36	5.12	155

**Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?**

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
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5. Human Services	5	3	9	22	30	31	38	5.28	138
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	3	4	11	23	40	29	39	5.26	149
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	3	2	9	25	33	30	48	5.43	150
5.3. Improve users' ability to apply information that furthers their parenting and family skills	5	5	6	23	25	38	47	5.42	149

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
6. Civic Engagement	5	1	6	25	22	36	39	5.40	134
6.1. Improve users' ability to participate in their community	4	1	6	24	30	44	42	5.48	151
6.2. Improve users' ability to participate in community conversations around topics of concern.	4	3	7	20	35	41	40	5.41	150

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?

Answer Options	Rating Average	Response Count	Rank
School-aged youth (aged 6-17)	6.04	47	1
Families	5.89	47	2
Children (aged 0-5)	5.58	45	3
Individuals with limited functional literacy or information skills	5.57	47	4
Individuals with disabilities	5.43	47	5
Library workforce (current and future)	5.27	46	6
Individuals that are unemployed/underemployed	5.12	46	7
Individuals living below the poverty line	5.09	47	8
Ethnic or minority populations	4.63	47	9
Immigrants/refugees	4.07	47	10
Average	5.27		

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?

Answer Options	Staff Rank (n=7)	SLC and NAC (n=4)	Librarian Rank (n=85)	Patron Random Sample Rank (n=47)	Average Rankings	Rankings
School-aged youth (aged 6-17)	5	2	1	1	2.3	1
Individuals with limited functional literacy or information skills	2	1	5	4	3.0	2

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Families	8	2	2	2	3.5	3
Library workforce (current and future)	3	2	4	6	3.8	4
Individuals with disabilities	1	2	7	5	3.8	4
Children (aged 0-5)	9	2	3	3	4.3	6
Individuals living below the poverty line	4	2	6	8	5.0	7
Ethnic or minority populations	6	2	9	9	6.5	8
Individuals that are unemployed/underemployed	10	2	8	7	6.8	9
Immigrants/refugees	7	10	10	10	9.3	10

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?

Answer Options	Rating Average	Response Count
1. School-aged youth (aged 6-17)	6.16	152
2. Families	6.01	153
3. Children (aged 0-5)	5.95	151
4. Individuals with limited functional literacy or information skills	5.73	151
5. Library workforce (current and future)	5.62	151
6. Individuals with disabilities	5.53	153
7. Individuals living below the poverty line	5.46	154
8. Individuals that are unemployed/underemployed	5.36	152
9. Ethnic or minority populations	5.03	153
10. Immigrants/refugees	4.52	152
	5.54	

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	N/A	Rating Average	Response Count
Library workforce (current and future)	2	3	7	19	23	36	51	10	5.62	151
Individuals living below the poverty line	3	2	10	18	35	34	45	7	5.46	154
Individuals that are unemployed/underemployed	3	4	9	20	39	27	44	6	5.36	152

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	N/A	Rating Average	Response Count
Ethnic or minority populations	6	7	11	23	38	21	37	10	5.03	153
Immigrants/refugees	13	9	15	34	25	19	28	9	4.52	152

Individuals with disabilities	3	3	7	16	35	37	46	6	5.53	153
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To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	N/A	Rating Average	Response Count
Individuals with limited functional literacy or information skills	2	2	5	13	37	34	56	2	5.73	151
Families	2	1	0	9	31	40	64	6	6.01	153
Children (aged 0-5)	3	2	2	13	22	35	69	5	5.95	151
School-aged youth (aged 6-17)	2	1	2	4	24	40	75	4	6.16	152

### Montana State Library Five-Year LSTA Evaluation Survey

Think about the past 12 months. In a typical month, approximately how often did you visit or use in any way (in person, online, and/or service) a library?

Answer Options	Response Percent	Response Count
Daily	29.0%	49
Weekly	42.6%	72
Monthly	11.2%	19
Every few months	7.1%	12
A few times a year	1.2%	2

Think about the past 12 months. In a typical month, approximately how often did you visit or use in any way (in person, online, and/or service) a library?

Answer Options	Response Percent	Response Count
Weekly	37.0%	20
Not at all	27.8%	15
Monthly	16.7%	9
Every few months	14.8%	8
A few times a year	3.7%	2

### Montana State Library Five-Year LSTA Evaluation Survey

How long does it usually take you to travel to visit the library you most often use?

Answer Options	Response Percent	Response Count
0-5 minutes	28.7%	31
5-10 minutes	29.6%	32

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10-15 minutes	17.6%	19
15-20 minutes	13.0%	14
More than 20 minutes	7.4%	8
Other (please specify) or please feel free to elaborate:	3.7%	4
<i>answered question</i>		<b>108</b>
<i>skipped question</i>		<b>107</b>

Number	Response Date	Other (please specify) or please feel free to elaborate:	Categories
1	Jan 9, 2017 7:20 PM	25-30 minutes	
2	Jan 6, 2017 10:16 PM	Dependent on bookmobile service	
3	Jan 4, 2017 9:32 PM	20-25 minutes	
4	Oct 25, 2016 5:05 PM	I access online libraries and information.	

**How long does it usually take you to travel to visit the library you most often use?**

Answer Options	Response Percent	Response Count
0-5 minutes	25.6%	10
5-10 minutes	30.8%	12
10-15 minutes	17.9%	7
15-20 minutes	10.3%	4
More than 20 minutes	7.7%	3
Other (please specify) or please feel free to elaborate:	7.7%	3
<i>answered question</i>		<b>39</b>
<i>skipped question</i>		<b>15</b>

**Montana State Library Five-Year LSTA Evaluation Survey**

**Do you live in Billings, Missoula, or Great Falls (communities with more than 50,000 residents)?**

Answer Options	Response Percent	Response Count
Yes	15.4%	20
No	81.5%	106

**Do you live in Billings, Missoula, or Great Falls (communities with more than 50,000 residents)?**

Answer Options	Response Percent	Response Count
Yes	12.0%	3
No	88.0%	22
Other (please specify)	0.0%	0
<i>answered question</i>		<b>25</b>

### Montana State Library Five-Year LSTA Evaluation Survey

Please tell us your Gender:		
Answer Options	Response Percent	Response Count
Female	82.5%	127
Male	17.5%	27

Please tell us your Gender:		
Answer Options	Response Percent	Response Count
Female	70.6%	36
Male	29.4%	15

### Montana State Library Five-Year LSTA Evaluation Survey

Please tell us your Race and check all that apply:		
Answer Options	Response Percent	Response Count
White	92.1%	140
White (Spanish/Hispanic/Latino)	2.6%	4
Black or African American	0.0%	0
American Indian or Alaskan Native	2.6%	4
Asian	0.7%	1
Native Hawaiian or Other Pacific Islander	0.0%	0

Please tell us your Race and check all that apply:		
Answer Options	Response Percent	Response Count
White	92.0%	46
White (Spanish/Hispanic/Latino)	4.0%	2
Black or African American	0.0%	0
American Indian or Alaskan Native	2.0%	1
Asian	2.0%	1
Native Hawaiian or Other Pacific Islander	0.0%	0
Other (please specify)	2.0%	1
<i>answered question</i>		<b>50</b>

### Montana State Library Five-Year LSTA Evaluation Survey

Please tell us your Age Range:

Answer Options	Response Percent	Response Count
17 or Under	0.0%	0
18-24	0.6%	1
25-34	8.3%	13
35-44	14.1%	22
45-54	20.5%	32
55-64	32.1%	50
65-74	21.2%	33
75+	3.2%	5

Please tell us your Age Range:

Answer Options	Response Percent	Response Count
17 or Under	0.0%	0
18-24	2.0%	1
25-34	3.9%	2
35-44	2.0%	1
45-54	11.8%	6
55-64	31.4%	16
65-74	45.1%	23
75+	3.9%	2
<i>answered question</i>		<b>51</b>

### Montana State Library Five-Year LSTA Evaluation Survey

Please tell us what is the Primary Language you speak at home:

Answer Options	Response Percent	Response Count
English	100.0%	156
Spanish	0.0%	0
Native American (please specify tribal language) or Other (please specify)	0.0%	0
<i>answered question</i>		<b>156</b>

### Montana State Library Five-Year LSTA Evaluation Survey

Your Education (highest degree earned):

Answer Options	Response Percent	Response Count
Some high school	0.0%	0
High School diploma	16.1%	25

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Associate Arts (two-year community college)	9.0%	14
Technical Certificate	5.2%	8
Bachelor's Degree	28.4%	44
Master's Degree	35.5%	55
Ph.D./Ed.D.	0.6%	1
JD	0.6%	1
MD	0.0%	0
Other (please specify)	4.5%	7
<b>answered question</b>		<b>155</b>
<b>skipped question</b>		<b>60</b>

Number	Response Date	Other (please specify)	Categories
3	Nov 7, 2016 8:02 PM	up to two years of college	
4	Oct 25, 2016 8:48 PM	Some College and Library Certification	
5	Oct 19, 2016 9:31 PM	Have bachelors and working on masters	
6	Oct 18, 2016 9:02 PM	B.A. Plus many various non-degree University courses.	
7	Oct 18, 2016 8:01 PM	some college	

**Your Education (highest degree earned):**

Answer Options	Response Percent	Response Count
Some high school	0.0%	0
High School diploma	31.4%	16
Associate Arts (two-year community college)	11.8%	6
Technical Certificate	11.8%	6
Bachelor's Degree	25.5%	13
Master's Degree	13.7%	7
Ph.D./Ed.D.	0.0%	0
JD	2.0%	1
MD	0.0%	0
Other (please specify)	3.9%	2
<b>answered question</b>		<b>51</b>
<b>skipped question</b>		<b>3</b>

Number	Response Date	Other (please specify)	Categories
1	Jan 9, 2017 8:08 PM	Military tech	
2	Jan 6, 2017 7:51 PM	Some college and some by correspondence	

**Montana State Library Five-Year LSTA Evaluation Survey**

**Your Combined Household Income:**

Answer Options	Response Percent	Response Count
\$0 - \$25,000	11.0%	16
\$25,000 - \$50,000	30.3%	44
\$50,000 - \$75,000	26.2%	38

\$75,000 - \$100,000	15.2%	22
\$100,000+	17.2%	25
<i>answered question</i>		<b>145</b>

**Your Combined Household Income:**

Answer Options	Response Percent	Response Count
\$0 - \$25,000	17.4%	8
\$25,000 - \$50,000	32.6%	15
\$50,000 - \$75,000	17.4%	8
\$75,000 - \$100,000	8.7%	4
\$100,000+	23.9%	11
<i>answered question</i>		<b>46</b>

### Montana State Library Five-Year LSTA Evaluation Survey

**Do you have a computing device (computer, laptop, and/or tablet) at home?**

Answer Options	Response Percent	Response Count
Yes	92.4%	146
No	7.6%	12
Other (please specify)	0.0%	0
<i>answered question</i>		<b>158</b>

**Do you have a computing device (computer, laptop, and/or tablet) at home?**

Answer Options	Response Percent	Response Count
Yes	88.5%	46
No	11.5%	6
Other (please specify)	0.0%	0
<i>answered question</i>		<b>52</b>

### Montana State Library Five-Year LSTA Evaluation Survey

**Do you have access to the Internet at home and, if so, through what device(s) (check all that apply)?**

Answer Options	Response Percent	Response Count
Laptop computer	72.0%	113
Smartphone	65.0%	102
Tablet	54.8%	86
Desktop computer	42.0%	66
Cellphone (no web browsing)	15.9%	25
No, I do not have Internet access at home.	7.6%	12
Chromebook	5.7%	9
Other (please specify)	1.9%	3
<i>answered question</i>		<b>157</b>



<i>skipped question</i>				58
Number	Response Date	Other (please specify)	Categories	
1	Jan 11, 2017 9:08 PM	Kindle		
2	Oct 24, 2016 8:52 PM	very limited usage as we only have satellite no DSL		

Do you have access to the Internet at home and, if so, through what device(s) (check all that apply)?			
Answer Options	Response Percent	Response Count	
Laptop computer	68.6%	35	
Smartphone	54.9%	28	
Tablet	41.2%	21	
Desktop computer	39.2%	20	
Cellphone (no web browsing)	21.6%	11	
No, I do not have Internet access at home.	9.8%	5	
Chromebook	2.0%	1	
Other (please specify)	2.0%	1	
			<i>answered question</i>
			51
			<i>skipped question</i>
			3
Number	Other (please specify)	Categories	
1	Kindle		

Please rate the importance of the following library services to you over the past 12 months:			
Answer Options	Rating Average	Response Count	
1. Checking out printed books	5.95	152	
2. Library Website (e.g. to search for materials, place materials on hold, renew materials, use research resources, or manage your account online).	5.21	150	
3. Library Wi-Fi	5.16	152	
4. To use public meeting rooms for any purpose, including voting	5.03	153	
5. A place to socialize and attend community events	4.93	153	
6. A place to work or study	4.65	151	
7. Using reference materials, newspapers, magazines, or other periodicals	4.34	152	
8. A place to read	4.22	152	
9. Staff help with your computer or other digital device	4.08	151	
10. Programs or services designed for children 5 and under	3.96	152	
11. Downloading eBooks, music, or eAudio books	3.71	150	
12. Computer or Internet training classes or workshops	3.71	151	
13. Checking out movies on DVDs	3.66	151	
14. Downloading Audio books	3.45	150	
15. Programs or services to help find a job or create a resume	3.36	151	
16. Help with homework for school aged children or teens	3.32	151	
17. Checking out audio books or music on CDs	3.26	151	
Average		4.24	

Please rate the importance of the following library services to you over the past 12 months:		
Answer Options	Rating Average	Response Count
1. Checking out printed books	4.86	39
2. To use public meeting rooms for any purpose, including voting	4.06	39

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3. Using reference materials, newspapers, magazines, or other periodicals	3.53	38
4. A place to socialize and attend community events	3.53	39
5. Library Website (e.g. to search for materials, place materials on hold, renew materials, use research resources, or manage your account online).	3.47	37
6. Library Wi-Fi	3.41	39
7. A place to read	3.17	39
8. Computer or Internet training classes or workshops	3.09	39
Programs or services designed for children 5 and under	3.03	39
Staff help with your computer or other digital device	3.03	38
Checking out audio books or music on CDs	3.00	39
A place to work or study	3.00	38
Help with homework for school aged children or teens	2.57	39
Checking out movies on DVDs	2.56	38
Programs or services to help find a job or create a resume	2.08	38
Downloading Audio books	1.94	39
Downloading eBooks, music, or eAudio books	1.89	39
Average	3.07	

On a daily basis, how often do you use the following resources for accessing information?		
Answer Options	Rating Average	Response Count
1. Telephone (wired or cell)	4.61	155
2. Laptop computer	4.25	154
3. Smartphone texting	4.07	153
4. Desktop computer	3.89	154
5. Radio	3.83	157
6. Smartphone web browsing	3.76	153
7. Social Media (e.g. Facebook, Twitter, etc.)	3.73	156
8. Television	3.72	115
9. Smartphone mobile apps	3.68	155
10. Print magazines	3.57	154
11. Print newspaper	3.42	157
12. Tablet	3.22	152
13. Smartphone instant messaging (e.g. Instant messaging, Google Hangout, Facebook, Twitter, etc.)	3.16	152
14. Computer instant messaging (e.g. Google Hangout, Facebook, Twitter, etc.)	2.96	155
15. Tablet PC (e.g. Surface, iPad Air, etc.)	2.88	152
16. Cellphone (no web browsing)	2.39	149

On a daily basis, how often do you use the following resources for accessing information?		
Answer Options	Rating Average	Response Count
1. Telephone (wired or cell)	4.79	52
2. Laptop computer	4.06	52
3. Radio	3.92	52
4. Print newspaper	3.67	52
5. Print magazines	3.63	52

6. Smartphone texting	3.55	51
7. Smartphone web browsing	3.52	50
8. Desktop computer	3.27	51
Smartphone mobile apps	3.18	51
Social Media (e.g. Facebook, Twitter, etc.)	3.04	52
Smartphone instant messaging (e.g. Instant messaging, Google Hangout, Facebook, Twitter, etc.)	2.81	48
Tablet	2.80	51
Computer instant messaging (e.g. Google Hangout, Facebook, Twitter, etc.)	2.73	51
Tablet PC (e.g. Surface, iPad Air, etc.)	2.65	49
Cellphone (no web browsing)	2.58	50
Television	1.82	11
	3.25	

**How important are the following INFORMATION sources in your daily life?**

Answer Options	Rating Average	Response Count
1. Weather	5.76	169
2. Email	5.71	170
3. Local news	5.58	170
4. National news	5.31	169
5. World news	5.30	170
6. Desktop Computer	4.88	169
7. Community resources	4.87	167
8. General website surfing	4.82	169
9. Smartphone/Cell phone Telephone Calls	4.77	169
10. Laptop Computer	4.77	168
11. Smartphone/Cell phone Texting	4.68	170
12. Community events	4.66	170
13. Smartphone	4.53	169
14. Government resources	4.10	169
Facebook	3.73	169
Tablet Computer	3.69	167
Telephone over the Internet (Skype, Gmail talk, etc.)	3.49	165
Social Media in General (e.g. Youtube, Instagram, LinkedIn, Snapchat, etc.)	3.36	169
Video conferencing (Skype, Google Video, Facetime, etc.)	3.18	166
Sports	2.76	167
Movie reviews	2.49	168
Blogging in general	2.33	169
Hunting/Fishing Reports and Forecasts	2.31	166
Chromebook	1.88	168
Twitter	1.73	162
	4.03	

**How important are the following INFORMATION sources in your daily life?**

Answer Options	Rating Average	Response Count
1. Weather	5.88	52
2. Local news	5.75	52
3. World news	5.23	53
4. National news	5.13	53
5. Email	4.91	53

6. Smartphone/Cell phone Telephone Calls	4.72	53
7. General website surfing	4.23	53
8. Community resources	4.19	53
9. Laptop Computer	4.19	52
10. Smartphone/Cell phone Texting	4.06	53
11. Smartphone	4.00	53
12. Desktop Computer	3.96	53
13. Community events	3.89	53
14. Government resources	3.66	53
Telephone over the Internet (Skype, Gmail talk, etc.)	3.14	51
Tablet Computer	3.08	53
Sports	2.94	52
Facebook	2.89	53
Hunting/Fishing Reports and Forecasts	2.60	52
Social Media in General (e.g. Youtube, Instagram, LinkedIn, Snapchat, etc.)	2.48	52
Video conferencing (Skype, Google Video, Facetime, etc.)	2.37	52
Movie reviews	2.25	52
Blogging in general	1.92	53
Chromebook	1.74	53
Twitter	1.26	50
	3.62	

Answer Options	Rating Average	Response Count
1. Leisure reading	5.71	170
2. Email	5.15	169
3. Local news	5.09	169
4. National news	4.88	170
5. Smartphone/Cellphone	4.59	170
6. Outdoor leisure activities (bicycling, horseback riding, skiing, etc.)	4.57	168
7. Smartphone texting/instant messaging	4.32	168
8. Attending community events (sports, theater, etc)	4.32	167
9. Exercising/playing sports	4.26	166
10. General website surfing	4.20	169
11. Watching TV in general	3.91	169
12. Facebook	3.85	169
13. Smartphone Talking on the Phone	3.74	167
14. Watching movies via DVD	3.58	169
15. Smartphone web browsing	3.55	169
16. Playing traditional games (e.g. board games, cards, etc.)	3.54	169
17. Watching movies on TV	3.51	169
Listening to music on the Internet	3.36	168
Netflix	3.24	165
Amazon Prime or Other Internet Streaming Services	3.20	169
YouTube videos	3.05	168
Watching movies at the theater	3.02	169
Watching movies on the Internet	2.79	168
Video conferencing (Skype, Google Video, Facetime, etc.)	2.72	166
Smartphone listening to music/podcasts	2.72	165
Watching / Reading about sports	2.64	168
Smartphone playing games/using apps	2.50	168
Telephone over the Internet (Skype, Gmail talk, etc.)	2.48	165
Movie reviews	2.24	167

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Smartphone watching TV/videos/Movies, etc.	2.09	166
Redbox	1.65	168
Twitter	1.58	168
	3.50	

Answer Options	Rating Average	Response Count
7. Local news	5.25	53
8. Leisure reading	4.87	53
9. National news	4.70	53
10. Email	4.49	53
11. Outdoor leisure activities (bicycling, horseback riding, skiing, etc.)	4.23	53
12. Watching TV in general	4.19	53
13. Attending community events (sports, theater, etc)	4.06	53
14. Smartphone/Cellphone	3.98	53
15. Exercising/playing sports	3.92	52
16. Smartphone texting/instant messaging	3.62	53
17. General website surfing	3.62	53
18. Watching movies on TV	3.52	52
19. Smartphone Talking on the Phone	3.40	52
20. Smartphone web browsing	3.19	53
21. Facebook	3.15	52
Playing traditional games (e.g. board games, cards, etc.)	3.02	53
Watching movies via DVD	2.91	53
Watching / Reading about sports	2.88	52
Listening to music on the Internet	2.85	53
Watching movies at the theater	2.72	53
YouTube videos	2.49	53
Amazon Prime or Other Internet Streaming Services	2.43	53
Netflix	2.32	53
Telephone over the Internet (Skype, Gmail talk, etc.)	2.31	52
Video conferencing (Skype, Google Video, Facetime, etc.)	2.21	53
Smartphone playing games/using apps	2.11	53
Watching movies on the Internet	2.02	53
Smartphone listening to music/podcasts	1.74	53
Movie reviews	1.68	53
Redbox	1.64	53
Smartphone watching TV/videos/Movies, etc.	1.62	53
Twitter	1.21	53
	3.07	

**E3 - Montana Public Library Statistics (2006-2015)**

**Public Library Income**

Descriptives				
		N	Mean	Maximum
Income - City	2006	80	\$ 69,713.66	\$1,708,022.00
	2007	80	\$ 72,736.61	\$1,713,790.00
	2008	80	\$ 77,007.74	\$1,792,506.00
	2009	80	\$ 99,950.70	\$1,948,285.00
	2010	80	\$107,218.85	\$1,955,178.00
	2011	81	\$110,233.16	\$2,077,614.00
	2012	82	\$108,632.98	\$2,043,261.00
	2013	82	\$112,103.22	\$2,084,607.00
	2014	82	\$116,286.22	\$2,157,146.00
	2015	82	\$117,829.11	\$2,340,621.00
	Total	809	\$ 99,328.70	\$2,340,621.00
		Change	41%	
		N	Mean	Maximum
Income - County	2006	80	\$142,422.69	\$2,238,838.00
	2007	80	\$148,056.76	\$2,411,618.00
	2008	80	\$169,429.68	\$2,672,110.00
	2009	80	\$161,348.24	\$2,535,196.00
	2010	80	\$154,832.23	\$2,375,380.00
	2011	81	\$163,619.86	\$2,725,274.00
	2012	82	\$162,909.65	\$2,680,669.00
	2013	82	\$171,293.73	\$2,767,134.00
	2014	82	\$183,597.95	\$2,954,951.00
	2015	82	\$195,361.71	\$3,289,770.00
	Total	809	\$165,413.78	\$3,289,770.00
		Change	27%	
		N	Mean	Maximum
Income - State - Coal Severance Tax	2006	80	\$ 1,769.88	\$ 5,764.00
	2007	80	\$ 1,867.41	\$ 6,412.00
	2008	80	\$ 2,192.21	\$ 9,562.00
	2009	80	\$ 2,192.29	\$ 9,550.00
	2010	80	\$ 2,192.11	\$ 9,550.00
	2011	81	\$ 2,164.98	\$ 10,465.00
	2012	82	\$ 2,138.77	\$ 10,558.00
	2013	82	\$ 2,138.67	\$ 10,547.00
	2014	82	\$ 2,138.67	\$ 10,663.00
	2015	82	\$ 2,119.71	\$ 10,372.00
	Total	809	\$ 2,091.98	\$ 10,663.00
		Change	17%	
		N	Mean	Maximum
Income - State - Interlibrary Loan	2006	80	\$ 2,273.90	\$ 56,729.00

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	2007	80	\$ 1,937.99	\$ 60,690.00
	2008	80	\$ 2,133.69	\$ 59,015.00
	2009	80	\$ 2,125.85	\$ 56,950.00
	2010	80	\$ 2,185.29	\$ 51,390.00
	2011	81	\$ 2,182.65	\$ 45,754.00
	2012	82	\$ -	\$ -
	2013	82	\$ -	\$ -
	2014	82	\$ -	\$ -
	2015	82	\$ -	\$ -
	Total	809	\$ 1,272.35	\$ 60,690.00
		Change	#DIV/0!	
		N	Mean	Maximum
Income - State - Per Capita/Per Square Mile	2006	80	\$ 1,327.99	\$ 12,322.00
	2007	80	\$ 1,280.96	\$ 12,322.00
	2008	80	\$ 1,269.66	\$ 12,322.00
	2009	80	\$ 1,280.36	\$ 12,322.00
	2010	80	\$ 1,283.09	\$ 12,322.00
	2011	81	\$ 1,257.81	\$ 12,322.00
	2012	82	\$ 1,242.45	\$ 13,026.00
	2013	82	\$ 1,249.88	\$ 13,026.00
	2014	82	\$ 4,810.45	\$ 50,133.00
	2015	82	\$ 4,810.45	\$ 50,133.00
	Total	809	\$ 1,990.77	\$ 50,133.00
		Change	72%	
		N	Mean	Maximum
Income - State - Total	2006	80	\$ 5,680.94	\$ 69,103.00
	2007	80	\$ 5,086.36	\$ 72,881.00
	2008	80	\$ 5,595.56	\$ 75,087.00
	2009	80	\$ 5,598.43	\$ 73,055.00
	2010	80	\$ 5,660.49	\$ 67,518.00
	2011	81	\$ 5,605.62	\$ 65,876.00
	2012	82	\$ 3,381.11	\$ 20,696.00
	2013	82	\$ 3,388.48	\$ 20,685.00
	2014	82	\$ 6,949.13	\$ 51,663.00
	2015	82	\$ 6,930.13	\$ 51,688.00
	Total	809	\$ 5,385.67	\$ 75,087.00
		Change	18%	
		N	Mean	Maximum
Income - Federal	2006	80	\$ 220.54	\$ 9,967.00
	2007	80	\$ 311.23	\$ 10,976.00
	2008	80	\$ 485.21	\$ 20,992.00
	2009	80	\$ 1,647.13	\$ 96,687.00
	2010	80	\$ 328.64	\$ 20,000.00
	2011	81	\$ 3,053.68	\$ 89,634.00
	2012	82	\$ 2,162.78	\$ 88,759.00
	2013	82	\$ 1,316.46	\$ 36,620.00
	2014	82	\$ 144.27	\$ 4,908.00
	2015	82	\$ 238.18	\$ 17,000.00

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	Total	809	\$ 993.11	\$ 96,687.00
		Change	7%	
		N	Mean	Maximum
Income - Other	2006	80	\$ 24,116.66	\$ 481,946.00
	2007	80	\$ 22,620.80	\$ 436,408.00
	2008	80	\$ 28,540.20	\$ 594,803.00
	2009	80	\$ 21,020.03	\$ 377,736.00
	2010	80	\$ 27,781.74	\$ 552,142.00
	2011	81	\$ 20,647.84	\$ 289,362.00
	2012	82	\$ 20,884.66	\$ 270,426.00
	2013	82	\$ 20,326.78	\$ 238,731.00
	2014	82	\$ 23,527.48	\$ 224,773.00
	2015	82	\$ 21,503.11	\$ 258,656.00
	Total	809	\$ 23,078.71	\$ 594,803.00
		Change	-12%	
		N	Mean	Maximum
Income - Total	2006	80	\$242,154.49	\$2,692,752.00
	2007	80	\$248,811.76	\$2,679,169.00
	2008	80	\$281,058.39	\$2,986,056.00
	2009	80	\$289,564.51	\$2,981,711.00
	2010	80	\$295,821.94	\$3,146,422.00
	2011	81	\$303,160.16	\$3,048,759.00
	2012	82	\$297,971.17	\$3,015,300.00
	2013	82	\$308,428.67	\$3,068,898.00
	2014	82	\$330,505.05	\$3,333,206.00
	2015	82	\$341,862.24	\$3,459,592.00
	Total	809	\$294,199.96	\$3,459,592.00
		Change	29%	
		N	Mean	Maximum
Income - Per Capita (Service Population)	2006	80	\$ 26.02	\$ 199.45
	2007	80	\$ 25.67	\$ 97.84
	2008	80	\$ 27.52	\$ 93.80
	2009	80	\$ 29.58	\$ 103.53
	2010	80	\$ 31.78	\$ 106.94
	2011	81	\$ 29.79	\$ 101.68
	2012	82	\$ 29.77	\$ 124.47
	2013	82	\$ 31.51	\$ 124.90
	2014	82	\$ 33.68	\$ 136.85
	2015	82	\$ 34.01	\$ 120.27
	Total	809	\$ 29.95	\$ 199.45
		Change	23%	
		N	Mean	Maximum
Income - Per Capita (Census/Estimated Population)	2006	80	\$ 37.83	\$ 854.17
	2007	80	\$ 31.35	\$ 193.39
	2008	80	\$ 34.02	\$ 227.10
	2009	80	\$ 36.96	\$ 265.99



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	2010	80	\$ 38.79	\$ 414.71
	2011	81	\$ 30.03	\$ 102.30
	2012	82	\$ 30.19	\$ 125.09
	2013	82	\$ 42.87	\$ 564.85
	2014	82	\$ 46.43	\$ 557.44
	2015	82	\$ 44.65	\$ 402.23
	Total	809	\$ 37.34	\$ 854.17
		Change	15%	

Table 40 - Average Income Per Capita (Service Population) from 2006-2015

		N	Mean	Maximum
Income - Per Capita (Service Population)	2006	80	\$ 26.02	\$ 199.45
	2007	80	\$ 25.67	\$ 97.84
	2008	80	\$ 27.52	\$ 93.80
	2009	80	\$ 29.58	\$ 103.53
	2010	80	\$ 31.78	\$ 106.94
	2011	81	\$ 29.79	\$ 101.68
	2012	82	\$ 29.77	\$ 124.47
	2013	82	\$ 31.51	\$ 124.90
	2014	82	\$ 33.68	\$ 136.85
	2015	82	\$ 34.01	\$ 120.27
	Total	809	\$ 29.95	\$ 199.45
	Change		23%	

Table 41 - Average State Income Per Capita/Per Square Mile from 2006 to 2015

		N	Mean	Maximum
Income - State - Per Capita/Per Square Mile	2006	80	\$ 1,327.99	\$ 12,322.00
	2007	80	\$ 1,280.96	\$ 12,322.00
	2008	80	\$ 1,269.66	\$ 12,322.00
	2009	80	\$ 1,280.36	\$ 12,322.00
	2010	80	\$ 1,283.09	\$ 12,322.00
	2011	81	\$ 1,257.81	\$ 12,322.00
	2012	82	\$ 1,242.45	\$ 13,026.00
	2013	82	\$ 1,249.88	\$ 13,026.00
	2014	82	\$ 4,810.45	\$ 50,133.00
	2015	82	\$ 4,810.45	\$ 50,133.00
	Total	809	\$ 1,990.77	\$ 50,133.00
	Change		72%	

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Table 42 - Average Library City Income from 2006-2015

		N	Mean	Maximum
Income - City	2006	80	\$ 69,713.66	\$1,708,022.00
	2007	80	\$ 72,736.61	\$1,713,790.00
	2008	80	\$ 77,007.74	\$1,792,506.00
	2009	80	\$ 99,950.70	\$1,948,285.00
	2010	80	\$107,218.85	\$1,955,178.00
	2011	81	\$110,233.16	\$2,077,614.00
	2012	82	\$108,632.98	\$2,043,261.00
	2013	82	\$112,103.22	\$2,084,607.00
	2014	82	\$116,286.22	\$2,157,146.00
	2015	82	\$117,829.11	\$2,340,621.00
Total		809	\$ 99,328.70	\$2,340,621.00
Change			41%	

Table 43 - Average County Library Income from 2006 to 2015

		N	Mean	Maximum
Income - County	2006	80	\$142,422.69	\$2,238,838.00
	2007	80	\$148,056.76	\$2,411,618.00
	2008	80	\$169,429.68	\$2,672,110.00
	2009	80	\$161,348.24	\$2,535,196.00
	2010	80	\$154,832.23	\$2,375,380.00
	2011	81	\$163,619.86	\$2,725,274.00
	2012	82	\$162,909.65	\$2,680,669.00
	2013	82	\$171,293.73	\$2,767,134.00
	2014	82	\$183,597.95	\$2,954,951.00
	2015	82	\$195,361.71	\$3,289,770.00
Total		809	\$165,413.78	\$3,289,770.00
Change			27%	

Table 44 - Average State Library Income from 2006 to 2015

		N	Mean	Maximum
Income - State - Total	2006	80	\$ 5,680.94	\$ 69,103.00
	2007	80	\$ 5,086.36	\$ 72,881.00
	2008	80	\$ 5,595.56	\$ 75,087.00
	2009	80	\$ 5,598.43	\$ 73,055.00
	2010	80	\$ 5,660.49	\$ 67,518.00
	2011	81	\$ 5,605.62	\$ 65,876.00
	2012	82	\$ 3,381.11	\$ 20,696.00
	2013	82	\$ 3,388.48	\$ 20,685.00
	2014	82	\$ 6,949.13	\$ 51,663.00
	2015	82	\$ 6,930.13	\$ 51,688.00
Total		809	\$ 5,385.67	\$ 75,087.00
Change			18%	

**Public Library Capital**

Table 45 – Average Total Capital Revenue for Montana Public Libraries (2006-2015)

		N	Mean	Maximum
Capital Revenue - Total	2006	80	\$ 83,183.41	\$ 6,048,337.00
	2007	80	\$ 59,585.61	\$ 3,319,021.00
	2008	80	\$ 18,452.38	\$ 880,000.00
	2009	80	\$ 11,946.61	\$ 387,671.00
	2010	80	\$ 12,911.68	\$ 309,723.00
	2011	81	\$ 5,668.37	\$ 200,414.00
	2012	82	\$ 19,443.71	\$ 514,893.00
	2013	82	\$138,374.78	\$10,258,440.00
	2014	82	\$ 93,552.43	\$ 7,147,527.00
	2015	82	\$ 32,761.62	\$ 1,921,579.00
	Total	809	\$ 47,768.09	\$10,258,440.00

Table 46-Average Local Capital Revenue for Montana Public Libraries (2006-2015)

		N	Mean	Maximum
Capital Revenue - Local	2006	80	\$ 42,490.70	\$ 2,848,337.00
	2007	80	\$ 44,271.09	\$ 3,319,021.00
	2008	80	\$ 3,882.24	\$ 242,004.00
	2009	80	\$ 9,527.19	\$ 387,671.00
	2010	80	\$ 6,286.94	\$ 243,955.00
	2011	81	\$ 2,642.15	\$ 200,414.00
	2012	82	\$ 15,479.48	\$ 514,893.00
	2013	82	\$ -	\$ -
	2014	82	\$ 92,615.29	\$ 7,147,527.00
	2015	82	\$ 30,325.05	\$ 1,921,579.00
	Total	809	\$ 24,822.11	\$ 7,147,527.00

Descriptives				
		N	Mean	Maximum
Capital Expenditures - Collection	2006	80	\$ 3,819.69	\$ 266,127.00
	2007	80	\$ 37,333.89	\$ 2,939,000.00
	2008	80	\$ 473.74	\$ 16,163.00
	2009	80	\$ 398.51	\$ 17,640.00
	2010	80	\$ 866.96	\$ 26,803.00
	2011	81	\$ 4,510.15	\$ 331,327.00
	2012	82	\$ 4,193.99	\$ 315,236.00
	2013	82	\$ -	\$ -
	2014	82	\$ 369.83	\$ 23,539.00
	2015	82	\$ 235.46	\$ 14,508.00
	Total	809	\$ 5,179.59	\$ 2,939,000.00
		Change	-1522%	

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Capital Expenditures - Equipment	2006	80	\$ 2,720.81	\$ 57,318.00	
	2007	80	\$ 9,820.54	\$ 483,309.00	
	2008	80	\$ 2,185.83	\$ 64,735.00	
	2009	80	\$ 3,525.04	\$ 55,885.00	
	2010	80	\$ 5,034.80	\$ 157,500.00	
	2011	81	\$ 2,279.19	\$ 32,539.00	
	2012	82	\$ 2,985.80	\$ 49,715.00	
	2013	82	\$ -	\$ -	
	2014	82	\$ 30,607.37	\$ 2,414,215.00	
	2015	82	\$ 4,072.43	\$ 155,534.00	
	Total	809	\$ 6,348.77	\$ 2,414,215.00	
			Change	33%	
	Capital Expenditures - Building	2006	80	\$104,376.81	\$ 7,571,417.00
2007		80	\$ 43,603.41	\$ 2,657,679.00	
2008		80	\$ 22,635.33	\$ 880,000.00	
2009		80	\$ 9,218.05	\$ 387,671.00	
2010		80	\$ 17,074.25	\$ 302,234.00	
2011		81	\$ 4,854.16	\$ 150,000.00	
2012		82	\$ 8,655.30	\$ 506,170.00	
2013		82	\$ -	\$ -	
2014		82	\$ 59,873.15	\$ 4,733,312.00	
2015		82	\$ 35,538.21	\$ 1,908,128.00	
Total		809	\$ 30,505.91	\$ 7,571,417.00	
			Change	-194%	
Capital Expenditures - Other		2006	80	\$ 1,089.49	\$ 51,439.00
	2007	80	\$ 809.83	\$ 30,190.00	
	2008	80	\$ 1,818.16	\$ 102,640.00	
	2009	80	\$ 980.69	\$ 43,126.00	
	2010	80	\$ 2,659.63	\$ 100,000.00	
	2011	81	\$ 891.35	\$ 50,000.00	
	2012	82	\$ 2,461.52	\$ 118,793.00	
	2013	82	\$ -	\$ -	
	2014	82	\$ 1,943.99	\$ 118,386.00	
	2015	82	\$ 36.59	\$ 3,000.00	
	Total	809	\$ 1,267.09	\$ 118,793.00	
			Change	-2878%	
	Capital Expenditures - Total	2006	80	\$112,006.80	\$ 7,628,735.00
2007		80	\$ 91,567.66	\$ 3,319,021.00	
2008		80	\$ 27,113.05	\$ 891,455.00	
2009		80	\$ 14,122.29	\$ 392,401.00	
2010		80	\$ 25,635.64	\$ 533,337.00	
2011		81	\$ 12,534.84	\$ 427,823.00	
2012		82	\$ 18,296.62	\$ 514,893.00	
2013		82	\$ -	\$ -	
2014		82	\$ 92,794.33	\$ 7,147,527.00	
2015		82	\$ 39,882.68	\$ 1,921,579.00	
Total		809	\$ 43,301.35	\$ 7,628,735.00	
			Change	-181%	
Capital Revenue - Local		2006	80	\$ 42,490.70	\$ 2,848,337.00
	2007	80	\$ 44,271.09	\$ 3,319,021.00	
	2008	80	\$ 3,882.24	\$ 242,004.00	
	2009	80	\$ 9,527.19	\$ 387,671.00	
	2010	80	\$ 6,286.94	\$ 243,955.00	
	2011	81	\$ 2,642.15	\$ 200,414.00	

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	2012	82	\$ 15,479.48	\$ 514,893.00
	2013	82	\$ -	\$ -
	2014	82	\$ 92,615.29	\$ 7,147,527.00
	2015	82	\$ 30,325.05	\$ 1,921,579.00
	Total	809	\$ 24,822.11	\$ 7,147,527.00
		Change	-40%	
Capital Revenue - State	2006	80	\$ -	\$ -
	2007	80	\$ -	\$ -
	2008	80	\$ -	\$ -
	2009	80	\$ -	\$ -
	2010	80	\$ 93.61	\$ 7,489.00
	2011	81	\$ 195.70	\$ 15,852.00
	2012	82	\$ -	\$ -
	2013	82	\$ -	\$ -
	2014	82	\$ -	\$ -
	2015	82	\$ -	\$ -
	Total	809	\$ 28.85	\$ 15,852.00
			Change	#DIV/0!
Capital Revenue - Federal	2006	80	\$ 22.70	\$ 1,816.00
	2007	80	\$ -	\$ -
	2008	80	\$ -	\$ -
	2009	80	\$ -	\$ -
	2010	80	\$ 3,777.93	\$ 302,234.00
	2011	81	\$ -	\$ -
	2012	82	\$ -	\$ -
	2013	82	\$ -	\$ -
	2014	82	\$ -	\$ -
	2015	82	\$ -	\$ -
	Total	809	\$ 375.83	\$ 302,234.00
			Change	#DIV/0!
Capital Revenue - Other	2006	80	\$ 40,670.01	\$ 3,200,000.00
	2007	80	\$ 15,314.53	\$ 1,217,837.00
	2008	80	\$ 14,570.14	\$ 880,000.00
	2009	80	\$ 2,419.43	\$ 190,560.00
	2010	80	\$ 2,753.20	\$ 128,250.00
	2011	81	\$ 2,830.52	\$ 129,250.00
	2012	82	\$ 3,964.23	\$ 120,000.00
	2013	82	\$ 1,214.48	\$ 57,500.00
	2014	82	\$ 937.13	\$ 23,000.00
	2015	82	\$ 2,436.57	\$ 100,252.00
	Total	809	\$ 8,638.76	\$ 3,200,000.00
			Change	-1569%
Capital Revenue - Total	2006	80	\$ 83,183.41	\$ 6,048,337.00
	2007	80	\$ 59,585.61	\$ 3,319,021.00
	2008	80	\$ 18,452.38	\$ 880,000.00
	2009	80	\$ 11,946.61	\$ 387,671.00
	2010	80	\$ 12,911.68	\$ 309,723.00
	2011	81	\$ 5,668.37	\$ 200,414.00
	2012	82	\$ 19,443.71	\$ 514,893.00
	2013	82	\$138,374.78	\$10,258,440.00
	2014	82	\$ 93,552.43	\$ 7,147,527.00
	2015	82	\$ 32,761.62	\$ 1,921,579.00
	Total	809	\$ 47,768.09	\$10,258,440.00
			Change	-154%

## Registered Patrons and Service Hours

Table 47 - Average Registered Patrons from 2006 to 2015

		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Registered Borrowers	2006	80	4927.79	9452.79	2824.17	7031.4	0	51559
	2007	80	5302.35	9889.741	3101.5	7503.2	0	56519
	2008	80	5591.04	10488.51	3256.93	7925.14	0	58992
	2009	80	5528.89	10664.96	3155.52	7902.26	95	64545
	2010	80	5598.68	10833.06	3187.9	8009.45	87	63342
	2011	81	5769.17	12185.67	3074.7	8463.65	80	77000
	2012	82	5661.73	12179.6	2985.58	8337.88	87	75457
	2013	82	5880.66	12535.47	3126.31	8635	110	72700
	2014	82	5877.23	12356.69	3162.17	8592.3	98	77085
	2015	82	5622.99	11105.66	3182.81	8063.17	89	59581
	Total	809	5578.12	11167.77	4807.41	6348.83	0	77085
	Change		12%					

Table 48 - Average Percent of Service Population Registered from 2006 to 2015

		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Registered Borrowers - Percent Registered	2006	80	47.9334	26.80078	41.9692	53.8976	0	141.72
	2007	80	49.7538	23.64375	44.4921	55.0154	0	141.72
	2008	80	52.9619	22.13126	48.0368	57.8869	0	135.16
	2009	80	52.2343	21.56979	47.4341	57.0344	13.79	112.92
	2010	80	52.1694	22.75973	47.1044	57.2343	14.41	136.4
	2011	81	47.866	21.81235	43.0429	52.6892	14.87	146.3
	2012	82	47.7013	24.80967	42.2501	53.1526	15.17	160.24
	2013	82	49.484	25.7582	43.8243	55.1437	15.39	169.33
	2014	82	50.0117	26.70658	44.1436	55.8798	15.25	187.09
	2015	82	51.2639	29.29326	44.8275	57.7003	14	205.18
	Total	809	50.13	24.60037	48.4323	51.8277	0	205.18
	Change		6%					

Table 49 - Average Main Library Service Hours from 2006 to 2015

		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Main - Weekly Hours	2006	80	37.95	12.37	35.2	40.7	15	64
	2007	80	38.3	12.665	35.48	41.12	15	64
	2008	80	38.5	12.703	35.67	41.33	15	64
	2009	80	38.85	12.452	36.08	41.62	15	64
	2010	80	39.15	12.146	36.45	41.85	15	64
	2011	81	39.52	11.878	36.89	42.14	15	64
	2012	82	40.23	11.374	37.73	42.73	15	63

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	2013	82	40.45	11.327	37.96	42.94	15	63
	2014	82	40.02	11.487	37.5	42.55	15	63
	2015	82	40.22	11.334	37.73	42.71	15	63
	Total	809	39.33	11.943	38.5	40.15	15	64
	Change		6%					

Table 50 - Average Weekly Service Hours from 2006 to 2015

	N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum	
				Lower Bound	Upper Bound			
Service Hours - All - Weekly Hours	2006	80	46.49	27.393	40.39	52.58	15	179
	2007	80	46.6	27.206	40.55	52.65	15	179
	2008	80	47.69	28.143	41.42	53.95	15	179
	2009	80	48.21	27.974	41.99	54.44	15	179
	2010	80	48.59	28.221	42.31	54.87	15	179
	2011	81	50.16	29.776	43.58	56.74	15	169
	2012	82	50.78	29.847	44.22	57.34	15	181
	2013	82	51.87	32.785	44.66	59.07	15	221
	2014	82	51.73	32.218	44.65	58.81	15	213
	2015	82	51.76	31.818	44.76	58.75	15	213
Total	809	49.41	29.53	47.37	51.45	15	221	
Change		10%						

**Descriptives**

	N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum	
				Lower Bound	Upper Bound			
Registered Borrowers - Registered Borrowers	2006	80	4927.79	9452.79	2824.17	7031.4	0	51559
	2007	80	5302.35	9889.741	3101.5	7503.2	0	56519
	2008	80	5591.04	10488.51	3256.93	7925.14	0	58992
	2009	80	5528.89	10664.96	3155.52	7902.26	95	64545
	2010	80	5598.68	10833.06	3187.9	8009.45	87	63342
	2011	81	5769.17	12185.67	3074.7	8463.65	80	77000
	2012	82	5661.73	12179.6	2985.58	8337.88	87	75457
	2013	82	5880.66	12535.47	3126.31	8635	110	72700
	2014	82	5877.23	12356.69	3162.17	8592.3	98	77085
	2015	82	5622.99	11105.66	3182.81	8063.17	89	59581
Total	809	5578.12	11167.77	4807.41	6348.83	0	77085	
Change		12%						

	N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum	
				Lower Bound	Upper Bound			
Registered Borrowers - Percent Registered	2006	80	47.9334	26.80078	41.9692	53.8976	0	141.72
	2007	80	49.7538	23.64375	44.4921	55.0154	0	141.72
	2008	80	52.9619	22.13126	48.0368	57.8869	0	135.16
	2009	80	52.2343	21.56979	47.4341	57.0344	13.79	112.92
	2010	80	52.1694	22.75973	47.1044	57.2343	14.41	136.4
	2011	81	47.866	21.81235	43.0429	52.6892	14.87	146.3
	2012	82	47.7013	24.80967	42.2501	53.1526	15.17	160.24
	2013	82	49.484	25.7582	43.8243	55.1437	15.39	169.33

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	2014	82	50.0117	26.70658	44.1436	55.8798	15.25	187.09
	2015	82	51.2639	29.29326	44.8275	57.7003	14	205.18
	Total	809	50.13	24.60037	48.4323	51.8277	0	205.18
	Change		6%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Main - Weekly Hours	2006	80	37.95	12.37	35.2	40.7	15	64
	2007	80	38.3	12.665	35.48	41.12	15	64
	2008	80	38.5	12.703	35.67	41.33	15	64
	2009	80	38.85	12.452	36.08	41.62	15	64
	2010	80	39.15	12.146	36.45	41.85	15	64
	2011	81	39.52	11.878	36.89	42.14	15	64
	2012	82	40.23	11.374	37.73	42.73	15	63
	2013	82	40.45	11.327	37.96	42.94	15	63
	2014	82	40.02	11.487	37.5	42.55	15	63
	2015	82	40.22	11.334	37.73	42.71	15	63
	Total	809	39.33	11.943	38.5	40.15	15	64
	Change		6%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Branch - Weekly Hours	2006	80	7.4	20.444	2.85	11.95	0	126
	2007	80	7.16	19.925	2.73	11.6	0	126
	2008	80	8.08	20.942	3.41	12.74	0	126
	2009	80	8.18	21.19	3.46	12.89	0	126
	2010	80	8.26	21.496	3.48	13.05	0	126
	2011	81	8.99	21.486	4.24	13.74	0	116
	2012	82	9.09	21.932	4.27	13.9	0	120
	2013	82	9.66	24.788	4.21	15.1	0	160
	2014	82	9.17	22.041	4.33	14.01	0	120
	2015	82	8.96	21.699	4.2	13.73	0	120
	Total	809	8.5	21.533	7.02	9.99	0	160
	Change		17%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Bookmobile - Weekly Hours	2006	80	0.49	3.28	-0.24	1.22	0	28
	2007	80	0.49	3.28	-0.24	1.22	0	28
	2008	80	0.46	3.276	-0.27	1.19	0	28
	2009	80	0.54	3.315	-0.2	1.28	0	28
	2010	80	0.53	3.315	-0.21	1.26	0	28
	2011	81	0.52	3.294	-0.21	1.25	0	28
	2012	82	0.51	3.274	-0.21	1.23	0	28
	2013	82	0.71	3.693	-0.1	1.52	0	28
	2014	82	1.02	5.004	-0.08	2.12	0	32
	2015	82	1.06	5.007	-0.04	2.16	0	32
	Total	809	0.63	3.727	0.38	0.89	0	32
	Change		54%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum



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					Lower Bound	Upper Bound		
Service Hours - School - Weekly Hours	2006	80	0.65	4.653	-0.39	1.69	0	40
	2007	80	0.65	4.653	-0.39	1.69	0	40
	2008	80	0.65	4.653	-0.39	1.69	0	40
	2009	80	0.65	4.653	-0.39	1.69	0	40
	2010	80	0.65	4.653	-0.39	1.69	0	40
	2011	81	1.14	6.26	-0.25	2.52	0	40
	2012	82	0.95	6.055	-0.38	2.28	0	40
	2013	82	1.05	6.104	-0.29	2.39	0	40
	2014	82	1.51	7.34	-0.1	3.13	0	40
	2015	82	1.51	7.34	-0.1	3.13	0	40
	Total	809	0.94	5.726	0.55	1.34	0	40
		Change	57%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - All - Weekly Hours	2006	80	46.49	27.393	40.39	52.58	15	179
	2007	80	46.6	27.206	40.55	52.65	15	179
	2008	80	47.69	28.143	41.42	53.95	15	179
	2009	80	48.21	27.974	41.99	54.44	15	179
	2010	80	48.59	28.221	42.31	54.87	15	179
	2011	81	50.16	29.776	43.58	56.74	15	169
	2012	82	50.78	29.847	44.22	57.34	15	181
	2013	82	51.87	32.785	44.66	59.07	15	221
	2014	82	51.73	32.218	44.65	58.81	15	213
	2015	82	51.76	31.818	44.76	58.75	15	213
	Total	809	49.41	29.53	47.37	51.45	15	221
		Change	10%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Annual Hours Open	2006	80	2417.35	1424.439	2100.36	2734.34	780	9308
	2007	80	2423.2	1414.737	2108.37	2738.03	780	9308
	2008	80	2479.75	1463.424	2154.08	2805.42	780	9308
	2009	80	2507.05	1454.629	2183.34	2830.76	780	9308
	2010	80	2526.55	1467.513	2199.97	2853.13	780	9308
	2011	81	2608.35	1548.331	2265.98	2950.71	780	8788
	2012	82	2640.59	1552.02	2299.57	2981.6	780	9412
	2013	82	2697.02	1704.841	2322.43	3071.62	780	11492
	2014	82	2690.05	1675.357	2321.93	3058.17	780	11076
	2015	82	2691.32	1654.535	2327.78	3054.86	780	11076
	Total	809	2569.28	1535.572	2463.3	2675.25	780	11492
		Change	10%					

**Library Resources**

Descriptives					
		N	Mean	Minimum	Maximum
General - Number of Bookmobiles	2006	80	0.03	0	1

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	2007	80	0.03	0	1
	2008	80	0.03	0	1
	2009	80	0.03	0	1
	2010	80	0.03	0	1
	2011	81	0.02	0	1
	2012	82	0.02	0	1
	2013	82	0.05	0	1
	2014	82	0.05	0	1
	2015	82	0.06	0	1
	Total	809	0.03	0	1
	Change		50%		
		N	Mean	Minimum	Maximum
General - Number of Branches	2006	80	0.36	0	4
	2007	80	0.36	0	4
	2008	80	0.38	0	4
	2009	80	0.38	0	4
	2010	80	0.38	0	4
	2011	81	0.38	0	4
	2012	82	0.39	0	6
	2013	82	0.39	0	5
	2014	82	0.4	0	6
	2015	82	0.39	0	6
	Total	809	0.38	0	6
	Change		8%		
		N	Mean	Minimum	Maximum
General - Service Population	2006	80	11253.78	156	123097
	2007	80	11253.78	156	123097
	2008	80	11253.78	156	123097
	2009	80	11253.78	156	123097
	2010	80	11253.78	156	123097
	2011	81	12274.4	494	141254
	2012	82	12124.71	494	141254
	2013	82	12124.71	494	141254
	2014	82	12153.99	494	141254
	2015	82	12055.28	494	141254
	Total	809	11705	156	141254
	Change		7%		
		N	Mean	Minimum	Maximum
Census/Estimated Population	2006	80	11664.44	160	131963
	2007	80	11798.38	159	133689
	2008	80	11931.61	155	136128
	2009	80	12017.24	151	138223
	2010	80	12197.69	161	141254
	2011	81	12225.59	491	143256
	2012	82	11965.93	492	139516
	2013	82	12239.22	158	144986
	2014	82	12160.77	166	143339
	2015	82	12255.15	163	145066

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	Total	809	12046.91	151	145066
	Change	5%			
	N	Mean	Minimum	Maximum	
General - Square Footage of Library	2006	80	8063.38	450	66000
	2007	80	8492.85	500	66000
	2008	80	8588.08	500	68000
	2009	80	8605.2	500	68000
	2010	80	8670.14	500	68000
	2011	81	8586.19	500	68000
	2012	82	8629.65	500	68000
	2013	82	8626.51	500	68000
	2014	82	8636.39	500	68000
	2015	82	8670.13	500	68000
	Total	809	8557.72	450	68000
	Change	7%			

**Programs and Attendance**

Descriptives								
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
				Lower Bound	Upper Bound			
					Change			59%
Programs - Adult	2006	80	20.79	12.8	28.78	0	229	
	2007	80	22.34	14.07	30.61	0	222	
	2008	80	24.18	15.96	32.39	0	214	
	2009	80	31.38	20.93	41.82	0	226	
	2010	80	42.2	20.18	64.22	0	786	
	2011	81	36.47	24.65	48.29	0	298	
	2012	82	40.54	26.26	54.81	0	361	
	2013	82	67.99	17.99	117.98	0	2028	
	2014	82	46.15	31.29	61	0	414	
	2015	82	50.96	34.3	67.63	0	462	
	Total	809	38.43	31.99	44.86	0	2028	
	Programs - Children	2006	80	76.48	55.65	97.3	0	372
		2007	80	78.38	56.51	100.24	1	431
2008		80	82.3	59.82	104.78	1	451	
2009		80	93.09	67.86	118.32	0	493	
2010		80	102.4	73.73	131.07	0	618	
2011		81	108.35	77.79	138.91	1	695	
2012		82	115.82	85.13	146.51	1	667	
2013		82	123.5	75.89	171.11	0	1716	
2014		82	114.01	85.25	142.77	0	682	
2015		82	131.39	95.19	167.59	0	792	
Total		809	102.76	93.25	112.28	0	1716	
		Change	42%					

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		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs - Young Adult	2006	80	4.1	2.49	5.71	0	37
	2007	80	5.2	3.27	7.13	0	41
	2008	80	8.89	4.34	13.44	0	147
	2009	80	11.18	5.97	16.38	0	164
	2010	80	12.63	6.64	18.61	0	178
	2011	81	13.84	7.5	20.18	0	173
	2012	82	15.8	7.65	23.96	0	260
	2013	82	15.2	7.87	22.52	0	208
	2014	82	14.6	8.76	20.44	0	183
	2015	82	19.9	8.75	31.05	0	362
	Total	809	12.18	10.15	14.2	0	362
Change			79%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs - Total	2006	80	101.36	73.23	129.49	0	600
	2007	80	105.91	76.16	135.67	1	544
	2008	80	115.36	83.01	147.71	1	690
	2009	80	135.64	99.32	171.96	0	678
	2010	80	157.23	113.11	201.34	0	857
	2011	81	158.65	116.56	200.75	1	793
	2012	82	172.16	128.12	216.2	1	849
	2013	82	206.68	105.67	307.7	0	3952
	2014	82	174.76	129.56	219.95	0	985
	2015	82	202.26	143.81	260.71	0	1350
	Total	809	153.36	137.44	169.29	0	3952
Change			50%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Adult	2006	80	468.03	288.15	647.9	0	4333
	2007	80	630.71	353.36	908.06	0	8572
	2008	80	671.01	344.37	997.66	0	11069
	2009	80	799.26	390.45	1208.07	0	14310
	2010	80	832.68	330.34	1335.01	0	18705
	2011	81	908.09	399.7	1416.47	0	17996
	2012	82	968.94	441.92	1495.96	0	18658
	2013	82	1050.63	433.48	1667.79	0	17391
	2014	82	994.76	482.27	1507.25	0	17500
	2015	82	997.38	536.19	1458.57	0	15036
	Total	809	833.93	693.09	974.77	0	18705
Change			53%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
	2006	80	1870.69	1196.19	2545.19	0	14832

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Programs Attendance - Children	2007	80	1905.18	1197.43	2612.92	5	14683
	2008	80	1982.81	1240.83	2724.79	0	15926
	2009	80	2124.91	1340.82	2909.01	0	18419
	2010	80	2064.94	1253.74	2876.13	0	20567
	2011	81	2120.65	1329.47	2911.84	5	19866
	2012	82	2242.26	1424.26	3060.25	6	18302
	2013	82	2359.22	1401.82	3316.62	0	28000
	2014	82	2530.57	1638.79	3422.35	0	18588
	2015	82	2578.83	1604.39	3553.26	0	24418
	Total	809	2180.4	1924.73	2436.08	0	28000
		Change	27%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Young Adult	2006	80	109.98	36.74	183.21	0	2577
	2007	80	163.19	59.6	266.78	0	3250
	2008	80	217.83	72.12	363.53	0	4456
	2009	80	257.81	101.7	413.93	0	4692
	2010	80	262.05	69.83	454.27	0	7148
	2011	81	285.83	57.34	514.31	0	8798
	2012	82	271.74	20.93	522.56	0	10117
	2013	82	262.35	33.53	491.18	0	9160
	2014	82	258.15	62.09	454.2	0	7762
	2015	82	250.5	37.45	463.55	0	8303
Total	809	234.27	175.85	292.69	0	10117	
		Change	56%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Total	2006	80	2448.69	1606.35	3291.02	0	17581
	2007	80	2699.08	1710.1	3688.05	5	22679
	2008	80	2871.65	1781.82	3961.48	0	29304
	2009	80	3181.99	1987.11	4376.87	0	31088
	2010	80	3159.66	1802.29	4517.04	0	41260
	2011	81	3314.57	1926.3	4702.84	5	42803
	2012	82	3482.94	2021.2	4944.68	6	45787
	2013	82	3672.21	2043.41	5301	0	43425
	2014	82	3783.48	2338.39	5228.56	0	35584
	2015	82	3826.71	2347.59	5305.83	0	31857
Total	809	3248.61	2840	3657.21	0	45787	
		Change	36%				

**Circulation**

Table 51 - Average Circulation from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Circulation - Total	2006	80	68411.98	34900.15	101923.8	257	905836
	2007	80	70078.13	35277.84	104878.41	649	946884
	2008	80	72901.06	36825.86	108976.27	690	951537
	2009	80	78051.45	39165.58	116937.32	650	979928

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	2010	80	84402.49	40035.58	128769.4	658	1205188
	2011	81	92827.4	33345.2	152309.59	900	2045346
	2012	82	91894.52	32197.93	151591.12	1094	2151460
	2013	82	76314.8	36002.99	116626.62	1252	1148006
	2014	82	72459.24	36676.92	108241.57	426	814233
	2015	82	74068.66	36085.6	112051.71	512	943285
	Total	809	78164.5	64762.9	91566.1	257	2151460
	Change		8%				

Descriptives							
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Juvenile - Annual	2006	80	22824.81	10951.08	34698.55	0	307161
	2007	80	23719.86	11106.78	36332.95	0	322794
	2008	80	23093.53	10845.59	35341.46	0	322858
	2009	80	25381.78	11580.87	39182.68	0	338926
	2010	80	25810.84	12011.27	39610.41	0	318320
	2011	81	25910.88	11722.75	40099	0	326088
	2012	82	25028.17	12122.3	37934.04	-1	290908
	2013	82	24904.65	11582.94	38226.36	0	311219
	2014	82	25807.89	11761.56	39854.22	0	312584
	2015	82	25933.41	11738.25	40128.58	0	320902
	Total	809	24848.61	20712.53	28984.69	-1	338926
	Change		12%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Non-juvenile - Annual	2006	80	45587.16	23858.22	67316.1	153	598675
	2007	80	46358.26	24064.31	68652.22	250	624090
	2008	80	49807.54	25655.51	73959.56	265	628679
	2009	80	52669.68	27450.45	77888.9	250	641002
	2010	80	58591.65	27525.12	89658.18	178	920827
	2011	81	66916.52	19694.23	114138.81	588	1746477
	2012	82	66866.35	17603.47	116129.24	679	1895584
	2013	82	51410.16	24094.85	78725.47	725	836787
	2014	82	46651.35	24791.6	68511.1	0	501649
	2015	82	48135.24	24183.36	72087.13	0	625244
	Total	809	53315.89	43660.83	62970.96	0	1895584
	Change		5%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Total	2006	80	68411.98	34900.15	101923.8	257	905836
	2007	80	70078.13	35277.84	104878.41	649	946884
	2008	80	72901.06	36825.86	108976.27	690	951537
	2009	80	78051.45	39165.58	116937.32	650	979928
	2010	80	84402.49	40035.58	128769.4	658	1205188
	2011	81	92827.4	33345.2	152309.59	900	2045346

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	2012	82	91894.52	32197.93	151591.12	1094	2151460
	2013	82	76314.8	36002.99	116626.62	1252	1148006
	2014	82	72459.24	36676.92	108241.57	426	814233
	2015	82	74068.66	36085.6	112051.71	512	943285
	Total	809	78164.5	64762.9	91566.1	257	2151460
	Change		8%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Per Capita (Service Population)	2006	80	6.2776	5.283	7.2722	1.33	29.08
	2007	80	6.0115	5.0656	6.9574	0.38	34.21
	2008	80	6.3279	5.3966	7.2592	0.4	31.36
	2009	80	6.5946	5.6971	7.4922	0.38	26.56
	2010	80	6.937	5.7761	8.0979	0.38	35.32
	2011	81	6.4637	5.3829	7.5445	1.62	34.67
	2012	82	6.4121	5.3807	7.4435	1.78	37.3
	2013	82	6.023	5.0523	6.9938	1.91	36.03
	2014	82	5.9749	4.9173	7.0325	0.86	37.89
	2015	82	6.1645	4.9837	7.3453	1.03	41.91
	Total	809	6.3171	5.997	6.6372	0.38	41.91
	Change		-2%				
Circulation - Per Capita (Census/Estimated Population)	2006	80	8.5757	4.9463	12.2052	0.52	124.52
	2007	80	8.0849	4.4074	11.7623	0.52	146.93
	2008	80	8.2416	4.768	11.7153	0.56	138.56
	2009	80	8.5297	5.3603	11.6992	0.52	120.66
	2010	80	8.9859	5.0909	12.8809	0.49	150.3
	2011	81	6.502	5.4145	7.5895	1.51	34.82
	2012	82	6.4852	5.449	7.5215	1.44	37.49
	2013	82	8.2785	4.298	12.259	0.97	162.95
	2014	82	8.258	4.2596	12.2565	0.87	162.48
	2015	82	8.5459	4.0536	13.0381	1.03	183.39
	Total	809	8.0453	6.977	9.1135	0.49	183.39
	Change		0%				
Circulation - Electronic	2006	0	.	.	.	.	.
	2007	0	.	.	.	.	.
	2008	0	.	.	.	.	.
	2009	0	.	.	.	.	.
	2010	0	.	.	.	.	.
	2011	0	.	.	.	.	.
	2012	0	.	.	.	.	.
	2013	82	3,982.01	1765.17	6198.85	0	5,9451
	2014	82	9,566.8	256.62	18876.99	0	37,4769
	2015	82	7,362.88	3534.68	11191.07	0	9,4329
	Total	246	6,970.57	3570.79	10370.34	0	37,4769
	Change		46%				
Laptop/Device Checkout – Annually	2006	0	.	.	.	.	.
	2007	0	.	.	.	.	.
	2008	0	.	.	.	.	.
	2009	0	.	.	.	.	.
	2010	0	.	.	.	.	.
	2011	0	.	.	.	.	.
	2012	0	.	.	.	.	.

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	2013	0	.	.	.	.	.
	2014	82	163.45	12.15	314.75	0	5250
	2015	82	108.46	7.12	209.81	0	3600
	Total	164	135.96	45.77	226.14	0	5250
	Change		-51%				

**Library Automation**

**Descriptives**

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum	
					Lower Bound	Upper Bound			
					Automation - Number of Internet Computers	2006			80
	2007	80	10.70	12.345	1.380	7.95	13.45	0	69
	2008	80	11.86	13.093	1.464	8.95	14.78	1	69
	2009	80	12.53	13.311	1.488	9.56	15.49	1	69
	2010	80	13.75	15.067	1.685	10.40	17.10	1	76
	2011	81	15.10	16.628	1.848	11.42	18.78	1	85
	2012	82	15.56	16.271	1.797	11.99	19.14	1	93
	2013	82	15.28	16.075	1.775	11.75	18.81	1	99
	2014	82	16.55	18.941	2.092	12.39	20.71	1	108
	2015	82	16.44	19.046	2.103	12.25	20.62	2	113
	Total	809	13.81	15.546	.547	12.74	14.89	0	113
Automation - Online Full Text Databases	2006	80	8.26	9.385	1.049	6.17	10.35	0	66
	2007	80	9.93	12.104	1.353	7.23	12.62	0	69
	2008	80	10.66	11.735	1.312	8.05	13.27	0	69
	2009	80	10.58	11.262	1.259	8.07	13.08	0	69
	2010	80	12.63	14.216	1.589	9.46	15.79	0	76
	2011	81	13.38	15.895	1.766	9.87	16.90	0	85
	2012	82	13.84	15.007	1.657	10.54	17.14	0	93
	2013	82	.00	.000	.000	.00	.00	0	0
	2014	82	.00	.000	.000	.00	.00	0	0
	2015	82	.00	.000	.000	.00	.00	0	0
	Total	809	7.89	12.076	.425	7.06	8.72	0	93
Public Internet Computer Users - Weekly	2006	80	256.50	489.456	54.723	147.58	365.42	3	3060
	2007	80	314.43	570.843	63.822	187.39	441.46	2	3011
	2008	80	309.06	571.863	63.936	181.80	436.32	3	3260
	2009	80	323.79	601.946	67.300	189.83	457.74	4	3618
	2010	80	326.63	581.776	65.045	197.16	456.09	4	3155



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	2011	81	323.31	566.357	62.929	198.08	448.54	2	3250
	2012	82	370.46	707.898	78.174	214.92	526.01	3	4328
	2013	82	347.91	690.498	76.253	196.20	499.63	0	4400
	2014	82	448.37	1264.987	139.694	170.42	726.31	0	10098
	2015	82	271.23	418.650	46.232	179.24	363.22	0	2350
	Total	809	329.46	682.741	24.004	282.34	376.58	0	10098
Public Internet Computer Users - Yearly	2006	80	13338.00	25451.699	2845.586	7674.00	19002.00	156	159120
	2007	80	16350.10	29683.854	3318.756	9744.28	22955.92	104	156572
	2008	80	16071.25	29736.866	3324.683	9453.63	22688.87	156	169520
	2009	80	16836.95	31301.207	3499.581	9871.21	23802.69	208	188136
	2010	80	16984.50	30252.371	3382.318	10252.16	23716.84	208	164060
	2011	81	16812.05	29450.580	3272.287	10299.99	23324.11	104	169000
	2012	82	19264.10	36810.697	4065.061	11175.90	27352.29	156	225056
	2013	82	18091.56	35905.890	3965.142	10202.17	25980.95	0	228800
	2014	82	23315.02	65779.323	7264.111	8861.72	37768.33	0	525096
	2015	82	14104.05	21769.788	2404.071	9320.70	18887.40	0	122200
	Total	809	17131.98	35502.551	1248.203	14681.87	19582.08	0	525096
Automation - Internet Terminals - Public	2006	80	9.13	10.443	1.168	6.80	11.45	1	66
	2007	80	9.78	11.536	1.290	7.21	12.34	1	69
	2008	80	10.69	11.362	1.270	8.16	13.22	1	69
	2009	80	11.20	11.571	1.294	8.63	13.77	1	69
	2010	80	12.58	14.243	1.592	9.41	15.74	1	76
	2011	81	14.14	15.773	1.753	10.65	17.62	1	85
	2012	82	15.22	15.954	1.762	11.71	18.72	1	93
	2013	82	14.54	15.237	1.683	11.19	17.88	0	99
	2014	82	15.63	18.411	2.033	11.59	19.68	1	108
	2015	82	15.71	18.790	2.075	11.58	19.84	2	113
	Total	809	12.89	14.755	.519	11.87	13.90	0	113
Automation - Internet Terminals - Staff	2006	80	5.48	7.956	.889	3.70	7.25	1	45
	2007	80	5.81	8.735	.977	3.87	7.76	0	47
	2008	80	5.91	8.054	.900	4.12	7.70	0	36
	2009	80	6.34	9.142	1.022	4.30	8.37	0	51
	2010	80	6.61	8.987	1.005	4.61	8.61	1	45
	2011	81	6.54	8.853	.984	4.59	8.50	1	41
	2012	82	7.07	8.977	.991	5.10	9.05	1	39
	2013	82	6.82	8.481	.937	4.95	8.68	0	37
	2014	82	6.83	9.084	1.003	4.83	8.83	1	49

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2015	82	7.49	11.610	1.282	4.94	10.04	1	64
Total	809	6.50	9.013	.317	5.87	7.12	0	64

**Wired and Wireless**

Descriptives							
	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
			2006	80			
2007	80	0	0	0	0	0	0
2008	80	0	0	0	0	0	0
2009	80	0	0	0	0	0	0
2010	80	0	0	0	0	0	0
2011	81	0	0	0	0	0	0
2012	82	0	0	0	0	0	0
2013	82	7.71	3.36	12.05	0	100	
2014	82	20.28	-4.17	44.73	0	1000	
2015	82	20.51	-3.88	44.9	0	1000	
Total	809	4.92	1.41	8.42	0	1000	
	Change	62%					
	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
			2006	80			
2007	80	0	0	0	0	0	0
2008	80	0	0	0	0	0	0
2009	80	0	0	0	0	0	0
2010	80	0	0	0	0	0	0
2011	81	0	0	0	0	0	0
2012	82	0	0	0	0	0	0
2013	82	6.88	2.65	11.1	0	100	
2014	82	20.01	-4.44	44.47	0	1000	
2015	82	19.48	-4.91	43.86	0	1000	
Total	809	4.7	1.2	8.2	0	1000	
	Change	65%					
	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
			2006	80			
2007	80	0	0	0	0	0	0
2008	80	0	0	0	0	0	0
2009	80	0	0	0	0	0	0
2010	80	0	0	0	0	0	0
2011	81	0	0	0	0	0	0
2012	82	0	0	0	0	0	0
2013	82	11.62	7.26	15.99	0	100	
2014	82	23.62	-0.67	47.91	0	1000	
2015	82	28.5	4.16	52.84	0	1000	
Total	809	6.46	2.94	9.98	0	1000	
	Change	59%					
	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	

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				Lower Bound	Upper Bound		
Patron Download Wireless	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	11.44	7.07	15.8	0	100
	2014	82	22.71	-1.6	47.01	0	1000
	2015	82	25.32	1.02	49.61	0	1000
	Total	809	6.03	2.52	9.54	0	1000
		Change	55%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Upload Wired	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	18.85	-5.53	43.24	0	1000
	2014	82	20.45	-3.99	44.9	0	1000
	2015	82	21.57	-2.89	46.04	0	1000
	Total	809	6.17	1.91	10.43	0	1000
		Change	13%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Upload Wireless	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	17.73	-6.66	42.12	0	1000
	2014	82	20.06	-4.39	44.52	0	1000
	2015	82	20.67	-3.79	45.13	0	1000
	Total	809	5.93	1.67	10.18	0	1000
		Change	14%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Download Wired	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	22.34	-1.97	46.65	0	1000

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	2014	82	23.26	-1.04	47.55	0	1000
	2015	82	29.13	4.72	53.54	0	1000
	Total	809	7.57	3.31	11.84	0	1000
	Change		23%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Download Wireless	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	21.8	-2.52	46.13	0	1000
	2014	82	22.13	-2.18	46.45	0	1000
	2015	82	25.84	1.48	50.2	0	1000
	Total	809	7.07	2.82	11.33	0	1000
	Change		16%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Wireless Sessions – Annually	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	0	0	0	0	0
	2014	82	2686.07	664.75	4707.4	0	67942
	2015	82	3477.74	1166.31	5789.18	0	61344
	Total	809	624.76	307.41	942.12	0	67942
	Change		23%				

**Interlibrary Loans**

Descriptives							
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Loans - In State	2006	80	1083.04	168.13	1997.94	0	29848
	2007	80	1377.65	198.02	2557.28	0	37109
	2008	80	1314.46	336.46	2292.46	0	33059
	2009	80	2059.46	523.33	3595.59	0	48722
	2010	80	2607.48	704.16	4510.79	0	61498
	2011	81	2295.8	382.37	4209.24	0	59124
	2012	82	2298.96	380.26	4217.67	0	56317
	2013	82	2843.72	685.24	5002.2	-1	66599
	2014	82	2609.48	490.43	4728.52	0	65927
	2015	82	2707.04	545.11	4868.96	0	68508
	Total	809	2124.82	1580.42	2669.22	-1	68508
	Change		60%				

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		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Loans - Out of State	2006	80	58.35	27.35	89.35	0	787
	2007	80	63.38	27.09	99.66	0	957
	2008	80	70.3	33.43	107.17	0	946
	2009	80	69.85	35	104.7	0	921
	2010	80	72.03	31.84	112.21	0	1445
	2011	81	65.95	27.04	104.86	0	1240
	2012	82	77.51	31.63	123.39	0	1396
	2013	82	83.06	28.21	137.91	-1	1991
	2014	82	71.45	33.76	109.14	0	1143
	2015	82	73.6	37.16	110.04	0	1199
	Total	809	70.6	58.22	82.98	-1	1991
	Change		21%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Loans - Total	2006	80	1141.39	205.09	2077.69	0	30635
	2007	80	1441.03	236.64	2645.41	0	38066
	2008	80	1384.76	382.7	2386.82	0	34005
	2009	80	2129.31	572.45	3686.18	0	49522
	2010	80	2679.5	763.93	4595.07	0	61870
	2011	81	2361.75	422.45	4301.05	0	60364
	2012	82	2376.48	429.16	4323.79	0	57713
	2013	82	2926.78	728.71	5124.85	-2	68590
	2014	82	2680.93	541.35	4820.51	0	66803
	2015	82	2780.63	591.87	4969.4	0	69707
	Total	809	2195.42	1643.52	2747.33	-2	69707
	Change		59%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Borrows - In State	2006	80	1106.01	192.44	2019.59	0	27721
	2007	80	1258.53	134.87	2382.18	0	37038
	2008	80	1568.74	114.55	3022.92	0	43109
	2009	80	2020.66	314.7	3726.62	0	55035
	2010	80	2563.73	484.13	4643.32	0	61814
	2011	81	2225.11	90.48	4359.74	0	67046
	2012	82	2301.01	223.17	4378.85	0	64900
	2013	82	2668	417.6	4918.4	-1	65215
	2014	82	2691.38	430.76	4951.99	0	64701
	2015	82	2723.33	399.79	5046.87	0	68727
	Total	809	2117.57	1526.08	2709.06	-1	68727
	Change		59%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
	2006	80	873.94	-571.16	2319.03	0	58172

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Interlibrary Loans - Borrows - Out of State	2007	80	159.23	91.07	227.38	0	1619
	2008	80	162.15	77.86	246.44	0	2417
	2009	80	167.56	91.69	243.44	0	1775
	2010	80	124.26	71.9	176.63	0	1445
	2011	81	154.35	68.03	240.67	0	2511
	2012	82	127.83	72.39	183.27	0	1168
	2013	82	120.77	63.41	178.13	-1	1295
	2014	82	129.88	66.34	193.41	0	1570
	2015	82	120.66	61.71	179.61	0	1401
	Total	809	213.11	70.75	355.46	-1	58172
		Change	-624%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Total	2006	80	1979.95	270.14	3689.76	0	58344
	2007	80	1417.75	258.48	2577.02	0	37526
	2008	80	1730.89	231.57	3230.2	0	44645
	2009	80	2188.23	440.5	3935.95	0	55593
	2010	80	2687.99	597.76	4778.21	0	62289
	2011	81	2379.46	208.04	4550.87	0	67490
	2012	82	2428.84	326.51	4531.18	0	65313
	2013	82	2788.77	515.18	5062.36	-2	65523
	2014	82	2821.26	535.83	5106.68	0	65549
	2015	82	2843.99	492.41	5195.57	0	69910
Total	809	2330.67	1715.25	2946.1	-2	69910	
		Change	30%				

**E4 - Statistically Significant Correlations Between Inputs, Outputs, and Quality-of-Life (2006-2015)**

Table 52 - Library Income Per Capita Significantly Correlated to Library Outputs

		Income - Per Capita (Service Population)	Income - Per Capita (Census/Estimated Population)
Circulation - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.523**</b>	<b>.533**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Circulation - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.468**</b>	<b>.808**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.596**</b>	<b>.390**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.507**</b>	<b>.779**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.904**</b>	<b>.582**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.606**</b>	<b>.902**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	<b>Pearson Correlation</b>	<b>.520**</b>	<b>.562**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.511**</b>	<b>.547**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.417**</b>	<b>.750**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809

Table 53 - Service Hours and Statistically Significantly Correlated Library Inputs and Outputs

		Service Hours - Main - Weekly Hours	Service Hours - Branch - Weekly Hours	Service Hours - Bookmobile - Weekly Hours
Automation - Number of Internet Computers	<b>Pearson Correlation</b>	<b>.564**</b>	<b>.624**</b>	<b>.491**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Online Full Text Databases	<b>Pearson Correlation</b>	<b>.388**</b>	<b>.447**</b>	<b>.140**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Weekly	<b>Pearson Correlation</b>	<b>.450**</b>	<b>.544**</b>	<b>.347**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Yearly	<b>Pearson Correlation</b>	<b>.450**</b>	<b>.544**</b>	<b>.347**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Internet Terminals - Public	<b>Pearson Correlation</b>	<b>.530**</b>	<b>.628**</b>	<b>.417**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809

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Automation - Internet Terminals - Staff	Pearson Correlation	<b>.598**</b>	<b>.592**</b>	<b>.522**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Wireless Sessions – Annually	Pearson Correlation		<b>.313**</b>	<b>.440**</b>
	Sig. (2-tailed)		.000	.000
	N		809	809
Circulation - Juvenile - Annual	Pearson Correlation	<b>.518**</b>	<b>.523**</b>	<b>.631**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Non-juvenile - Annual	Pearson Correlation	<b>.459**</b>	<b>.547**</b>	<b>.486**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Total	Pearson Correlation	<b>.491**</b>	<b>.556**</b>	<b>.545**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Electronic	Pearson Correlation	<b>.345**</b>	<b>.544**</b>	<b>.712**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	246	246	246
Collection - Print	Pearson Correlation	<b>.588**</b>	<b>.584**</b>	<b>.631**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Print Serials	Pearson Correlation	<b>.596**</b>	<b>.585**</b>	<b>.451**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Audios	Pearson Correlation	<b>.509**</b>	<b>.294**</b>	<b>.732**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	320	320	320
Audios - Physical Units	Pearson Correlation	<b>.523**</b>	<b>.589**</b>	<b>.638**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	489	489	489
Income - County	Pearson Correlation	<b>.441**</b>	<b>.752**</b>	<b>.333**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Per Capita/Per Square Mile	Pearson Correlation	<b>.424**</b>	<b>.467**</b>	<b>.665**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Total	Pearson Correlation	<b>.424**</b>	<b>.547**</b>	<b>.368**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Programs - Program Attendance - Total	Pearson Correlation	<b>.552**</b>	<b>.555**</b>	<b>.467**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total FTE w/MLS	Pearson Correlation	<b>.505**</b>	<b>.539**</b>	<b>.543**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total Paid Staff	Pearson Correlation	<b>.584**</b>	<b>.667**</b>	<b>.522**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	164	164	164
Visits - Weekly	Pearson Correlation	<b>.572**</b>	<b>.638**</b>	<b>.481**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Visits - Yearly	Pearson Correlation	<b>.572**</b>	<b>.638**</b>	<b>.481**</b>
	Sig. (2-tailed)	.000	.000	.000



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Table 54 - Statistically Significant Correlations to Annual Visits Per Capita

		Visits - Annual Per Capita (Service Population)	Visits - Annual Per Capita (Census/Estimated Population)
Collection - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.444**</b>	<b>.300**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.511**</b>	<b>.670**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.571**</b>	<b>.458**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.621**</b>	<b>.836**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.511**</b>	<b>.417**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.547**</b>	<b>.750**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	<b>Pearson Correlation</b>	<b>.561**</b>	<b>.542**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809

Table 55 - Statistically Significant Correlations to Programming

		Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total	Programs - Attendance - Adult	Programs - Attendance - Children	Programs - Attendance - Young Adult	Programs - Attendance - Total	Registered Borrowers
Income - State Per Capita/Per Square Mile	<b>Pearson Correlation</b>	<b>.433**</b>	<b>.604**</b>	<b>.486**</b>	<b>.598**</b>	<b>.525**</b>	<b>.713**</b>	<b>.301**</b>	<b>.670**</b>	<b>.751**</b>
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total FTE w/MLS	<b>Pearson Correlation</b>	<b>.531**</b>	<b>.728**</b>	<b>.525**</b>	<b>.716**</b>	<b>.729**</b>	<b>.888**</b>	<b>.472**</b>	<b>.874**</b>	<b>.860**</b>
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Librarian FTE	<b>Pearson Correlation</b>	<b>.510**</b>	<b>.753**</b>	<b>.524**</b>	<b>.723**</b>	<b>.683**</b>	<b>.865**</b>	<b>.461**</b>	<b>.843**</b>	<b>.842**</b>
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Other Staff	<b>Pearson Correlation</b>	<b>.540**</b>	<b>.719**</b>	<b>.528**</b>	<b>.715**</b>	<b>.700**</b>	<b>.856**</b>	<b>.452**</b>	<b>.842**</b>	<b>.931**</b>
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total Paid Staff	<b>Pearson Correlation</b>	<b>.550**</b>	<b>.760**</b>	<b>.548**</b>	<b>.746**</b>	<b>.722**</b>	<b>.894**</b>	<b>.473**</b>	<b>.876**</b>	<b>.935**</b>
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809

Table 56 - Programming and Quality-of-Life

	Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total	Programs - Attendance - Adult	Programs - Attendance - Children	Programs - Attendance - Total
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								- Young Adult	
EMPLOYMENT STATUS - Population 16 years and over - In labor force	<b>Pearson Correlation</b>	<b>.683**</b>	<b>.591**</b>	<b>.266</b>	<b>.638**</b>	<b>.688**</b>	<b>.744**</b>	<b>.174</b>	<b>.751**</b>
	Sig. (2-tailed)	.000	.002	.199	.001	.000	.000	.406	.000
	N	25	25	25	25	25	25	25	25
EMPLOYMENT STATUS - Population 16 years and over - In labor force - Civilian labor force - Unemployed	<b>Pearson Correlation</b>	<b>.736**</b>	<b>.695**</b>	<b>.254</b>	<b>.728**</b>	<b>.754**</b>	<b>.840**</b>	<b>.173</b>	<b>.841**</b>
	Sig. (2-tailed)	.000	.000	.220	.000	.000	.000	.409	.000
	N	25	25	25	25	25	25	25	25
SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - Elementary school (grades 1-8) -Percent	<b>Pearson Correlation</b>	<b>-.466*</b>	<b>-.491*</b>	<b>-.053</b>	<b>-.490*</b>	<b>-.365</b>	<b>-.387</b>	<b>.190</b>	<b>-.375</b>
	Sig. (2-tailed)	.019	.013	.803	.013	.073	.056	.364	.065
	N	25	25	25	25	25	25	25	25
SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school - Percent	<b>Pearson Correlation</b>	<b>.774**</b>	<b>.584**</b>	<b>.275</b>	<b>.660**</b>	<b>.630**</b>	<b>.647**</b>	<b>.062</b>	<b>.655**</b>
	Sig. (2-tailed)	.000	.002	.184	.000	.001	.000	.768	.000
	N	25	25	25	25	25	25	25	25
EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent	<b>Pearson Correlation</b>	<b>.671**</b>	<b>.554**</b>	<b>.260</b>	<b>.609**</b>	<b>.662**</b>	<b>.716**</b>	<b>.162</b>	<b>.723**</b>
	Sig. (2-tailed)	.000	.004	.209	.001	.000	.000	.438	.000
	N	25	25	25	25	25	25	25	25
INCOME AND BENEFITS (IN 2013 INFLATION-ADJUSTED DOLLARS) - Total households - Median household income (dollars)	<b>Pearson Correlation</b>	<b>.535**</b>	.197	.264	.313	.329	.317	.087	.329
	Sig. (2-tailed)	.006	.346	.202	.128	.108	.123	.680	.108
	N	25	25	25	25	25	25	25	25

Table 57 - Circulation and Quality-of-Life

		<b>SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma -Percent</b>
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<b>Circulation - Juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.784**</b>	<b>.862**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Non-juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.789**</b>	<b>.850**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Total</b>	<b>Pearson Correlation</b>	<b>.790**</b>	<b>.856**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Per Capita (Service Population)</b>	<b>Pearson Correlation</b>			<b>-.415*</b>
	Sig. (2-tailed)			.039
	N			25

Table 58 - Percent Registered Patrons Correlations

		<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma -Percent</b>	<b>INCOME AND BENEFITS (IN 2013 INFLATION-ADJUSTED DOLLARS) - Total households - Mean household income (dollars)</b>
Registered Borrowers - Percent Registered	<b>Pearson Correlation</b>	<b>-.453*</b>	<b>.405*</b>
	Sig. (2-tailed)	.023	.045
	N	25	25

Table 59 - Correlations with Percent Population in College or with Bachelor's Degree

		<b>SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent</b>
Staff - Total FTE w/MLS	<b>Pearson Correlation</b>	<b>.757**</b>	<b>.823**</b>
	Sig. (2-tailed)	.000	.000
	N	25	25
Service Hours - Main - Weekly Hours	<b>Pearson Correlation</b>	<b>.474*</b>	<b>.467*</b>
	Sig. (2-tailed)	.017	.019
	N	25	25

		Income - Per Capita (Service Population)	Income - Per Capita (Census/Estimated Population)
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Circulation - Per Capita (Service Population)	Pearson Correlation	.523**	.533**
	Sig. (2-tailed)	.000	.000
	N	809	809
Circulation - Per Capita (Census/Estimated Population)	Pearson Correlation	.468**	.808**
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Service Population)	Pearson Correlation	.596**	.390**
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Census/Estimated Population)	Pearson Correlation	.507**	.779**
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	Pearson Correlation	.904**	.582**
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	Pearson Correlation	.606**	.902**
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	Pearson Correlation	.520**	.562**
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Service Population)	Pearson Correlation	.511**	.547**
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Census/Estimated Population)	Pearson Correlation	.417**	.750**
	Sig. (2-tailed)	.000	.000
	N	809	809

		Service Hours - Main - Weekly Hours	Service Hours - Branch - Weekly Hours	Service Hours - Bookmobile - Weekly Hours
Automation - Number of Internet Computers	Pearson Correlation	.564**	.624**	.491**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Online Full Text Databases	Pearson Correlation	.388**	.447**	.140**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Weekly	Pearson Correlation	.450**	.544**	.347**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Yearly	Pearson Correlation	.450**	.544**	.347**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Internet Terminals - Public	Pearson Correlation	.530**	.628**	.417**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Internet Terminals - Staff	Pearson Correlation	.598**	.592**	.522**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Wireless Sessions – Annually	Pearson Correlation		.313**	.440**
	Sig. (2-tailed)		.000	.000
	N		809	809
Circulation - Juvenile - Annual	Pearson Correlation	.518**	.523**	.631**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Non-juvenile - Annual	Pearson Correlation	.459**	.547**	.486**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809

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Circulation - Total	Pearson Correlation	.491**	.556**	.545**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Electronic	Pearson Correlation	.345**	.544**	.712**
	Sig. (2-tailed)	.000	.000	.000
	N	246	246	246
Collection - Print	Pearson Correlation	.588**	.584**	.631**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Print Serials	Pearson Correlation	.596**	.585**	.451**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Audios	Pearson Correlation	.509**	.294**	.732**
	Sig. (2-tailed)	.000	.000	.000
	N	320	320	320
Audios - Physical Units	Pearson Correlation	.523**	.589**	.638**
	Sig. (2-tailed)	.000	.000	.000
	N	489	489	489
Income - County	Pearson Correlation	.441**	.752**	.333**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Per Capita/Per Square Mile	Pearson Correlation	.424**	.467**	.665**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Total	Pearson Correlation	.424**	.547**	.368**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Programs - Program Attendance - Total	Pearson Correlation	.552**	.555**	.467**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total FTE w/MLS	Pearson Correlation	.505**	.539**	.543**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total Paid Staff	Pearson Correlation	.584**	.667**	.522**
	Sig. (2-tailed)	.000	.000	.000
	N	164	164	164
Visits - Weekly	Pearson Correlation	.572**	.638**	.481**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Visits - Yearly	Pearson Correlation	.572**	.638**	.481**
	Sig. (2-tailed)	.000	.000	.000

		Visits - Annual Per Capita (Service Population)	Visits - Annual Per Capita (Census/Estimated Population)
Collection - Per Capita (Service Population)	Pearson Correlation	.444**	.300**
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Census/Estimated Population)	Pearson Correlation	.511**	.670**
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	Pearson Correlation	.571**	.458**
	Sig. (2-tailed)	.000	.000

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	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	Pearson Correlation	.621**	.836**
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Service Population)	Pearson Correlation	.511**	.417**
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Census/Estimated Population)	Pearson Correlation	.547**	.750**
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	Pearson Correlation	.561**	.542**
	Sig. (2-tailed)	.000	.000
	N	809	809

		Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total	Programs - Attendance - Adult	Programs - Attendance - Children	Programs - Attendance - Young Adult	Programs - Attendance - Total	Registered Borrowers - Registered Borrowers
Income - State - Per Capita/Per Square Mile	Pearson Correlation	.433**	.604**	.486**	.598**	.525**	.713**	.301**	.670**	.751**
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total FTE w/MLS	Pearson Correlation	.531**	.728**	.525**	.716**	.729**	.888**	.472**	.874**	.860**
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Librarian FTE	Pearson Correlation	.510**	.753**	.524**	.723**	.683**	.865**	.461**	.843**	.842**
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Other Staff	Pearson Correlation	.540**	.719**	.528**	.715**	.700**	.856**	.452**	.842**	.931**
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total Paid Staff	Pearson Correlation	.550**	.760**	.548**	.746**	.722**	.894**	.473**	.876**	.935**
	Sig. (2- tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809

		Programs - Programs - Adult	Programs - Programs - Children	Programs - Programs - Young Adult	Programs - Programs - Total	Programs - Program Attendance - Adult	Programs - Program Attendance - Children	Programs - Program Attendance - Young Adult	Programs - Program Attendance - Total
EMPLOYMENT STATUS - Population 16 years and over - In labor force	Pearson Correlation	.683**	.591**	.266	.638**	.688**	.744**	.174	.751**
	Sig. (2- tailed)	.000	.002	.199	.001	.000	.000	.406	.000
	N	25	25	25	25	25	25	25	25
EMPLOYMENT STATUS - Population 16 years and over - In labor force - Civilian labor force - Unemployed	Pearson Correlation	.736**	.695**	.254	.728**	.754**	.840**	.173	.841**
	Sig. (2- tailed)	.000	.000	.220	.000	.000	.000	.409	.000
	N	25	25	25	25	25	25	25	25
SCHOOL ENROLLMENT -	Pearson Correlation	-.466*	-.491*	-.053	-.490*	-.365	-.387	.190	-.375

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Population 3 years and over enrolled in school - Elementary school (grades 1-8) -Percent	Sig. (2-tailed)	.019	.013	.803	.013	.073	.056	.364	.065
	N	25	25	25	25	25	25	25	25
SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent	Pearson Correlation	.774**	.584**	.275	.660**	.630**	.647**	.062	.655**
	Sig. (2-tailed)	.000	.002	.184	.000	.001	.000	.768	.000
	N	25	25	25	25	25	25	25	25
EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent	Pearson Correlation	.671**	.554**	.260	.609**	.662**	.716**	.162	.723**
	Sig. (2-tailed)	.000	.004	.209	.001	.000	.000	.438	.000
	N	25	25	25	25	25	25	25	25
INCOME AND BENEFITS (IN 2013 INFLATION-ADJUSTED DOLLARS) - Total households - Median household income (dollars)	Pearson Correlation	.535**	.197	.264	.313	.329	.317	.087	.329
	Sig. (2-tailed)	.006	.346	.202	.128	.108	.123	.680	.108
	N	25	25	25	25	25	25	25	25

		<b>SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma -Percent</b>
<b>Circulation - Juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.784**</b>	<b>.862**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Non-juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.789**</b>	<b>.850**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Total</b>	<b>Pearson Correlation</b>	<b>.790**</b>	<b>.856**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Per Capita (Service Population)</b>	<b>Pearson Correlation</b>			<b>-.415*</b>
	Sig. (2-tailed)			.039
	N			25

		SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent	EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree - Percent
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Staff - Total FTE w/MLS	Pearson Correlation	.757**	.823**
	Sig. (2-tailed)	.000	.000
	N	25	25
Service Hours - Main - Weekly Hours	Pearson Correlation	.474*	.467*
	Sig. (2-tailed)	.017	.019
	N	25	25

		EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma - Percent	INCOME AND BENEFITS (IN 2013 INFLATION-ADJUSTED DOLLARS) - Total households - Mean household income (dollars)
Registered Borrowers - Percent Registered	Pearson Correlation	-.453*	.405*
	Sig. (2-tailed)	.023	.045
	N	25	25

Table 60 - Average Juvenile Collection Circulation from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Circulation - Juvenile - Annual	2006	80	22824.81	10951.08	34698.55	0	307161
	2007	80	23719.86	11106.78	36332.95	0	322794
	2008	80	23093.53	10845.59	35341.46	0	322858
	2009	80	25381.78	11580.87	39182.68	0	338926
	2010	80	25810.84	12011.27	39610.41	0	318320
	2011	81	25910.88	11722.75	40099	0	326088
	2012	82	25028.17	12122.3	37934.04	-1	290908
	2013	82	24904.65	11582.94	38226.36	0	311219
	2014	82	25807.89	11761.56	39854.22	0	312584
	2015	82	25933.41	11738.25	40128.58	0	320902
Total	809	24848.61	20712.53	28984.69	-1	338926	
	Change	12%					

Table 61 - Average Non-Juvenile Circulation from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Circulation - Non-juvenile - Annual	2006	80	45587.16	23858.22	67316.1	153	598675
	2007	80	46358.26	24064.31	68652.22	250	624090
	2008	80	49807.54	25655.51	73959.56	265	628679
	2009	80	52669.68	27450.45	77888.9	250	641002
	2010	80	58591.65	27525.12	89658.18	178	920827
	2011	81	66916.52	19694.23	114138.81	588	1746477
	2012	82	66866.35	17603.47	116129.24	679	1895584
	2013	82	51410.16	24094.85	78725.47	725	836787
	2014	82	46651.35	24791.6	68511.1	0	501649



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	2015	82	48135.24	24183.36	72087.13	0	625244
	Total	809	53315.89	43660.83	62970.96	0	1895584
		Change	5%				

Table 62 - Average Circulation Per Capita (Service Population) from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Circulation - Per Capita (Service Population)	2006		
	2007	80	6.0115	5.0656	6.9574	0.38	34.21
	2008	80	6.3279	5.3966	7.2592	0.4	31.36
	2009	80	6.5946	5.6971	7.4922	0.38	26.56
	2010	80	6.937	5.7761	8.0979	0.38	35.32
	2011	81	6.4637	5.3829	7.5445	1.62	34.67
	2012	82	6.4121	5.3807	7.4435	1.78	37.3
	2013	82	6.023	5.0523	6.9938	1.91	36.03
	2014	82	5.9749	4.9173	7.0325	0.86	37.89
	2015	82	6.1645	4.9837	7.3453	1.03	41.91
	Total	809	6.3171	5.997	6.6372	0.38	41.91
		Change	-2%				

Table 63 - Average Electronic Circulation from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Circulation - Electronic	2006		
	2007	0	.	.	.	.	
	2008	0	.	.	.	.	
	2009	0	.	.	.	.	
	2010	0	.	.	.	.	
	2011	0	.	.	.	.	
	2012	0	.	.	.	.	
	2013	82	3982.01	1765.17	6198.85	0	59451
	2014	82	9566.8	256.62	18876.99	0	374769
	2015	82	7362.88	3534.68	11191.07	0	94329
	Total	246	6970.57	3570.79	10370.34	0	374769
		Change	46%				

Table 64 - Average Children's Programs from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Programs - Children	2006		
	2007	80	78.38	56.51	100.24	1	431
	2008	80	82.3	59.82	104.78	1	451
	2009	80	93.09	67.86	118.32	0	493
	2010	80	102.4	73.73	131.07	0	618
	2011	81	108.35	77.79	138.91	1	695
	2012	82	115.82	85.13	146.51	1	667

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	2013	82	123.5	75.89	171.11	0	1716
	2014	82	114.01	85.25	142.77	0	682
	2015	82	131.39	95.19	167.59	0	792
	Total	809	102.76	93.25	112.28	0	1716
		Change	42%				

Table 65 - Average Young Adult Programs from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs - Young Adult	2006	80	4.1	2.49	5.71	0	37
	2007	80	5.2	3.27	7.13	0	41
	2008	80	8.89	4.34	13.44	0	147
	2009	80	11.18	5.97	16.38	0	164
	2010	80	12.63	6.64	18.61	0	178
	2011	81	13.84	7.5	20.18	0	173
	2012	82	15.8	7.65	23.96	0	260
	2013	82	15.2	7.87	22.52	0	208
	2014	82	14.6	8.76	20.44	0	183
	2015	82	19.9	8.75	31.05	0	362
	Total	809	12.18	10.15	14.2	0	362
		Change	79%				

Table 66 - Average Adult Programs from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs - Adult	2006	80	20.79	12.8	28.78	0	229
	2007	80	22.34	14.07	30.61	0	222
	2008	80	24.18	15.96	32.39	0	214
	2009	80	31.38	20.93	41.82	0	226
	2010	80	42.2	20.18	64.22	0	786
	2011	81	36.47	24.65	48.29	0	298
	2012	82	40.54	26.26	54.81	0	361
	2013	82	67.99	17.99	117.98	0	2028
	2014	82	46.15	31.29	61	0	414
	2015	82	50.96	34.3	67.63	0	462
	Total	809	38.43	31.99	44.86	0	2028
		Change	59%				

Table 67 - Average Programming from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs - Total	2006	80	101.36	73.23	129.49	0	600
	2007	80	105.91	76.16	135.67	1	544
	2008	80	115.36	83.01	147.71	1	690
	2009	80	135.64	99.32	171.96	0	678
	2010	80	157.23	113.11	201.34	0	857
	2011	81	158.65	116.56	200.75	1	793
	2012	82	172.16	128.12	216.2	1	849

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	2013	82	206.68	105.67	307.7	0	3952
	2014	82	174.76	129.56	219.95	0	985
	2015	82	202.26	143.81	260.71	0	1350
	Total	809	153.36	137.44	169.29	0	3952
	Change		50%				

Table 68 - Average Children Program Attendance from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs Attendance - Children	2006	80	1870.69	1196.19	2545.19	0	14832
	2007	80	1905.18	1197.43	2612.92	5	14683
	2008	80	1982.81	1240.83	2724.79	0	15926
	2009	80	2124.91	1340.82	2909.01	0	18419
	2010	80	2064.94	1253.74	2876.13	0	20567
	2011	81	2120.65	1329.47	2911.84	5	19866
	2012	82	2242.26	1424.26	3060.25	6	18302
	2013	82	2359.22	1401.82	3316.62	0	28000
	2014	82	2530.57	1638.79	3422.35	0	18588
	2015	82	2578.83	1604.39	3553.26	0	24418
	Total	809	2180.4	1924.73	2436.08	0	28000
Change		27%					

Table 69 - Average Young Adult Program Attendance from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs Attendance - Young Adult	2006	80	109.98	36.74	183.21	0	2577
	2007	80	163.19	59.6	266.78	0	3250
	2008	80	217.83	72.12	363.53	0	4456
	2009	80	257.81	101.7	413.93	0	4692
	2010	80	262.05	69.83	454.27	0	7148
	2011	81	285.83	57.34	514.31	0	8798
	2012	82	271.74	20.93	522.56	0	10117
	2013	82	262.35	33.53	491.18	0	9160
	2014	82	258.15	62.09	454.2	0	7762
	2015	82	250.5	37.45	463.55	0	8303
	Total	809	234.27	175.85	292.69	0	10117
Change		56%					

Table 70 - Average Adult Program Attendance from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs Attendance - Adult	2006	80	468.03	288.15	647.9	0	4333
	2007	80	630.71	353.36	908.06	0	8572
	2008	80	671.01	344.37	997.66	0	11069
	2009	80	799.26	390.45	1208.07	0	14310

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	2010	80	832.68	330.34	1335.01	0	18705
	2011	81	908.09	399.7	1416.47	0	17996
	2012	82	968.94	441.92	1495.96	0	18658
	2013	82	1050.63	433.48	1667.79	0	17391
	2014	82	994.76	482.27	1507.25	0	17500
	2015	82	997.38	536.19	1458.57	0	15036
	Total	809	833.93	693.09	974.77	0	18705
	Change		53%				

Table 71 - Average Total Program Attendance from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs Attendance – Total	2006	80	2448.69	1606.35	3291.02	0	17581
	2007	80	2699.08	1710.1	3688.05	5	22679
	2008	80	2871.65	1781.82	3961.48	0	29304
	2009	80	3181.99	1987.11	4376.87	0	31088
	2010	80	3159.66	1802.29	4517.04	0	41260
	2011	81	3314.57	1926.3	4702.84	5	42803
	2012	82	3482.94	2021.2	4944.68	6	45787
	2013	82	3672.21	2043.41	5301	0	43425
	2014	82	3783.48	2338.39	5228.56	0	35584
	2015	82	3826.71	2347.59	5305.83	0	31857
Total	809	3248.61	2840	3657.21	0	45787	
Change		36%					

Table 72 - Percent of Total Montana Public Library Programs from 2006- 2015

Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total
31,086	83,134	9,851	124,071
25%	67%	8%	100%

In terms of overall attendance from 2006-2015, the percentage of attendance almost mirrors their respective percentage of programs offered.

Table 73 - Percent of Total Montana Public Library Program Attendees from 2006- 2015

Program Attendance - Adult	Program Attendance - Children	Program Attendance - Young Adult	Program Attendance - Total
674,650	1,763,947	189,525	2,628,122
26%	67%	7%	100%

When a program to attendance ratio was calculated interestingly the adult-to-attendance ratio was higher at 1 program to 21.7 attendees than both children (1/21.2) and young adults (1/19.2) program to attendance ratios.

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Program to Attendance Ratio - Adult	Program to Attendance Ratio - Children	Program to Attendance Ratio - Young Adult	Program to Attendance Ratio - Total
1 to 21.7	1 to 21.2	1 to 19.2	21.2

Table 74 - Library Automation: Significant Changes

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum	
					Lower Bound	Upper Bound			
Automation - Number of Internet Computers	2006	80	10.15	11.684	1.306	7.55	12.75	0	73
	2007	80	10.7	12.345	1.38	7.95	13.45	0	69
	2008	80	11.86	13.093	1.464	8.95	14.78	1	69
	2009	80	12.53	13.311	1.488	9.56	15.49	1	69
	2010	80	13.75	15.067	1.685	10.4	17.1	1	76
	2011	81	15.1	16.628	1.848	11.42	18.78	1	85
	2012	82	15.56	16.271	1.797	11.99	19.14	1	93
	2013	82	15.28	16.075	1.775	11.75	18.81	1	99
	2014	82	16.55	18.941	2.092	12.39	20.71	1	108
	2015	82	16.44	19.046	2.103	12.25	20.62	2	113
Total	809	13.81	15.546	0.547	12.74	14.89	0	113	
	Change	38%							
Automation - Online Full Text Databases	2006	80	8.26	9.385	1.049	6.17	10.35	0	66
	2007	80	9.93	12.104	1.353	7.23	12.62	0	69
	2008	80	10.66	11.735	1.312	8.05	13.27	0	69
	2009	80	10.58	11.262	1.259	8.07	13.08	0	69
	2010	80	12.63	14.216	1.589	9.46	15.79	0	76
	2011	81	13.38	15.895	1.766	9.87	16.9	0	85
	2012	82	13.84	15.007	1.657	10.54	17.14	0	93
	2013	82	0	0	0	0	0	0	0
	2014	82	0	0	0	0	0	0	0
	2015	82	0	0	0	0	0	0	0
Total	809	7.89	12.076	0.425	7.06	8.72	0	93	
	Change	40%							
Automation - Internet Terminals - Public	2006	80	9.13	10.443	1.168	6.8	11.45	1	66
	2007	80	9.78	11.536	1.29	7.21	12.34	1	69
	2008	80	10.69	11.362	1.27	8.16	13.22	1	69
	2009	80	11.2	11.571	1.294	8.63	13.77	1	69
	2010	80	12.58	14.243	1.592	9.41	15.74	1	76
	2011	81	14.14	15.773	1.753	10.65	17.62	1	85
	2012	82	15.22	15.954	1.762	11.71	18.72	1	93
	2013	82	14.54	15.237	1.683	11.19	17.88	0	99
	2014	82	15.63	18.411	2.033	11.59	19.68	1	108
	2015	82	15.71	18.79	2.075	11.58	19.84	2	113
Total	809	12.89	14.755	0.519	11.87	13.9	0	113	
	Change	42%							

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Table 75 - Decline in Public Computer Users

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum	
					Lower Bound	Upper Bound			
Public Internet Computer Users - Weekly	2006	80	256.5	489.456	54.723	147.58	365.42	3	3060
	2007	80	314.43	570.843	63.822	187.39	441.46	2	3011
	2008	80	309.06	571.863	63.936	181.8	436.32	3	3260
	2009	80	323.79	601.946	67.3	189.83	457.74	4	3618
	2010	80	326.63	581.776	65.045	197.16	456.09	4	3155
	2011	81	323.31	566.357	62.929	198.08	448.54	2	3250
	2012	82	370.46	707.898	78.174	214.92	526.01	3	4328
	2013	82	347.91	690.498	76.253	196.2	499.63	0	4400
	2014	82	448.37	1264.987	139.694	170.42	726.31	0	10098
	2015	82	271.23	418.65	46.232	179.24	363.22	0	2350
Total	809	329.46	682.741	24.004	282.34	376.58	0	10098	
	Change	5%							
Public Internet Computer Users - Yearly	2006	80	13338	25451.699	2845.586	7674	19002	156	159120
	2007	80	16350.1	29683.854	3318.756	9744.28	22955.92	104	156572
	2008	80	16071.25	29736.866	3324.683	9453.63	22688.87	156	169520
	2009	80	16836.95	31301.207	3499.581	9871.21	23802.69	208	188136
	2010	80	16984.5	30252.371	3382.318	10252.16	23716.84	208	164060
	2011	81	16812.05	29450.58	3272.287	10299.99	23324.11	104	169000
	2012	82	19264.1	36810.697	4065.061	11175.9	27352.29	156	225056
	2013	82	18091.56	35905.89	3965.142	10202.17	25980.95	0	228800
	2014	82	23,315.02	65779.323	7264.111	8861.72	37768.33	0	525096
	2015	82	14,104.05	21769.788	2404.071	9320.7	18887.4	0	122200
Total	809	17131.98	35502.551	1248.203	14681.87	19582.08	0	525096	
	Change	5%							

Table 76 – Average Patron Uploads (Wired) from 2013 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Patron Upload Wired	2006	80	0	0	0	0	
	2007	80	0	0	0	0	
	2008	80	0	0	0	0	
	2009	80	0	0	0	0	
	2010	80	0	0	0	0	
	2011	81	0	0	0	0	
	2012	82	0	0	0	0	
	2013	82	7.71	3.36	12.05	0	100
	2014	82	20.28	-4.17	44.73	0	1000
	2015	82	20.51	-3.88	44.9	0	1000
Total	809	4.92	1.41	8.42	0	1000	
	Change	62%					

Table 77 - Average Patron Uploads (Wireless) from 2013 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
			Lower Bound	Upper Bound		

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Patron Upload Wireless	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	6.88	2.65	11.1	0	100
	2014	82	20.01	-4.44	44.47	0	1000
	2015	82	19.48	-4.91	43.86	0	1000
	Total	809	4.7	1.2	8.2	0	1000
		Change	65%				

Table 78 - Average Wireless Sessions from 2014 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Wireless Sessions – Annually	2006	80	0	0	0	0	
	2007	80	0	0	0	0	
	2008	80	0	0	0	0	
	2009	80	0	0	0	0	
	2010	80	0	0	0	0	
	2011	81	0	0	0	0	
	2012	82	0	0	0	0	
	2013	82	0	0	0	0	
	2014	82	2686.07	664.75	4707.4	0	67942
	2015	82	3477.74	1166.31	5789.18	0	61344
	Total	809	624.76	307.41	942.12	0	67942
	Change	23%					

Table 79 - Average Interlibrary Loans from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Interlibrary Loans - Loans - In State	2006	80	1,083.04	168.13	1997.94	0	29848
	2007	80	1,377.65	198.02	2557.28	0	37109
	2008	80	1,314.46	336.46	2292.46	0	33059
	2009	80	2,059.46	523.33	3595.59	0	48722
	2010	80	2,607.48	704.16	4510.79	0	61498
	2011	81	2,295.80	382.37	4209.24	0	59124
	2012	82	2,298.96	380.26	4217.67	0	56317
	2013	82	2,843.72	685.24	5002.2	-1	66599
	2014	82	2,609.48	490.43	4728.52	0	65927
	2015	82	2,707.04	545.11	4868.96	0	68508
	Total	809	2,124.82	1580.42	2669.22	-1	68508
	Change	60%					

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Table 80 - Average ILL Borrows from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Interlibrary Loans - Borrows - In State	2006	80	1106.01	192.44	2019.59	0	27721
	2007	80	1258.53	134.87	2382.18	0	37038
	2008	80	1568.74	114.55	3022.92	0	43109
	2009	80	2020.66	314.7	3726.62	0	55035
	2010	80	2563.73	484.13	4643.32	0	61814
	2011	81	2225.11	90.48	4359.74	0	67046
	2012	82	2301.01	223.17	4378.85	0	64900
	2013	82	2668	417.6	4918.4	-1	65215
	2014	82	2691.38	430.76	4951.99	0	64701
	2015	82	2723.33	399.79	5046.87	0	68727
Total	809	2117.57	1526.08	2709.06	-1	68727	
	Change	59%					



**Appendix E5 – Figures**



*Figure 1 - Mother and her son using the Internet at North Jefferson County Library District in Clancy*



*Figure 2 - Founding Patron and Librarian at Boulder Community Library*



Figure 3 - Reference Desk Staff at Butte-Silver Bow Public Library

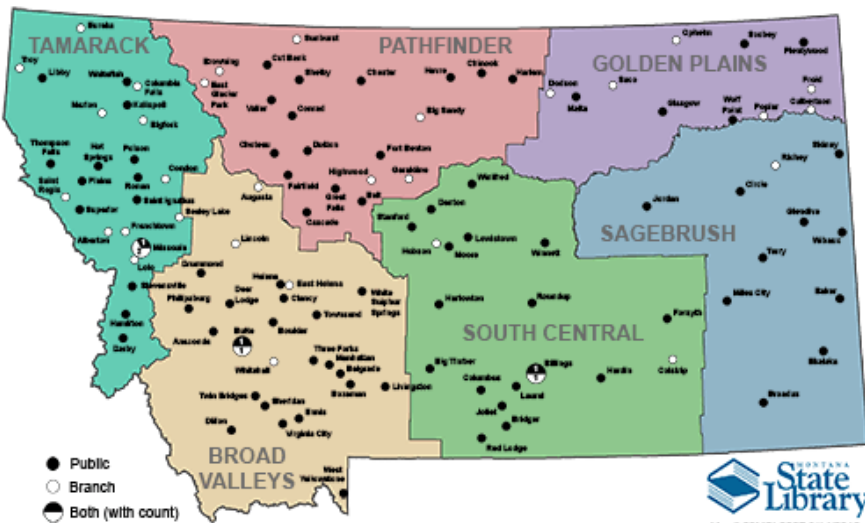


Figure 4 - Montana State Library Federations

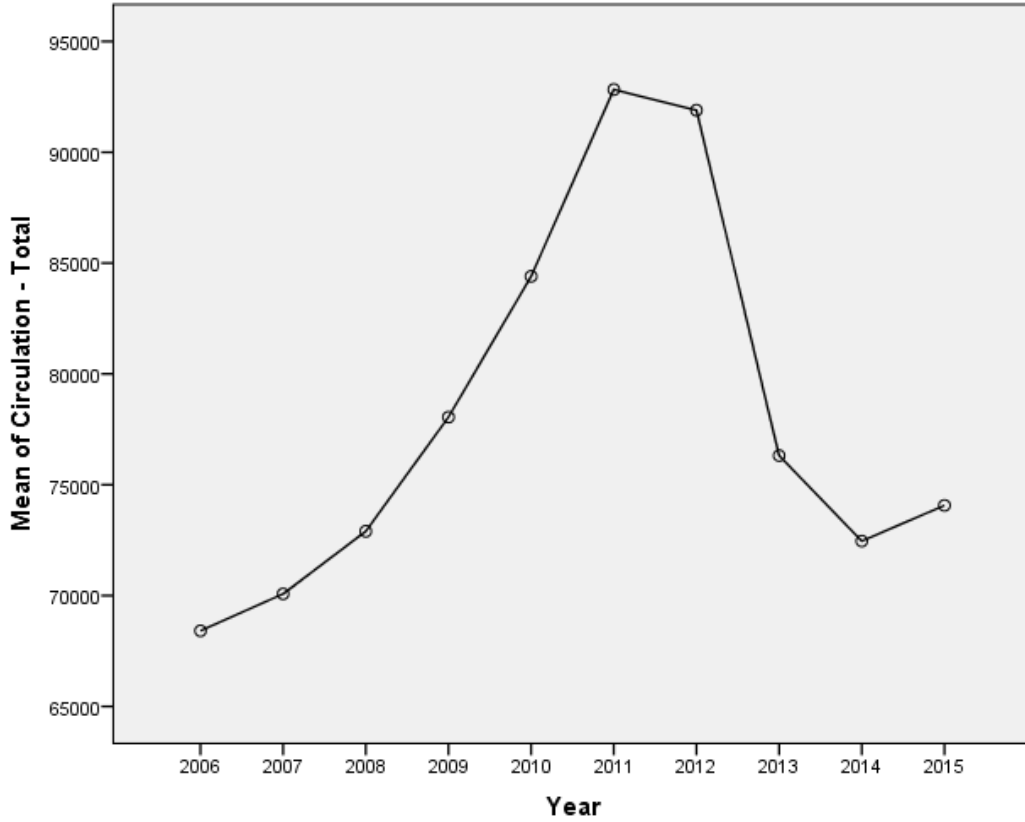


Figure 5 - Average Circulation from 2006 to 2015

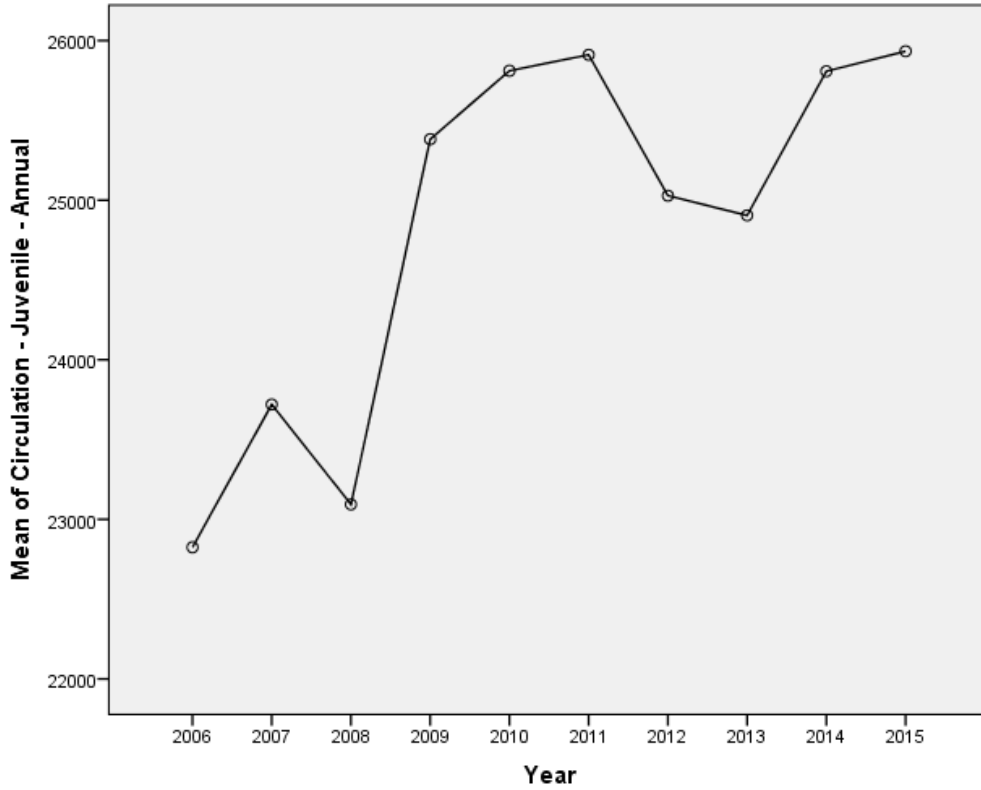


Figure 6 - Average Juvenile Circulation from 2006 to 2015

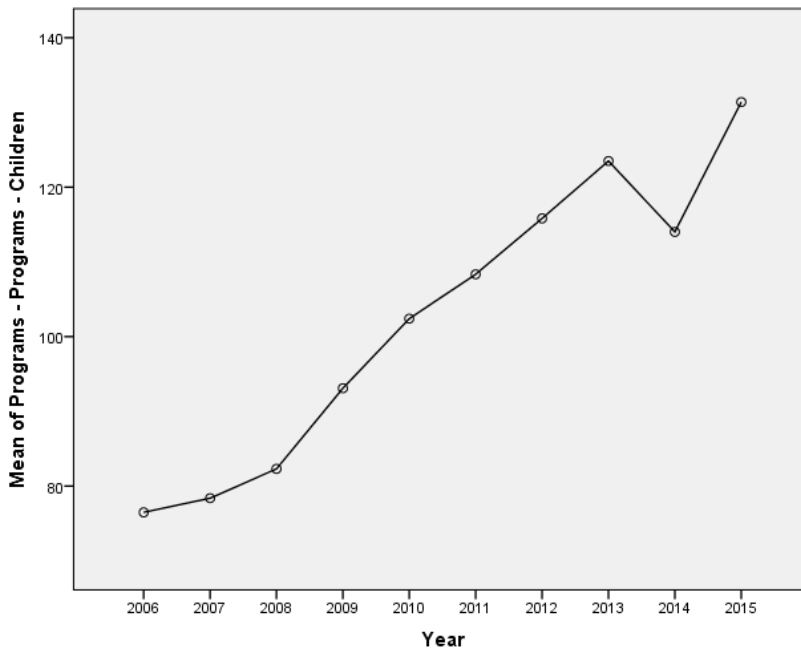


Figure 7 - Average Children's Program from 2006 to 2015

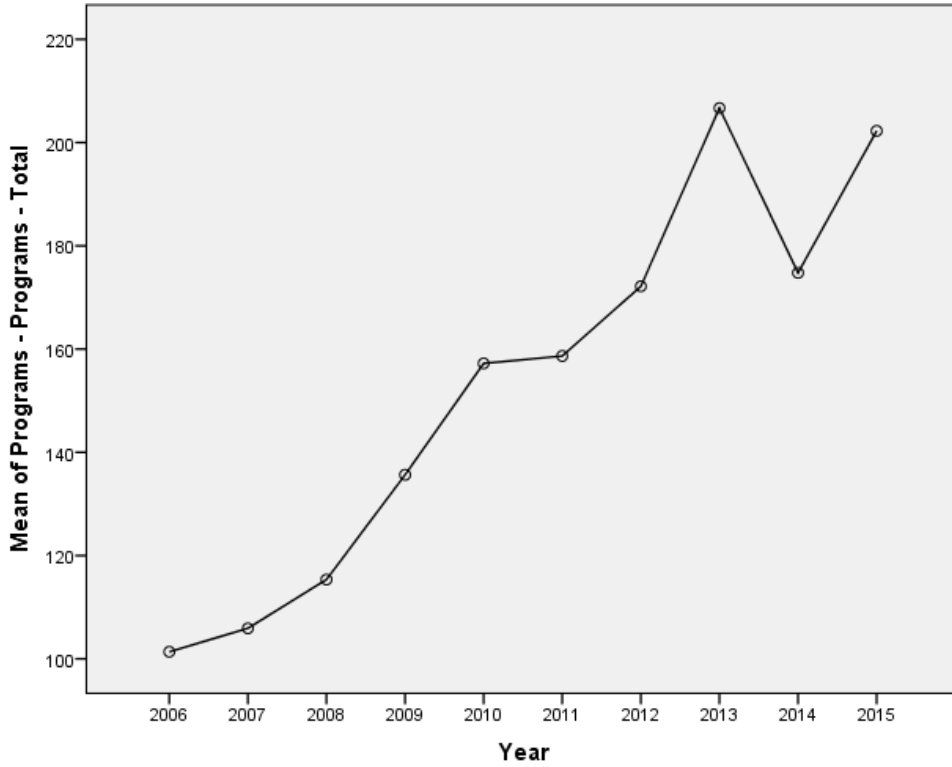


Figure 8 - Average Programs Offered from 2006 to 2015

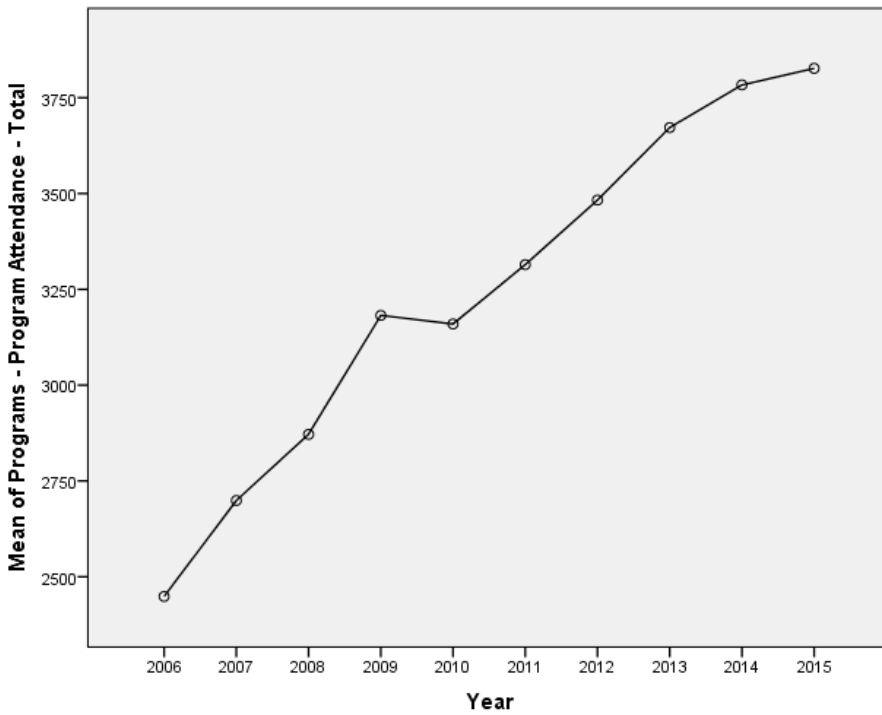
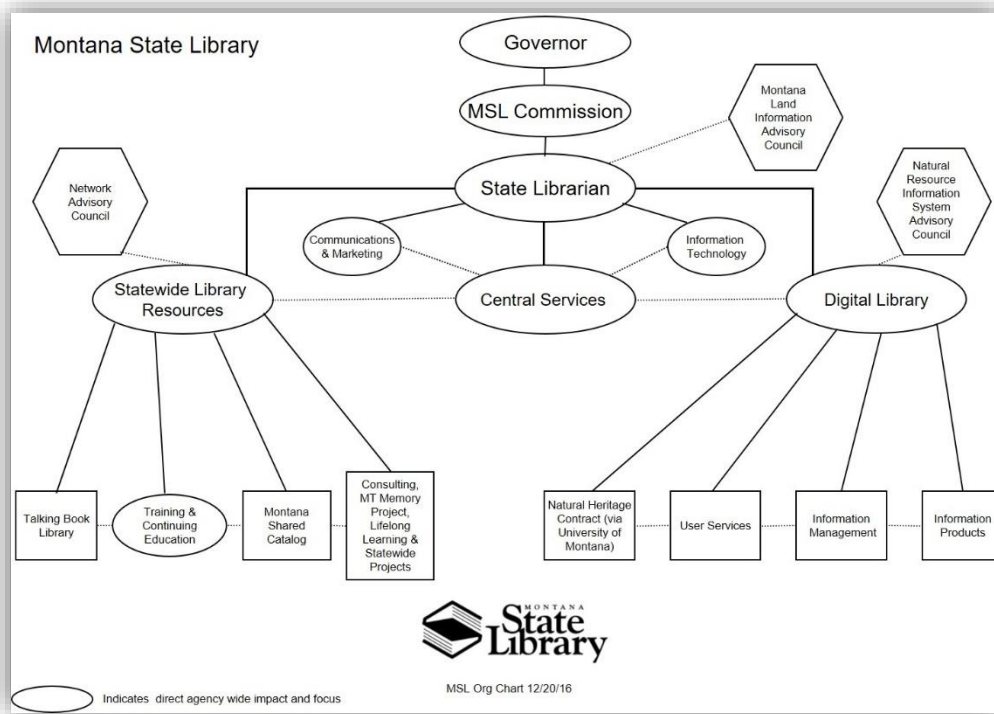


Figure 9 - Average Total Program Attendance from 2006 to 2015

Montana State Library LSTA Evaluation Report (2013-2017)

Figure 10- Montana State Library Organizational Chart (2016)



% LSTA Allocation by Goal (2012-2015)

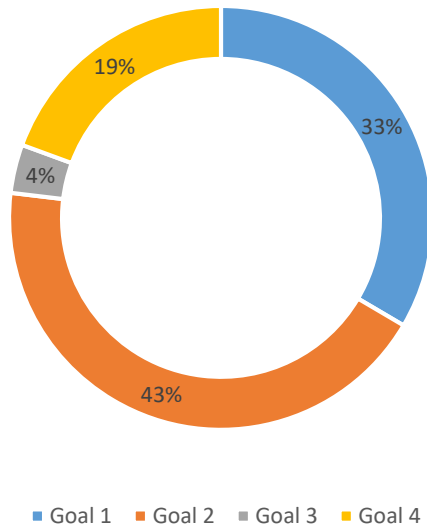


Figure 11 - LSTA Allocations by Goal (2012-2015)

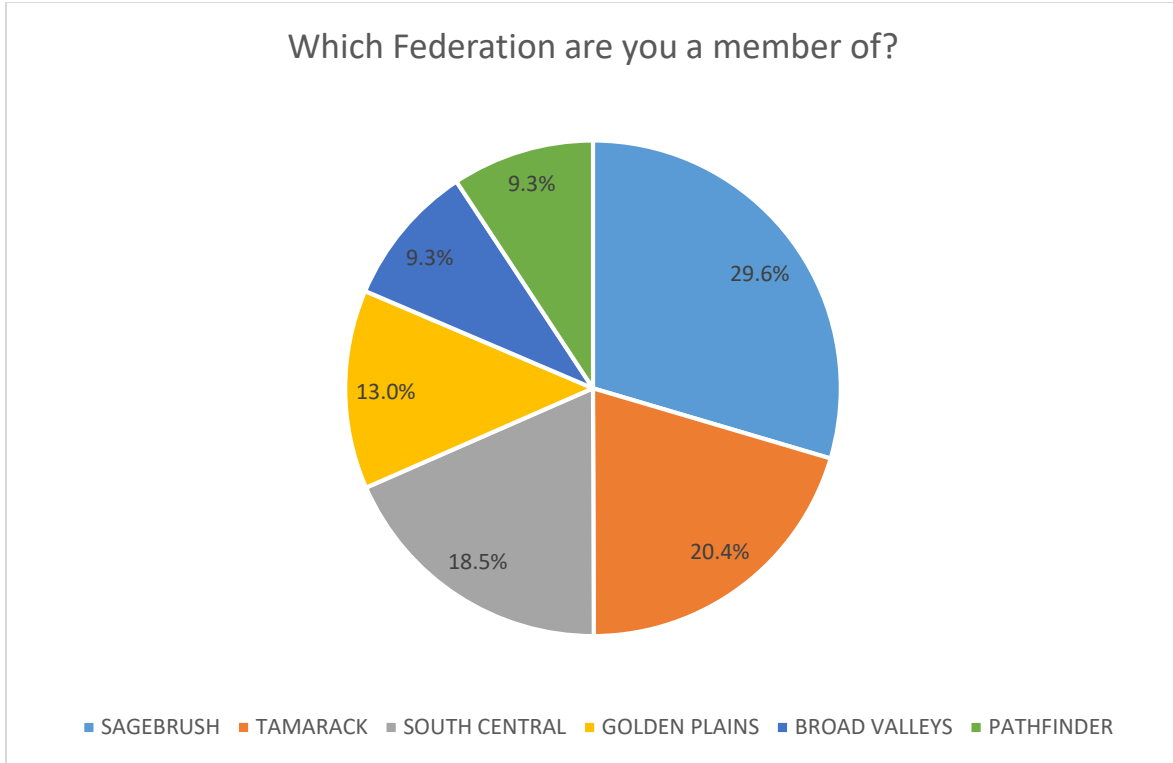
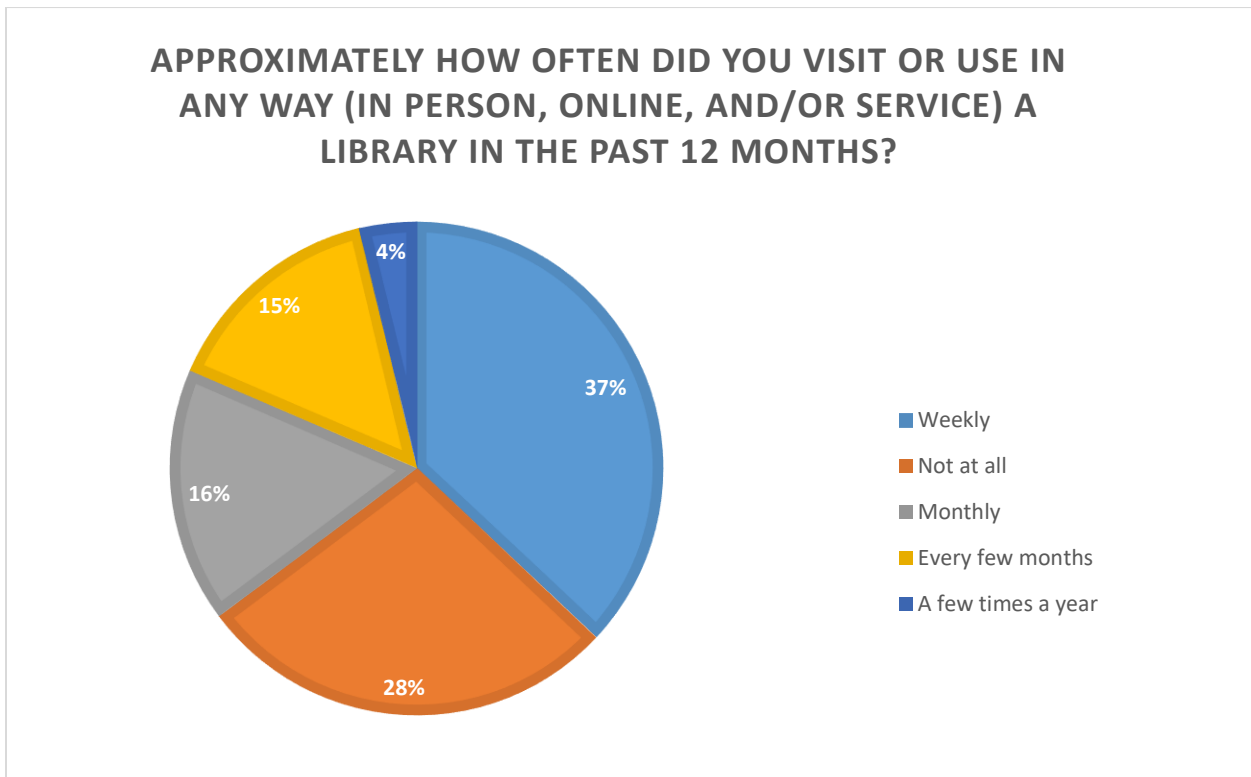


Figure 12 - Random Sample (Federations)





MONTANA  
**State  
Library**

***Library Services and Technology Act (LSTA)  
Evaluation Report  
2013-2017***

Anthony Chow, PhD  
Strategic Performance Systems, LLC  
February 6, 2017



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- All Montana library patrons

Sincerely,

Dr. Anthony Chow  
CEO, Strategic Performance Systems, LLC

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## Evaluation Summary

The Montana State Library’s Five-Year 2013-2017 LSTA evaluation took place over a six-month process from August 2016 to January 2017. A total of 253 participants took part in interviews (n=5), focus groups (six focus groups, n=23), four site visits spanning five days in Montana (four different libraries were visited), and a community wide survey administered to the general public (N=161) and also mailed to a random sample (N=54). In addition, 10-years of public library statistics was analyzed to identify longitudinal trends and existence of significant relationships between library inputs, outputs, and community quality-of-life factors.

### Montana Public Library Trends

Montana’s population is “graying” faster than the national average as its senior population is growing at a higher rate and exceeds the national average by 2.3%. While on par with, or doing better than the national average on a number of quality-of-life factors as measured by the US Census Bureau, Montana is below the national average in terms of median household income and per capita income over the past 12 months and above the national average in terms of poverty rate. Because of the downturn in the economy in a number of natural resource staples such as coal, timber, and oil that generates jobs and a more robust tax base, loss of jobs, and the continued shifting of the population towards seven of Montana’s largest cities, Montana is in a state of transition, which as a macro context has potential implications for library services in terms of resources, services, and programming.

In focus groups with state library staff and library directors from across the state and the statewide survey, the four main ways libraries can continue to serve the Montana community are through programming focused on life-long education and entertainment, providing technology and digital access, providing books/magazines/newspapers/information, and providing access in terms of hours/location/ease-of-use/different formats. The State Library can best support libraries in five significant ways – 1. Continue supporting “economically distressed” libraries whose local budgets have been recently cut while digital demand and cost continue to increase; 2. Focus integrated support in workforce development, digital literacy, and Internet access (librarians report these are commonly interrelated issues with patrons, especially when looking for jobs and trying to use resources); 3. Community education and outreach –



Figure 1 - Mother and her son using the Internet at North Jefferson County Library District in Clancy

much of the community does not seem to understand what libraries can do for them and are continuously surprised when some finally do use the library (this poses potential problems in terms of funding support from the community and community leaders as well); the other aspect of this is forming closer partnerships with organizations trying to do the same things and/or support the same types of patrons (e.g. literacy partnerships with schools); 4. Continue doing a great job in taking the lead in statewide resource sharing (MSC and ML2G, etc); and 5. Address concerns from some libraries about the “graying of the field” and the inability to recruit new library professionals or retain existing ones because of inadequate salaries and/or training.

Overall public library support in Montana has been consistently strong over the past ten years from 2006 to 2015. Public libraries have seen local support (library income per capita) and state support (State Income Per Capita/Per Square Mile) continue to increase. Use of public libraries

has also continued to grow in certain areas. Juvenile circulation of library resources has grown annually (except for a small dip in 2013) and increased overall by 12% from 2006 to 2015. Adult circulation has fluctuated, experienced a big dip in 2013 but continues to increase largely to digital circulation. Overall total circulation has remained relatively static but with a clear shift towards digital circulation. Program offerings, consistent with national trends, have shown



Figure 2 - Founding Patron and Librarian at Boulder Community Library

statistically significant increases over the past 10 years in young adult, adult, and overall programming offered. Children’s programs also increased by 42% but was not statistically significant.

Despite the significant increases in programs offered, Program Attendance, while having increased in all areas, were not statistically significant for any age group. Closer examination found that children’s programs represented 67% of all programs offered and all attendees but children’s program attendance only grew by 27% while adult and young adult programs represented only 33% but attendance has grown at much higher rates (56% and 53%, respectively). A program-to-attendance ratio was calculated for the 2006-2015 time period and adult programs were found to have the highest ratio at 1/21.7 compared to 1/21.2 for children

and 1/19.2 for young adults. All Montana programs combined had a 1/21.2 program-to-attendance ratio.

Library automation also experienced statistically significant growth in three areas – number of computers available, full-text online databases available, and public Internet terminals. At the same time, however, patron demand clearly also changed as the total number of computer users and annual computer usage actually dropped by 40%. While the demand for online access continues to increase, the demand for computers appears to be decreasing rapidly. Wireless and Wired bandwidth continues to increase in importance as patrons and staff uploads and downloads in public libraries have increased at statistically significant levels. Wireless sessions have also increased significantly.



Figure 3 - Reference Desk Staff at Butte-Silver Bow Public Library

All other traditional library metrics have remained relatively stable over the past 10-year period, which is significant because it does not support the general societal notion that people are using libraries less; rather, they are using them differently.

### **Libraries and Quality-of-Life**

A high positive return-on-investment was found as more money per capita was invested in a public library. Library per capita income has statistically significant positive relationships/correlations with a wide array of other library inputs and outputs: the overall percent of registered borrowers, circulation per capita, collection per capita, expenditures per capita, and visits per capita.

Another high positive return-on-investment was found as a main (or the only) library is open more hours. Weekly service hours of the main branch and overall weekly hours of all branches have positive and statistically significant relationships with a long list of library inputs and outputs including all categories of circulation, collection, staff with MLS degree, and total visits to the library. To increase overall annual per capita visits to a public library one should consider increasing the collection per capita, expenditures per capita, income per capita, and overall percentage of registered borrowers. While these are not causal or direct relationships there are real statistically significant and positive relationships. As one goes up so most likely will the other.

To increase program attendance at a public library it is recommended to increase per capita state income, full-time staff with a professional MLS degree, and overall staff. Increasing programs and program attendance have positive and statistically significant correlations with employment, percent of population enrolled in elementary and middle school, percent of population enrolled in college, percent of population with a bachelor's degree, and median income.

Increasing circulation (all types) also was found to have positive and statistically significant correlations with percent of population enrolled in college and percent of population with a bachelor's degree, while circulation per capita has a negative relationship with percent of population over 25 with no high school diploma.

Increasing the overall percentage of registered borrowers was also found to have a positive correlation with household median income and a negative correlation with percent of population over 25 without a high school diploma. Also, a significant relationship was found between the more staff with a professional MLS degree and the higher percent of population enrolled in college and also has a bachelor's degree.

### **Primary Challenges and Opportunities Facing Montana Public Libraries**

The primary challenges currently facing Montana libraries are funding/budgets, adequate staffing, physical accessibility, and resources. The primary opportunities are providing life-long learning programming, ensuring adequate and well-trained staff, continued partnerships and community advocacy, and marketing and outreach.

In addition, a special type of library, Tribal college libraries, face a number of unique challenges on all fronts (e.g. financial, cultural, historical, staffing, etc.) and the State Library could help most by providing a consultant (preferably a tribal member) that helps with communication, partnerships, and collaborations between local public libraries and tribal nations; prioritize services to tribal members in public libraries; prioritize services and programming for tribal youth; and finally digitization as there are many artifacts and aspects of tribal history that are being lost. The most asked for service for tribal college librarians was more in-person training as well as more electronic resources.

Montana librarians and patrons feel the top three ways public libraries serve the Montana community are through life-long learning programming (with an emphasis on early child and adult literacy), providing access to technology and digital access, and providing access to high quality books, magazines, newspapers, and other information.

### **State Library Vision, Strategic Plan, and Focal Areas**

A 2015 statewide study involving all major library stakeholders created a guiding strategic vision: *Libraries are leaders in creating thriving communities*. Eight focal areas were identified – library directors, library boards, library infrastructure, lifelong learning opportunities, public access technology, collaboration, effective governance and funding, and staff. A strategic framework, largely in response to these taskforce findings, was adopted by the State Library in

December 2016 with a guiding purpose to help *all organizations, communities, and Montanans thrive through excellent library resources and services* with three primary priorities in which to achieve this purpose: 1) Foster Partnerships, 2) Secure Sufficient and Sustainable Funding, and 3) Create a Useful Information Infrastructure.

These three primary priorities and eight strategic focal areas together serve as a guide and targeted outcomes for the State Library.

### **Montana’s LSTA Program**

Montana librarians were most satisfied with State Library services in the areas of OCLC group services, Montana Shared Catalog, the CE program, the MTBL, and early literacy. Evaluation participants were least satisfied with EBSCO Discovery Services, the courier service, consulting, downloadable e-content, and the MMP.

SWOT analysis found that the LSTA program’s greatest Strengths include its statewide services such as MSC, TBL, MMP, consulting, training, excellent staff, with strong centralized projects that continue to improve. Primary Weaknesses include the ongoing challenge in providing electronic resources to all Montanans, a need for closer alignment between inputs, outputs, and MSL’s strategic plan and LSTA goals (lack of focus at times), ongoing evaluation informed by clear, measurable goals, increasing cost of the MSC, marketing and outreach about the SLR/LSTA activities, and being perpetually at or near complete capacity and always near their breaking point.

The LSTA program’s greatest Opportunities include increasing partnerships with vendors and suppliers, improved communication as a team and organization, understanding local issues that may have statewide impact at a deeper level, creating a strong evaluation plan to ensure alignment with the new strategic plan, taskforce recommendations, and LSTA goals, continuing to improve on existing projects, the success of their new lifelong-learning position, and continued use of data and performance-driven planning and evaluation. Its greatest Threats include budget and concerns around it, loss of buying power or sustainability of existing programs and services, being stretched too thin, and tension between big and small libraries.

The LSTA program has successfully achieved four of the five evaluation recommendations identified in its 2008-2012 Five-Year evaluation. Recommendation 1, however, focuses on evaluation and, while some progress has been made, more work needs to occur here.

### **Progress Towards IMLS Priorities**

Five of the nine IMLS priorities were clearly achieved while four - #6 (targeting library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills), #5 (Developing public and private partnerships with other agencies and community-based organizations), #7 (Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with

incomes below the poverty line), and #4 (Enhancing efforts to recruit future professionals to the field of library and information services), were lower rated and less prioritized during the 2012-2015 evaluation period.

### **A-1 – Progress Towards LSTA 2013-2017 Goals**

All four LSTA goals were achieved, although Goal 3 (MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons) received only 4% of LSTA funds allocated. Goal 1 is *MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered*. A total of \$1,324,588.16 or 33% of all LSTA funds were allocated to this goal in 2012, 2013, 2014, and 2015. Staff's overall satisfaction with accomplishing the goal was 6.42 out of 7.0. As one participant noted, "Leadership and leading library development is a role that MSL has embraced and focused on through difficult financial times for public libraries and the state" (Staff member survey participant, December 2016).

Goal 2 is *MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services*. This goal was the lowest rated (5.75 out of 7.0) by staff yet had the highest percent of LSTA funds allocated with \$1,718,069.13 or 43% of all LSTA funding from 2012-2015. Three of the most significant activities implemented was the Montana Shared Catalog, MontanaLibrary2Go which circulated 4,862,102 e-resources to 60,064 new patron from 2012-2015, and the Montana Memory Project (MMP). As a staff member noted, "MSL and libraries have learned so much over the past five years about content, content delivery, and online resources. These lessons have been invaluable as we move into strategic planning and resource allocation in the future" (Staff survey response, December 2016)

Goal 3 is *MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons*. Goal 3 was the highest rated goal by the staff but only accounted for \$146,709.54 or 4% of total LSTA allocations. Closer examination of the logic model for this goal, however, shows that objectives 3.1, 3.2, and 3.3 were integrated with Goal 2 and accomplished; in addition, a wide variety of activities and outputs were accomplished for this goal including Ready2Read training events, Summer Reading training, and traveling makerspaces. A librarian participant noted, "I think they wrote the book on this – the State Library as a model; Jennie and her staff are just amazing; we are so lucky! They really have shown us how to resource share; seen some minor miracles – they exceed expectations" (Focus Group Participant, October 2016).

Goal 4 is *MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need*. This was the second highest rated goal and accounted for \$767,876.12 or 19% of all LSTA allocations from 2012-2015. Significant outputs include the conversion of 1,144 titles from analog to digital

format, a patron outreach project (POP) which added 1,588 additional patrons, and the distribution of 1,231,614 items from 2012-2015. As one librarian noted, “We have had very positive results with TBL – quite a few patrons that use it; it is their godsend; family members were really depressed and after introduced to talking books – they are just a different person. Don’t let this ever go away – people who use it and love it. You have no vision, physical or reading disability – we have a lot of just amazing testimonials about it; our veterans’ home and nursing homes promote TBL” (Focus Group Participant, October 2016).

### **Retrospective Question A-2 and A-3 – Focal Areas and Focal Groups**

Five of the six Focal Areas have been clearly addressed and Focal Area 4 (Economic & Employment Development) will become a current and future priority through the creation of a new Lifelong Learning full-time position. Three focal groups were clearly addressed with substantial focus (10% or more of all LSTA funds): Individuals with disabilities, the library workforce (current and future), and families. Although less of a consensus among staff, children (0-5) and school-aged youth (aged 6-17) have also been somewhat addressed.

### **Process Questions B1-B3**

SPRs have been used to help guide overall activities although the previous text-based only format made it much more difficult to use than the new more quantitative input, output, and outcome-based system (B-1). No major changes were made to the 2013-2017 five-year plan despite significant staffing turnover and some major cuts in state-level funding (B-2). SPRs are widely shared and disseminated with MSL stakeholders (B3).

### **Methodology Questions C1-C4**

An objective, outside, third-party evaluator was selected and conducted the evaluation in a valid and reliable fashion utilizing a full evaluation plan, evaluation cross-walk, and evaluation logic-model (C1). A mixed-method approach was used collect and analyze data using qualitative and quantitative methodology. This included the use of interviews, focus groups, survey, and site visits as well as analysis of 10-years of Montana public library statistics using Pearson-R correlation, ANOVA, and linear regression (C2). All major stakeholders were included in the sample – staff, administrative committees, librarians, and patrons. Sampling included stratified sampling intended to ensure diverse perspectives in terms of types of libraries from different regions of the state. In addition, 100 residents from each of the six federations were randomly selected and mailed a print survey. The total sample for the evaluation was 253 participants. This included interviews (n=5), focus groups (six focus groups, n=23), four site visits spanning five days in Montana (four different libraries were visited), and a community wide survey administered to the general public (N=161) and also mailed to a random sample (N=54) (C3). Two reports will be generated from the evaluation – this full report and a refined final report that will be submitted to IMLS that adheres to its established page limits. The reports will be widely shared with all MSL stakeholders and major findings and recommendations will be disseminated on a specially designed website (C4).

## Future IMLS Priorities, Focal Areas, and Focal Groups for 2018-2022

The patron random sample's IMLS priorities were 1 (Expand services for learning and access to information and educational resources in a variety of formats), 8 (Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks), 3 (Provide librarian training and professional development), 2 (Establish or enhance electronic and other linkages and improved coordination among and between libraries), and 7 (Target library and information services to persons having difficulty using a library and to underserved urban and rural communities). A composite ranking for staff, librarians, the SLC/NAC and the random sample found the same five IMLS priorities.

The randomly sampled patrons selected its top Focal Area Priorities as Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Civic Engagement (Focal Area 6), and Human Services (Focal Area 5). The composite rankings were Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Institutional Capacity (Focal Area 3), and Human Services (Focal Area 5), and introduced Institutional Capacity as a higher priority than Civic Engagement. Focus groups with library directors, however, identified a different set of IMLS Focal Area priorities – Institutional Capacity (Focal Area 3), Information Access (Focal Area 2), Economic & Employment Development (Focal Area 4), Lifelong Learning (Focal Area 1).

The patron random sample prioritized school-aged youth, families, children, individuals with limited functional literacy, individuals with disabilities, and library workforce as their top priorities. The composite rankings identified the same five groups.

## Recommendations

1. Continue improving evaluation activities by developing an evaluation process aligned with the State Library's new strategic plan and three strategic directions. Ensuring that LSTA allocations, inputs, outputs, and outcomes are meeting your long-term goals as an organization will both help with internal decision-making but also serve as opportunity for clear dialogue with internal and external stakeholders about meeting their needs.
2. Utilize a logic model as both a real-time planning and evaluation tool to ensure all LSTA allocations are identified as inputs toward, and are aligned to, specific LSTA five-year goals. This will also assist you in documenting data that will be required by the new IMLS SPR system.
3. Prioritize the following IMLS Priorities:
  - IMLS Priority 1 – Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills.



- IMLS Priority 8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks.
  - IMLS Priority 3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services.
  - IMLS Priority 2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services.
  - IMLS Priority 7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved.
4. Prioritize the following IMLS Measuring Success Focal Areas:
- Information Access (Focal Area 2) – the demand for digital resources should only continue to grow and are particularly important in Montana because of its geography and low population density. Consider lending programs that emphasize mobile technology that is preloaded with desired digital information and/or uses prepaid cellular or satellite-based networks<sup>1</sup> for connectivity in rural areas with no traditional broadband access (e.g. tablets with prepaid set of minutes through cellular or satellite company).
  - Civic Engagement (Focal Area 6) - support all libraries in educating their communities about the role libraries play in today’s society and the suite of resources and services that are now available to them. The high return-on-investment libraries represent cannot be fully realized if many members of the community do not use them. In addition, 6.1 (improve users’ ability to participate in their community) was the highest ranked focal area intent. In addition, supporting tribal college libraries and helping tribal nations build closer partnerships and relationships with public libraries can serve as a nexus for increased cultural understanding, collaboration, and investment in the future that benefits everyone.
  - Lifelong Learning (Focal Area 1) – continue focusing on programming and other resources and services for seniors/ adults, young adults, and children.
  - Economic & Employment Development (Focal Area 4) – provide training, programming, and resources to support libraries in Montana communities to help them serve as community hubs and to help facilitate redefining workforces as

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<sup>1</sup> Broadband Satellite Networks by 2019, <http://www.theverge.com/2016/2/10/10958952/boeing-viasat-fast-internet-developing-countries-rural-homes>

- worldwide consumption of fossil fuels continues to diminish. Technology access and the requisite digital literacy necessary to negotiate it are prerequisites to succeed in today’s workforce. While ranked #11 in the composite rankings, focus groups with library directors identified this as a high priority for most of them, which parallel the statewide economic transition from fossil fuels to other economies.
- Institutional Capacity (Focal Area 3) – in order for libraries to best serve their communities they must be accessible in terms of facilities, hours, well-trained staff, resources, and services. 3.2. (Improve the library’s physical and technological infrastructure) and 3.1. (Improve the library workforce) were ranked #6 and #8 in the survey composite rankings.
  - Human Services (Focal Area 5) - 5.2. (Improve users’ ability to apply information that furthers their personal or family health & wellness) and 5.3. (Improve users’ ability to apply information that furthers their parenting and family skills) were ranked #7 and #10, respectively and 5.1 (Improve users’ ability to apply information that furthers their personal, family, or household finances) is also pivotal for strengthening the overall economy.
5. Prioritize the following Focal Groups as significant funding priorities (10% or more of LSTA funding):
    - a. school-aged youth
    - b. families
    - c. children
    - d. individuals with limited functional literacy
    - e. individuals with disabilities, and
    - f. library workforce
    - g. Ethnic or minority populations – specifically tribal members and tribal nations
    - h. Individuals that are unemployed/underemployed
  6. Support libraries in providing robust support of information access to high priority information and entertainment sources in print and digital formats when applicable:
    - a. Weather
    - b. Email
    - c. News: local, national, and world
    - d. Smartphones (e.g. mobile apps)
    - e. Information around outdoor leisure activities
  7. Seek to assist libraries in increasing library inputs that have been found to be correlated to quality-of-life factors at positive and statistically significant levels including:
    - a. Library per capita income
    - b. Percent of registered borrowers
    - c. Weekly hours of main branch
    - d. Full-time staff with a professional MLS degree
    - e. Increasing programs and program attendance

- f. Increasing circulation (all types)
- 8. Use advanced statistical analysis centered around 10-year data trends and significant correlations and analysis of variance for each county and federation to help inform and support the positive impact local libraries are having on their respective communities and quality-of-life.

## Evaluation Report

### I. The State of Montana and Libraries in 2017

#### Montana Compared to National Averages

As of 2016, Montana’s population is approximately 989,414 people located within 145,545.80 square miles with a population per square mile density of 6.8 compared to the national average of 87.4. Population growth over the past six years (2010-2016) has been 5.4%, which is slightly higher than the national average (4.7%). In terms of age, Montana’s population is slightly under the national average in terms of population under 5 years old (6.0 to 6.2%) and under 18 (6.3 to 6.5%) but exceeds the national average in population over 65 (17.2% to 14.9%). Racially, Montana exceeds the national average in population that is White (89.2% to 77.1%) and American Indian and Alaska Native (6.6% to 1.2%) with much smaller percentages of the population that is Black or African American (0.6% to 13.3%), Asian (0.8% to 5.6%), or of Hispanic or Latino ethnicity (3.6% to 17.6%)<sup>2</sup>.

Quality-of-life indicators suggest both positives and negatives in comparison to national averages. On the positive end, a higher percentage of Montana’s population live in owner-occupied housing (67.2% to 63.9%), with a higher property value (\$193k to \$173k), lower median owner mortgage costs (\$1,294.00 to \$1,492.00 per month), and lower gross rent (\$711 to \$928) than the national average. In addition, more Montana residents 25 or older have a high school degree (92.8% to 86.7%) and have health insurance (14% to 10.5%) than the national average. Montanans are also on par in terms of those 25 or older with a bachelor’s degree (29.5% to 29.8%) and people 16 years or older employed (63.6% to 63.3%). In contrast, however, Montana has a lower median household income (\$47,169.00 to \$53,889.00), lower per capita income in the past 12 months (\$26,381.00 to \$28,930.00), and higher poverty rate (14.6% to 13.5%) than the national average<sup>3</sup>.

According to focus group participants, the State of Montana has one of the oldest populations in the nation and a rapidly aging workforce. Because of the “greying of Montana” it is projected that by 2030 the majority of people living here will be 65 and older and a very real worker shortage is probable. Traditionally, it has been primarily a natural resources-based economy focused on coal, timber, and oil. The economy is currently experiencing in flux with rapid changes occurring as coal usage has continued to decrease, which has drastically impacted the economy. In addition, there has been an oil boom and now an oil bust. A fundamental part of State Library funding has been tied to a coal-severance tax, but due to the downturn in coal, the percentage that goes to the Library has declined by more than one-third over the years. There is a move to try and shift some focus of the economy to manufacturing and health. Tourism is also big with two national parks. As one respondent put it, “The economy is not doing well. We are a very poor state that is very big” (Montana librarian, October 2016).

In terms of access to broadband, Montana is near last in the country (48<sup>th</sup> to 50<sup>th</sup>) and one of the most significant challenges is a lack of infrastructure and the overall cost of addressing this.

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<sup>2</sup> US Census Bureau: Montana vs. US Comparison, <http://www.census.gov/quickfacts/table/PST045216/30,00>

<sup>3</sup> Ibid

Given the geography of the state it is difficult and expensive and affordability is a major concern. There is a divide between the eastern and western parts of the state. The east is sparsely populated, rural, and has much smaller communities focused on agriculture and ranching and has an historical lack of trust with state government because of a tradition of independence. The West is where the larger cities are located and is attracting more young people because of urbanization and opportunities. There is a sense of frustration that western Montana is taking advantage of them because of greater access to resources and funding.

Cities in the western part of the state are also experiencing rapid growth. According to one focus group respondent, "...urbanization and revitalization is occurring in seven large cities in the western part of the state and the majority of the population are moving there" (Public librarian, October 2016). Affordable housing is becoming an issue, however, as many retirees or wealthy people from out-of-state have second homes, which has raised the cost of living dramatically; many of the locals are having trouble being able to afford quality housing. Montana is also 48<sup>th</sup> on the pay scale and among the highest in the nation for people having a second job.

The job opportunities in the western areas such as Missoula are mostly low paying and universities and hospitals are the largest employers. Young people are having a difficult time purchasing homes and rent is also extremely expensive. Bozeman also is facing a similar situation where the population is increasing rapidly but there is "zero affordable housing (\$325-340k) and literally no way to be able to buy a home" (Public librarian, October 2016). A larger percentage of Montanans live in rural communities and approximately 77% of Medicare recipients live 100 miles away from their healthcare provider; many have started connecting to doctors via the Web, which is referred to as telemedicine and is a growing area.

For tribal reservations, there are high instances of drug use, suicide rates, and a general sense of isolation. Unemployment, higher number of veterans, and mental health issues are also real concerns.

### The Role of Montana’s Libraries

The Eastern/Western divide appears to also be prominent among librarians. There is a general sense that Eastern Montana is not afforded as much as attention, especially since the State Library is located in Helena, which is more on the western end of the state. Montana libraries are divided into six Library Federations: Tamarack, Pathfinder, Golden Plains, Broad Valleys, South Central, and Sagebrush<sup>4</sup>.

Evaluation participants felt strongly that libraries should play a significant role in supporting the quality-of-life of its aging and

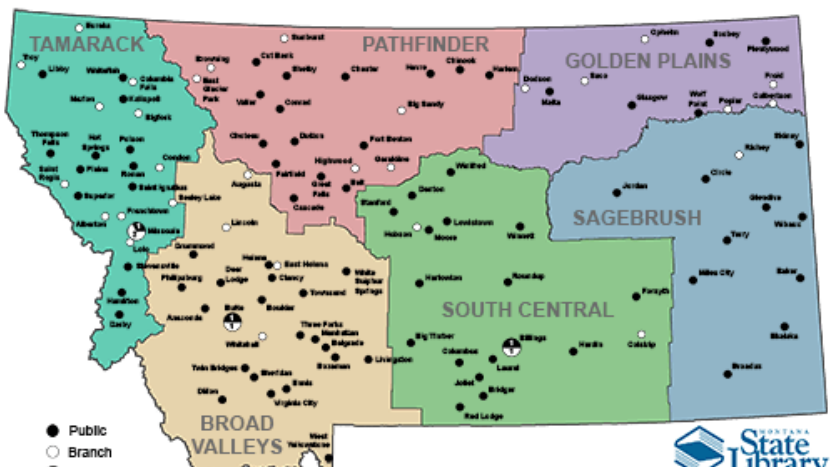


Figure 4 - Montana State Library Federations

<sup>4</sup> Montana State Library Federations, [http://msl.mt.gov/library\\_development/consulting/federations/](http://msl.mt.gov/library_development/consulting/federations/)

increasingly senior population. There has been a tradition of taking research-based approaches to early-literacy and the same could be done for seniors with an emphasis on life-long learning and other resources and services that support them.

Libraries are also a safe place for communities to gather. For smaller libraries in rural areas, their communities are close knit and everyone knows everyone. Libraries are often the only place for Wi-Fi and connectivity to the Internet and they serve as community hubs and community spaces. One librarian participant on the eastern end of the state noted, “we are tenacious and do amazing things with hardly anything and it is very hard to ask for help and aid although we desperately need it; we are isolated - both the geography and our economy. We feel we have less resources than other regions; we are good at sharing though what little resources we do have” (Librarian, October 2016). Their community had hoped for an oil boom but it did not materialize and a lot of people are looking for jobs. The library has become the job center and is the hub of the community and free source of resources, education, training, and entertainment – proctoring online courses, library programs, helping schools with library programs, and summer reading. People are coming as far as 90 miles to attend their programs. In Miles City, they try and provide as many programs as possible especially for the elderly; many people come for the social opportunities as well as grocery shopping and it really is one of the hubs of Eastern Montana. Outreach and marketing is the key to letting people know what is available for them while they pass through.

On the western end of the state there are still significant connectivity issues. One participant estimated that in Missoula close to 40% of people do not have access to the Internet. Because of explosive growth and rapid development, the infrastructure is often not present to support broad band connectivity even in newer developments. Their library is heavily used for its Wi-Fi and connectivity. The library can and should also serve as the community cultural center – free entertainment, arts & culture, programming (especially focused on financial literacy), and even bookmobiles on the road that can bring services to the people. Missoula even has a technology bus that visits senior homes and partners with a lot of agencies to provide a place to connect with people. They also have a very strong volunteer corps largely comprised of retired seniors. While more bookmobiles have been rising in Montana to provide essential outreach, there is also the possibility of opening up small branches in partnership with schools (e.g. they provide the space and we provide the staff) to provide greater access to both connectivity and resources to rural, underserved areas. Ironically, despite the rapidly increasing population Missoula’s budget continues to be cut.

In general, participants felt that libraries needed to continue serving as community hubs to provide access to a suite of high priority resources and services such as Wi-Fi and technology, programming for all ages but especially in terms of work force development and job skills and senior services (children and youth services are the highest priority but librarians feel they are doing a pretty good job here already), access to free entertainment, continued access to digital services (e.g. Montana Shared Catalog and MontanaLibrary2Go, etc.), and a safe place for socializing, meeting, and discussing pressing community issues. Although staff and resources are limited, libraries must continue to serve as mediators and leaders that people trust in the community to provide resources the communities need. Although it is recognized that libraries cannot be everything to everyone, they are still committed to trying very hard to be.

Training, user education, and outreach are also critical. Both librarians and their patrons need to

get up to speed with technology through digital literacy and all of the other different programs and services (e.g. workforce development, senior programming, etc.) being asked of libraries. User education and marketing what the library has to offer is also essential. As one participant noted, “Since 2002, at every event held someone says, “...oh, this is the first time I’ve been here” (Focus Group Participant, October 2016). For Native American tribes and tribal members there is also a concern that there are often not a lot of options and clearly increased library services could help many of them break the cycle of poverty that they are in. Some libraries are also facing an influx of immigrants that are unable to speak English.

### Major Ways the State Library Can Help

Libraries were extremely satisfied with the State Library and as one participant noted, “it is doing a great job” (Focus Group Participant, October 2016). Several major themes arose during the librarian focus groups in ways the State Library could help Montana’s libraries. First, is supporting libraries in an economically distressed climate where people continue to turn to libraries for help while library budgets are getting cut and digital demands are increasing. The phrase, “we are struggling” was mentioned repeatedly by all types of libraries and seemed to focus around trying to serve an increasingly economically disenfranchised patron base while budgets are being reduced and costs continue to rise. The growing cost of being a member of the Montana Shared Catalog and the loss of the EBSCO databases for school libraries was a recurring theme.

The second theme was the need for support in workforce development, digital literacy, and access to the Internet. These three are closely linked together as people without jobs come to libraries often without access to the Internet and without the digital literacy skills necessary to negotiate an increasing digital world. As one participant noted, “Despite our struggles – libraries need to be in a leading role in our communities and serve those who are economically strapped; we need to be taking more of a community leadership role, especially in employment development” (Focus Group Participant, October 2016). The role of the State Library could be to “help facilitate communication and coordinate partnerships with employment/workforce development (STEM/STEAM agenda is big in Billings) and serve as an access point for the Internet” (Focus Group Participant, October 2016).

A third theme was the need for outreach and closer partnerships with other community organizations as the general consensus is that a lot of the communities they served were not aware of the resources and services their libraries had to offer. Increased outreach means closer partnerships with organizations also serving patrons in workforce development, digital literacy, and education. This certainly includes k-12 schools as one participant noted, “we have desire for a deeper partnership with our local k-12 schools; the library should reflect the curriculum of the schools. School librarians are vitally important but their role is changing” (Focus Group Participant, October 2016). Another noted, “we are doing a good job of promoting literacy but we have not done a lot of collaboration in the schools” (Focus Group Participant, October 2016). This outreach also must prioritize people in rural areas who either cannot conveniently access library services or are not aware of them.

The fourth theme is that Montana is already doing a great job of sharing resources and to continue making this a focal point, especially through digital access like the Montana Shared Catalog and MontanaLibrary2Go. One participant noted, “Keep improving the ability to share

items with libraries across the state – resource sharing is critical; what is most amazing is that we share things across such a broad distance” (Focus Group Participant, October 2016). Another participant noted her strong support for the way the State Library is using funds in a centralized fashion to help all libraries, “MSL knows that we will be frugal and financially responsible; we would not be as successful if we had a stricter and narrower focus on these funds. The shared catalog and being able to search each other’s collections is a crucial aspect of how we serve patrons” (Focus Group Participant, October 2016).

Lastly, there was some concern about the graying of the field and the ability to find qualified staff to work in libraries currently and into the future. While the use of part-time staff was helpful the need for full-time professional librarians with an MLS degree was essential and at times were hard to find. The State Library could help to ensure there are enough young professional librarians in the pipeline for the future.

**Montana Library Trends: 2006-2015**

Ten years of public library data for all Montana public libraries from 2006-2015 was analyzed to identify any major changes over time. Because all library data was used, the statistical measure one-way analysis of variance (ANOVA) was run. ANOVA computed and compared means of each statistic across ten years and identified statistically significant changes at a probability level of p=.05, which means there is only a 5% chance the change found was due to chance as opposed to representing a real difference.

**Public Library Income**

Montana library funding continues to be strong and saw statistically significant increases in two income areas - Income Per Capita (Service Population) and State Income Per Capita/Per Square Mile. Income Per Capita (Service Population) increased by 23% from \$26.02 in 2006 to \$34.01 in 2015.

*Table 1 - Average Income Per Capita (Service Population) from 2006-2015*

		N	Mean	Maximum
Income - Per Capita (Service Population)	2006	80	\$ 26.02	\$ 199.45
	2007	80	\$ 25.67	\$ 97.84
	2008	80	\$ 27.52	\$ 93.80
	2009	80	\$ 29.58	\$ 103.53
	2010	80	\$ 31.78	\$ 106.94
	2011	81	\$ 29.79	\$ 101.68
	2012	82	\$ 29.77	\$ 124.47
	2013	82	\$ 31.51	\$ 124.90
	2014	82	\$ 33.68	\$ 136.85
	2015	82	\$ 34.01	\$ 120.27
	Total	809	\$ 29.95	\$ 199.45
	Change		23%	



State Income Per Capita/Per Square Mile also increased significantly by 72% from \$1,327.99 in 2006 to \$4,810.45 in 2015.

Table 2 - Average State Income Per Capita/Per Square Mile from 2006 to 2015

		N	Mean	Maximum
Income - State - Per Capita/Per Square Mile	2006	80	\$ 1,327.99	\$ 12,322.00
	2007	80	\$ 1,280.96	\$ 12,322.00
	2008	80	\$ 1,269.66	\$ 12,322.00
	2009	80	\$ 1,280.36	\$ 12,322.00
	2010	80	\$ 1,283.09	\$ 12,322.00
	2011	81	\$ 1,257.81	\$ 12,322.00
	2012	82	\$ 1,242.45	\$ 13,026.00
	2013	82	\$ 1,249.88	\$ 13,026.00
	2014	82	\$ 4,810.45	\$ 50,133.00
	2015	82	\$ 4,810.45	\$ 50,133.00
Total		809	\$ 1,990.77	\$ 50,133.00
		Change	72%	

Local support from cities has also continued to increase over the years (except for 2012).

Table 3 - Average Library City Income from 2006-2015

		N	Mean	Maximum
Income - City	2006	80	\$ 69,713.66	\$1,708,022.00
	2007	80	\$ 72,736.61	\$1,713,790.00
	2008	80	\$ 77,007.74	\$1,792,506.00
	2009	80	\$ 99,950.70	\$1,948,285.00
	2010	80	\$107,218.85	\$1,955,178.00
	2011	81	\$110,233.16	\$2,077,614.00
	2012	82	\$108,632.98	\$2,043,261.00
	2013	82	\$112,103.22	\$2,084,607.00
	2014	82	\$116,286.22	\$2,157,146.00
	2015	82	\$117,829.11	\$2,340,621.00
Total		809	\$ 99,328.70	\$2,340,621.00
		Change	41%	

County support for libraries has also remained stable and increased consistently over the years.

Table 4 - Average County Library Income from 2006 to 2015

		N	Mean	Maximum
Income - County	2006	80	\$142,422.69	\$2,238,838.00
	2007	80	\$148,056.76	\$2,411,618.00
	2008	80	\$169,429.68	\$2,672,110.00
	2009	80	\$161,348.24	\$2,535,196.00

	2010	80	\$154,832.23	\$2,375,380.00
	2011	81	\$163,619.86	\$2,725,274.00
	2012	82	\$162,909.65	\$2,680,669.00
	2013	82	\$171,293.73	\$2,767,134.00
	2014	82	\$183,597.95	\$2,954,951.00
	2015	82	\$195,361.71	\$3,289,770.00
	Total	809	\$165,413.78	\$3,289,770.00
		Change	27%	

State support has also remained consistently strong.

Table 5 - Average State Library Income from 2006 to 2015

		N	Mean	Maximum
Income - State - Total	2006	80	\$ 5,680.94	\$ 69,103.00
	2007	80	\$ 5,086.36	\$ 72,881.00
	2008	80	\$ 5,595.56	\$ 75,087.00
	2009	80	\$ 5,598.43	\$ 73,055.00
	2010	80	\$ 5,660.49	\$ 67,518.00
	2011	81	\$ 5,605.62	\$ 65,876.00
	2012	82	\$ 3,381.11	\$ 20,696.00
	2013	82	\$ 3,388.48	\$ 20,685.00
	2014	82	\$ 6,949.13	\$ 51,663.00
	2015	82	\$ 6,930.13	\$ 51,688.00
	Total	809	\$ 5,385.67	\$ 75,087.00
		Change	18%	

Bottom line, Montana has supported its libraries consistently over the past 10 years at city, county, and state levels. To see all data tables please [see Appendix A](#).

### Public Library Capital and Expenditures

No significant differences were found in library capital and expenditures as overall averages increased and decreased from year to year from 2006-2015. Total Capital Revenue from all sources for Montana public libraries fluctuated with spikes in 2006, 2007, 2013, and 2014. The table below shows all capital revenue.

Table 6 – Average Total Capital Revenue for Montana Public Libraries (2006-2015)

		N	Mean	Maximum
Capital Revenue - Total	2006	80	\$ 83,183.41	\$ 6,048,337.00
	2007	80	\$ 59,585.61	\$ 3,319,021.00
	2008	80	\$ 18,452.38	\$ 880,000.00
	2009	80	\$ 11,946.61	\$ 387,671.00
	2010	80	\$ 12,911.68	\$ 309,723.00
	2011	81	\$ 5,668.37	\$ 200,414.00
	2012	82	\$ 19,443.71	\$ 514,893.00

2013	82	\$138,374.78	\$10,258,440.00
2014	82	\$ 93,552.43	\$ 7,147,527.00
2015	82	\$ 32,761.62	\$ 1,921,579.00
Total	809	\$ 47,768.09	\$10,258,440.00

Local Capital Revenue also widely fluctuated with spikes in 2006, 2007, 2012, 2014 and 2015.

Table 7-Average Local Capital Revenue for Montana Public Libraries (2006-2015)

	N	Mean	Maximum	
Capital Revenue - Local	2006	80	\$ 42,490.70	\$ 2,848,337.00
	2007	80	\$ 44,271.09	\$ 3,319,021.00
	2008	80	\$ 3,882.24	\$ 242,004.00
	2009	80	\$ 9,527.19	\$ 387,671.00
	2010	80	\$ 6,286.94	\$ 243,955.00
	2011	81	\$ 2,642.15	\$ 200,414.00
	2012	82	\$ 15,479.48	\$ 514,893.00
	2013	82	\$ -	\$ -
	2014	82	\$ 92,615.29	\$ 7,147,527.00
	2015	82	\$ 30,325.05	\$ 1,921,579.00
Total	809	\$ 24,822.11	\$ 7,147,527.00	

Library expenditures also show wide fluctuations across the state. For all statistics and tables please [see Appendix A](#). The findings suggest that both library capital revenue (one time investments) and expenditures have widely fluctuated over the past 10 years with no trend upwards or downwards.

### Libraries and Library Resources

Overall, the number of libraries and library resources have continued to grow, although not statistically significant. Five libraries have a book mobile with three libraries adding one from 2013-2015 - Missoula in 2013, Lewis and Clark in 2014, and Sidney-Richland in 2015. [See Appendix A](#) for all 10-year public library statistics from 2006-2015.

The total number of state library recognized libraries increased from 80 to 82 with one library being added in 2011 and a second one added in 2012. The general service population increased by 7% from 2006 to 2015 with a slight decrease in 2015. Overall library square footage also increased by 7% from 2006 to 2015.

### Registered Patrons and Service Hours

The average number of registered patrons has remained consistent over the years, a 12% increase from 2006 to 2015, but decreased slightly from 2014 to 2015.

Table 8 - Average Registered Patrons from 2006 to 2015

	N	Mean	Std. Deviation	95% Confidence Interval for Mean	Minimum	Maximum
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					Lower Bound	Upper Bound		
Registered Borrowers	2006	80	4927.79	9452.79	2824.17	7031.4	0	51559
	2007	80	5302.35	9889.741	3101.5	7503.2	0	56519
	2008	80	5591.04	10488.51	3256.93	7925.14	0	58992
	2009	80	5528.89	10664.96	3155.52	7902.26	95	64545
	2010	80	5598.68	10833.06	3187.9	8009.45	87	63342
	2011	81	5769.17	12185.67	3074.7	8463.65	80	77000
	2012	82	5661.73	12179.6	2985.58	8337.88	87	75457
	2013	82	5880.66	12535.47	3126.31	8635	110	72700
	2014	82	5877.23	12356.69	3162.17	8592.3	98	77085
	2015	82	5622.99	11105.66	3182.81	8063.17	89	59581
	Total	809	5578.12	11167.77	4807.41	6348.83	0	77085
	Change	12%						

The overall percentage of service population registered also has remaining relatively consistent around 50% from 2006 to 2015 with slight decreases in 2011, 2012, and 2013.

Table 9 - Average Percent of Service Population Registered from 2006 to 2015

		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Registered Borrowers - Percent Registered	2006	80	47.9334	26.80078	41.9692	53.8976	0	141.72
	2007	80	49.7538	23.64375	44.4921	55.0154	0	141.72
	2008	80	52.9619	22.13126	48.0368	57.8869	0	135.16
	2009	80	52.2343	21.56979	47.4341	57.0344	13.79	112.92
	2010	80	52.1694	22.75973	47.1044	57.2343	14.41	136.4
	2011	81	47.866	21.81235	43.0429	52.6892	14.87	146.3
	2012	82	47.7013	24.80967	42.2501	53.1526	15.17	160.24
	2013	82	49.484	25.7582	43.8243	55.1437	15.39	169.33
	2014	82	50.0117	26.70658	44.1436	55.8798	15.25	187.09
	2015	82	51.2639	29.29326	44.8275	57.7003	14	205.18
	Total	809	50.13	24.60037	48.4323	51.8277	0	205.18
	Change	6%						

Main library service hours also have remained relatively static averaging 39.33 hours per week.

Table 10 - Average Main Library Service Hours from 2006 to 2015

		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Main - Weekly Hours	2006	80	37.95	12.37	35.2	40.7	15	64
	2007	80	38.3	12.665	35.48	41.12	15	64
	2008	80	38.5	12.703	35.67	41.33	15	64
	2009	80	38.85	12.452	36.08	41.62	15	64
	2010	80	39.15	12.146	36.45	41.85	15	64
	2011	81	39.52	11.878	36.89	42.14	15	64
	2012	82	40.23	11.374	37.73	42.73	15	63

	2013	82	40.45	11.327	37.96	42.94	15	63
	2014	82	40.02	11.487	37.5	42.55	15	63
	2015	82	40.22	11.334	37.73	42.71	15	63
	Total	809	39.33	11.943	38.5	40.15	15	64
	Change		6%					

Average weekly service hours increased consistently and by 10% over the past 10 years.

Table 11 - Average Weekly Service Hours from 2006 to 2015

	N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum	
				Lower Bound	Upper Bound			
Service Hours - All - Weekly Hours	2006	80	46.49	27.393	40.39	52.58	15	179
	2007	80	46.6	27.206	40.55	52.65	15	179
	2008	80	47.69	28.143	41.42	53.95	15	179
	2009	80	48.21	27.974	41.99	54.44	15	179
	2010	80	48.59	28.221	42.31	54.87	15	179
	2011	81	50.16	29.776	43.58	56.74	15	169
	2012	82	50.78	29.847	44.22	57.34	15	181
	2013	82	51.87	32.785	44.66	59.07	15	221
	2014	82	51.73	32.218	44.65	58.81	15	213
	2015	82	51.76	31.818	44.76	58.75	15	213
	Total	809	49.41	29.53	47.37	51.45	15	221
	Change		10%					

## Circulation

Overall circulation increased by 34% from 2006 to 2012, dropped by 17% from 2012 to 2013 and has been increasing steadily since.

Table 12 - Average Circulation from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Circulation - Total	2006	80	68411.98	34900.15	101923.8	257	905836
	2007	80	70078.13	35277.84	104878.41	649	946884
	2008	80	72901.06	36825.86	108976.27	690	951537
	2009	80	78051.45	39165.58	116937.32	650	979928
	2010	80	84402.49	40035.58	128769.4	658	1205188
	2011	81	92827.4	33345.2	152309.59	900	2045346
	2012	82	91894.52	32197.93	151591.12	1094	2151460
	2013	82	76314.8	36002.99	116626.62	1252	1148006
	2014	82	72459.24	36676.92	108241.57	426	814233
	2015	82	74068.66	36085.6	112051.71	512	943285
	Total	809	78164.5	64762.9	91566.1	257	2151460
	Change		8%				

The figure below shows the variations in overall circulation.

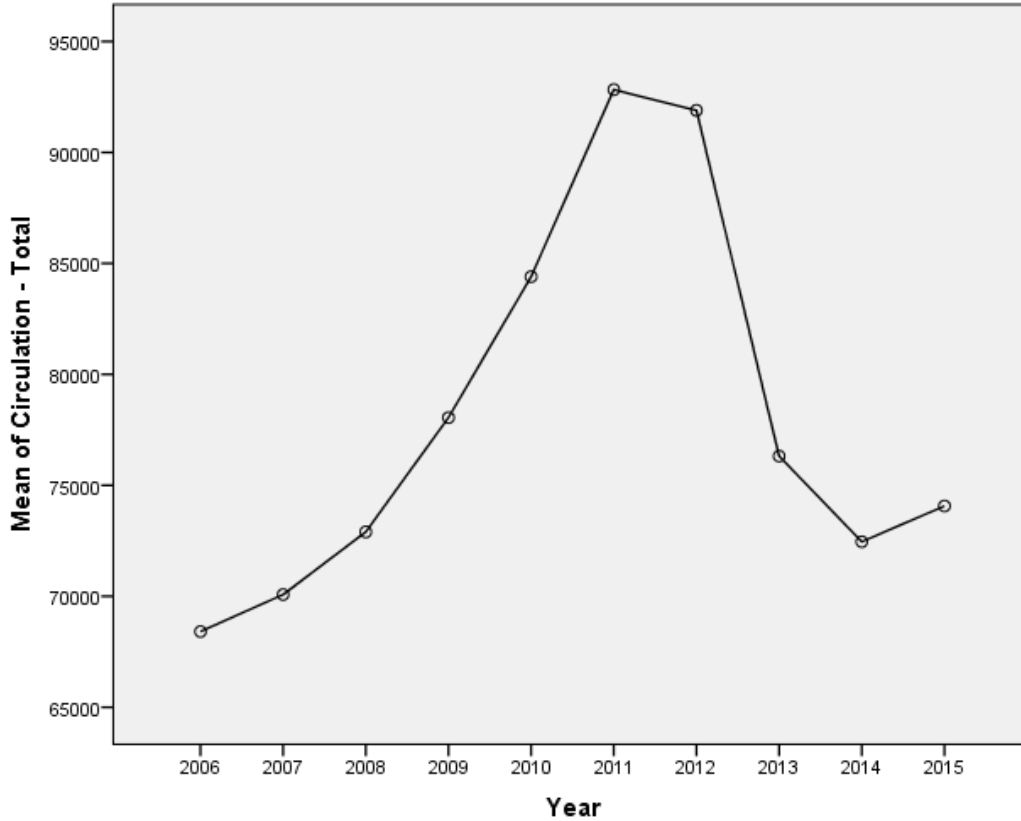


Figure 5 - Average Circulation from 2006 to 2015

Juvenile collection circulation has remained consistent and increased by 12% over the past 10 years.

Table 13 - Average Juvenile Collection Circulation from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Circulation - Juvenile - Annual	2006	80	22824.81	10951.08	34698.55	0	307161
	2007	80	23719.86	11106.78	36332.95	0	322794
	2008	80	23093.53	10845.59	35341.46	0	322858
	2009	80	25381.78	11580.87	39182.68	0	338926
	2010	80	25810.84	12011.27	39610.41	0	318320
	2011	81	25910.88	11722.75	40099	0	326088
	2012	82	25028.17	12122.3	37934.04	-1	290908
	2013	82	24904.65	11582.94	38226.36	0	311219
	2014	82	25807.89	11761.56	39854.22	0	312584
	2015	82	25933.41	11738.25	40128.58	0	320902
	Total	809	24848.61	20712.53	28984.69	-1	338926
	Change	12%					

The figure below shows the overall trends in juvenile circulation.

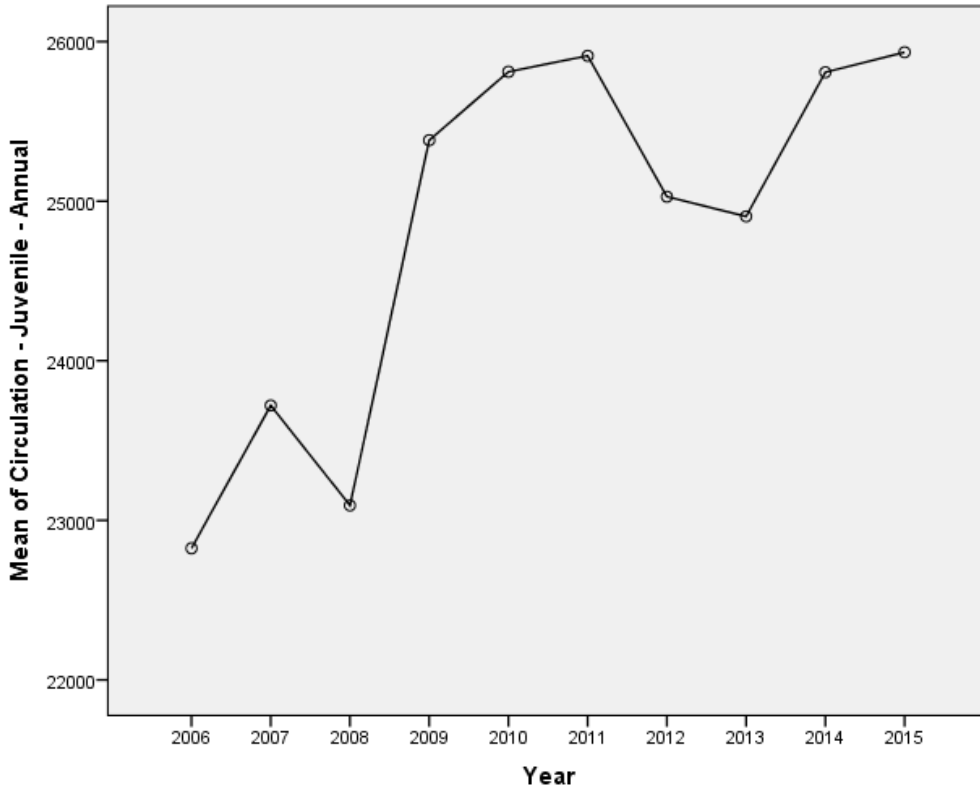


Figure 6 - Average Juvenile Circulation from 2006 to 2015

Adult collection circulation has fluctuated, increasing by 47% from 2006 to 2011 and then decreasing by 23% from 2012 to 2013. Overall circulation has increased by 5% over the past 10 years.

Table 14 - Average Non-Juvenile Circulation from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Circulation - Non-juvenile - Annual	2006	80	45587.16	23858.22	67316.1	153	598675
	2007	80	46358.26	24064.31	68652.22	250	624090
	2008	80	49807.54	25655.51	73959.56	265	628679
	2009	80	52669.68	27450.45	77888.9	250	641002
	2010	80	58591.65	27525.12	89658.18	178	920827
	2011	81	66916.52	19694.23	114138.81	588	1746477
	2012	82	66866.35	17603.47	116129.24	679	1895584
	2013	82	51410.16	24094.85	78725.47	725	836787
	2014	82	46651.35	24791.6	68511.1	0	501649
	2015	82	48135.24	24183.36	72087.13	0	625244
	Total	809	53315.89	43660.83	62970.96	0	1895584

		Change	5%				
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Circulation Per Capita (Service Population) has remained steady with a small 2% decrease over the past 10 years.

Table 15 - Average Circulation Per Capita (Service Population) from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Per Capita (Service Population)	2006	80	6.2776	5.283	7.2722	1.33	29.08
	2007	80	6.0115	5.0656	6.9574	0.38	34.21
	2008	80	6.3279	5.3966	7.2592	0.4	31.36
	2009	80	6.5946	5.6971	7.4922	0.38	26.56
	2010	80	6.937	5.7761	8.0979	0.38	35.32
	2011	81	6.4637	5.3829	7.5445	1.62	34.67
	2012	82	6.4121	5.3807	7.4435	1.78	37.3
	2013	82	6.023	5.0523	6.9938	1.91	36.03
	2014	82	5.9749	4.9173	7.0325	0.86	37.89
	2015	82	6.1645	4.9837	7.3453	1.03	41.91
	Total	809	6.3171	5.997	6.6372	0.38	41.91
		Change	-2%				

Statistics for electronic circulation first were collected in 2013 and shows a rapid 46% increase from 2013 to 2015.

Table 16 - Average Electronic Circulation from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Electronic	2006	0	.	.	.	.	.
	2007	0	.	.	.	.	.
	2008	0	.	.	.	.	.
	2009	0	.	.	.	.	.
	2010	0	.	.	.	.	.
	2011	0	.	.	.	.	.
	2012	0	.	.	.	.	.
	2013	82	3982.01	1765.17	6198.85	0	59451
	2014	82	9566.8	256.62	18876.99	0	374769
	2015	82	7362.88	3534.68	11191.07	0	94329
	Total	246	6970.57	3570.79	10370.34	0	374769
		Change	46%				



### Programs and Attendance

Consistent with national trends, statistically significant increases were found in programs offered for youth, adults, and overall; program attendance also increased consistently although not quite at statistically significant levels.

Children’s programs increased by 42% from 2006 to 2015, but was not statistically significant because of a small decline in 2013.

Table 17 - Average Children's Programs from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs - Children	2006	80	76.48	55.65	97.3	0	372
	2007	80	78.38	56.51	100.24	1	431
	2008	80	82.3	59.82	104.78	1	451
	2009	80	93.09	67.86	118.32	0	493
	2010	80	102.4	73.73	131.07	0	618
	2011	81	108.35	77.79	138.91	1	695
	2012	82	115.82	85.13	146.51	1	667
	2013	82	123.5	75.89	171.11	0	1716
	2014	82	114.01	85.25	142.77	0	682
	2015	82	131.39	95.19	167.59	0	792
	Total	809	102.76	93.25	112.28	0	1716
	Change	42%					

The figure below shows the increase of children’s programming over the past ten years.

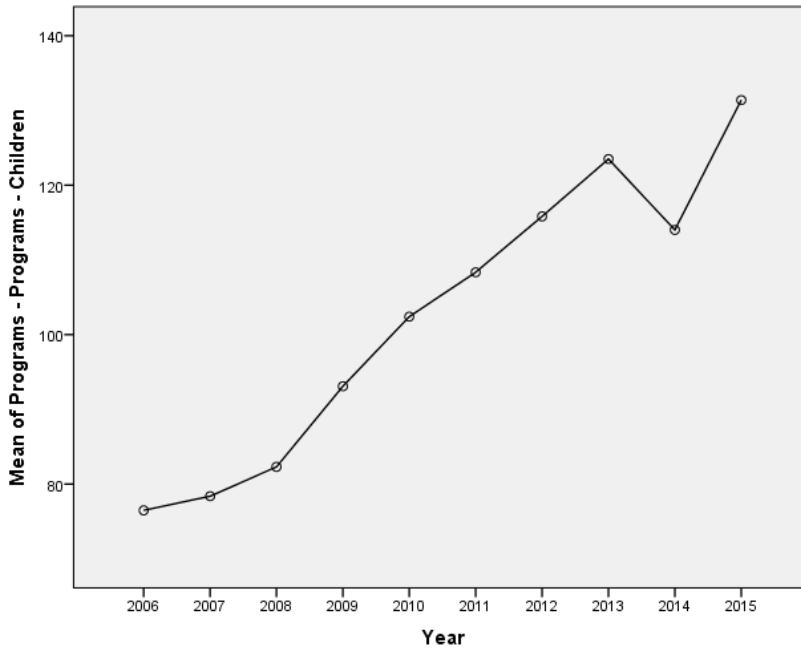


Figure 7 - Average Children's Program from 2006 to 2015

Programs for young adults increased by 79% over the past ten years, which was a statistically significant increase.

Table 18 - Average Young Adult Programs from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Programs - Young Adult	2006		
	2007	80	5.2	3.27	7.13	0	41
	2008	80	8.89	4.34	13.44	0	147
	2009	80	11.18	5.97	16.38	0	164
	2010	80	12.63	6.64	18.61	0	178
	2011	81	13.84	7.5	20.18	0	173
	2012	82	15.8	7.65	23.96	0	260
	2013	82	15.2	7.87	22.52	0	208
	2014	82	14.6	8.76	20.44	0	183
	2015	82	19.9	8.75	31.05	0	362
	Total	809	12.18	10.15	14.2	0	362
	Change		79%				

Adult programs also increased by 59%, which also was as statistically significant increase.

Table 19 - Average Adult Programs from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Programs - Adult	2006		
	2007	80	22.34	14.07	30.61	0	222
	2008	80	24.18	15.96	32.39	0	214
	2009	80	31.38	20.93	41.82	0	226
	2010	80	42.2	20.18	64.22	0	786
	2011	81	36.47	24.65	48.29	0	298
	2012	82	40.54	26.26	54.81	0	361
	2013	82	67.99	17.99	117.98	0	2028
	2014	82	46.15	31.29	61	0	414
	2015	82	50.96	34.3	67.63	0	462
	Total	809	38.43	31.99	44.86	0	2028
	Change		59%				

Overall programming for all groups increased by 50%, which also was a statistically significant increase.

Table 20 - Average Programming from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Programs - Total	2006		
	2007	80	105.91	76.16	135.67	1	544
	2008	80	115.36	83.01	147.71	1	690
	2009	80	135.64	99.32	171.96	0	678

	2010	80	157.23	113.11	201.34	0	857
	2011	81	158.65	116.56	200.75	1	793
	2012	82	172.16	128.12	216.2	1	849
	2013	82	206.68	105.67	307.7	0	3952
	2014	82	174.76	129.56	219.95	0	985
	2015	82	202.26	143.81	260.71	0	1350
	Total	809	153.36	137.44	169.29	0	3952
		Change	50%				

The figure below shows the overall increase in library programming from 2006 to 2015.

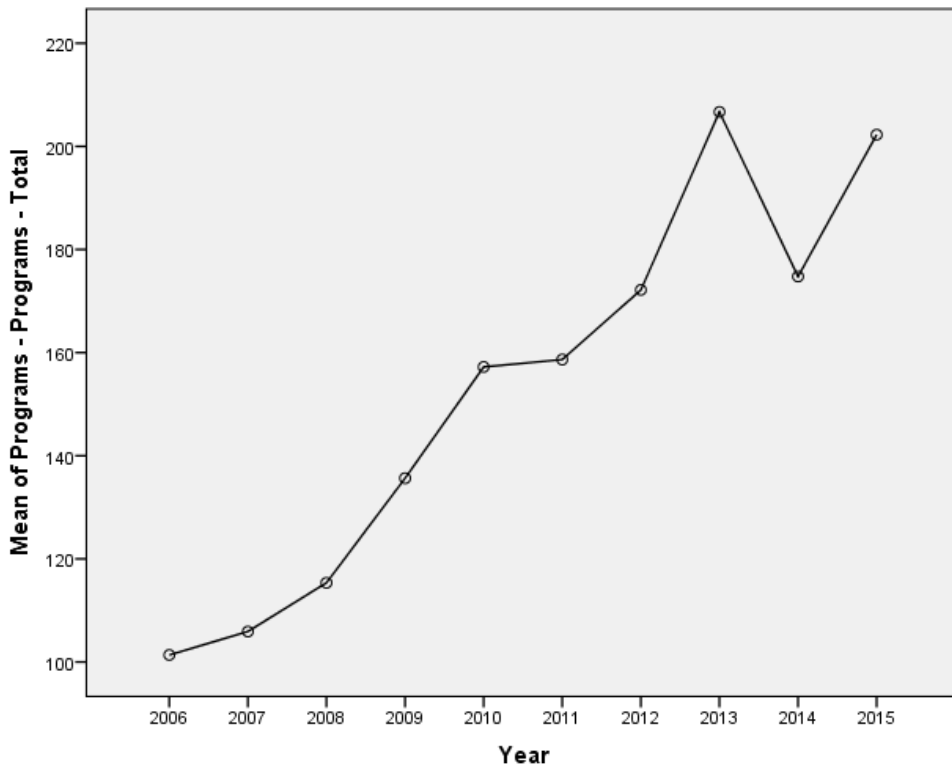


Figure 8 - Average Programs Offered from 2006 to 2015

As would be expected, attendance also grew for children, youth, and adults but not a statistically significant levels.

Attendance at children’s programs grew by 27% from 2006 to 2015.

Table 21 - Average Children Program Attendance from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Children	2006	80	1870.69	1196.19	2545.19	0	14832
	2007	80	1905.18	1197.43	2612.92	5	14683
	2008	80	1982.81	1240.83	2724.79	0	15926
	2009	80	2124.91	1340.82	2909.01	0	18419
	2010	80	2064.94	1253.74	2876.13	0	20567
	2011	81	2120.65	1329.47	2911.84	5	19866
	2012	82	2242.26	1424.26	3060.25	6	18302
	2013	82	2359.22	1401.82	3316.62	0	28000
	2014	82	2530.57	1638.79	3422.35	0	18588
	2015	82	2578.83	1604.39	3553.26	0	24418
	Total	809	2180.4	1924.73	2436.08	0	28000
	Change		27%				

Young adult program attendance increased by 56% but was not statistically significant as it decreased slightly from 2013 to 2015.

Table 22 - Average Young Adult Program Attendance from 2006 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Young Adult	2006	80	109.98	36.74	183.21	0	2577
	2007	80	163.19	59.6	266.78	0	3250
	2008	80	217.83	72.12	363.53	0	4456
	2009	80	257.81	101.7	413.93	0	4692
	2010	80	262.05	69.83	454.27	0	7148
	2011	81	285.83	57.34	514.31	0	8798
	2012	82	271.74	20.93	522.56	0	10117
	2013	82	262.35	33.53	491.18	0	9160
	2014	82	258.15	62.09	454.2	0	7762
	2015	82	250.5	37.45	463.55	0	8303
		Total	809	234.27	175.85	292.69	0
	Change		56%				

Attendance at adult programs also increased by 53% from 2006 to 2015 but also was not found to be statistically significant because of a slight decrease in 2014.

Table 23 - Average Adult Program Attendance from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs Attendance – Adult	2006	80	468.03	288.15	647.9	0	4333
	2007	80	630.71	353.36	908.06	0	8572
	2008	80	671.01	344.37	997.66	0	11069
	2009	80	799.26	390.45	1208.07	0	14310
	2010	80	832.68	330.34	1335.01	0	18705
	2011	81	908.09	399.7	1416.47	0	17996
	2012	82	968.94	441.92	1495.96	0	18658
	2013	82	1050.63	433.48	1667.79	0	17391
	2014	82	994.76	482.27	1507.25	0	17500
	2015	82	997.38	536.19	1458.57	0	15036
Total	809	833.93	693.09	974.77	0	18705	
	Change	53%					

Overall program attendance increased consistently by 36% from 2006 to 2015 but was not found to be statistically significant.

Table 24 - Average Total Program Attendance from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs Attendance – Total	2006	80	2448.69	1606.35	3291.02	0	17581
	2007	80	2699.08	1710.1	3688.05	5	22679
	2008	80	2871.65	1781.82	3961.48	0	29304
	2009	80	3181.99	1987.11	4376.87	0	31088
	2010	80	3159.66	1802.29	4517.04	0	41260
	2011	81	3314.57	1926.3	4702.84	5	42803
	2012	82	3482.94	2021.2	4944.68	6	45787
	2013	82	3672.21	2043.41	5301	0	43425
	2014	82	3783.48	2338.39	5228.56	0	35584
	2015	82	3826.71	2347.59	5305.83	0	31857
Total	809	3248.61	2840	3657.21	0	45787	
	Change	36%					

The figure below shows the steady increase in overall program attendance over the past 10 years.

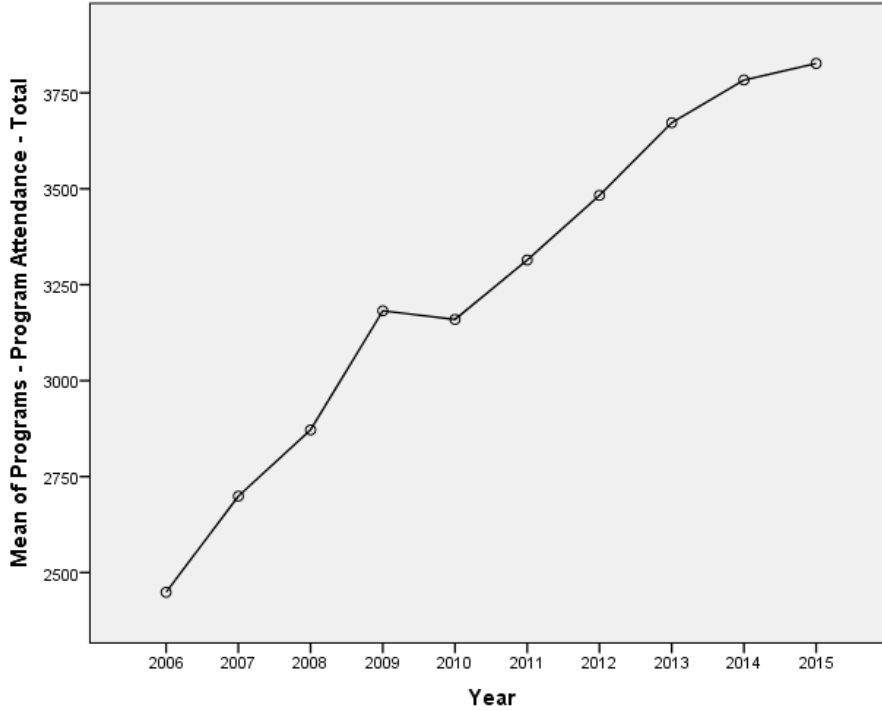


Figure 9 - Average Total Program Attendance from 2006 to 2015

The fact that library program offerings, except for children, increased at statistically significant levels while attendance did not suggest that overall community response was not as favorable and did not parallel the overall increase in offerings. Closer examination of the data suggests that children attendance represented 67% of programs offered but only grew by 27% while adult attendance and young adult programs represented collectively the remaining 33% of programs but their attendance grew by 56% and 53%, respectively.

Table 25 - Percent of Total Montana Public Library Programs from 2006- 2015

Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total
31,086	83,134	9,851	124,071
25%	67%	8%	100%

In terms of overall attendance from 2006-2015, the percentage of attendance almost mirrors their respective percentage of programs offered.

Table 26 - Percent of Total Montana Public Library Program Attendees from 2006- 2015

Program Attendance - Adult	Program Attendance - Children	Program Attendance - Young Adult	Program Attendance - Total
674,650	1,763,947	189,525	2,628,122

26%	67%	7%	100%
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When a program to attendance ratio was calculated interestingly the adult-to-attendance ratio was higher at 1 program to 21.7 attendees than both children (1/21.2) and young adults (1/19.2) program to attendance ratios.

Program to Attendance Ratio - Adult	Program to Attendance Ratio - Children	Program to Attendance Ratio - Young Adult	Program to Attendance Ratio - Total
1 to 21.7	1 to 21.2	1 to 19.2	21.2

Future implications could be to focus more on increasing adult programming (highest attendance ratio) and/or to increase potential relevance, outreach, and marketing of programs to potential attendees by working more closely with the community.

### Library Automation

Three statistically significant changes in library automation in public libraries were identified: Computers increased, full-text databases increased and then decreased dramatically, and Internet terminals increased. The table below shows the changes for each. Please see [Appendix E3](#) for a full list of all statistics analyzed.

The average number of computers increased by 38%, the number of full-text databases increased by 40% from 2006 to 2012 and then decreased significantly, and the public Internet terminals increased by 42%.

Table 27 - Library Automation: Significant Changes

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum	
					Lower Bound	Upper Bound			
Automation - Number of Internet Computers	2006	80	10.15	11.684	1.306	7.55	12.75	0	73
	2007	80	10.7	12.345	1.38	7.95	13.45	0	69
	2008	80	11.86	13.093	1.464	8.95	14.78	1	69
	2009	80	12.53	13.311	1.488	9.56	15.49	1	69
	2010	80	13.75	15.067	1.685	10.4	17.1	1	76
	2011	81	15.1	16.628	1.848	11.42	18.78	1	85
	2012	82	15.56	16.271	1.797	11.99	19.14	1	93
	2013	82	15.28	16.075	1.775	11.75	18.81	1	99
	2014	82	16.55	18.941	2.092	12.39	20.71	1	108
	2015	82	16.44	19.046	2.103	12.25	20.62	2	113
	Total	809	13.81	15.546	0.547	12.74	14.89	0	113
	Change	38%							
Automation - Online Full Text Databases	2006	80	8.26	9.385	1.049	6.17	10.35	0	66
	2007	80	9.93	12.104	1.353	7.23	12.62	0	69
	2008	80	10.66	11.735	1.312	8.05	13.27	0	69

	2009	80	10.58	11.262	1.259	8.07	13.08	0	69
	2010	80	12.63	14.216	1.589	9.46	15.79	0	76
	2011	81	13.38	15.895	1.766	9.87	16.9	0	85
	2012	82	13.84	15.007	1.657	10.54	17.14	0	93
	2013	82	0	0	0	0	0	0	0
	2014	82	0	0	0	0	0	0	0
	2015	82	0	0	0	0	0	0	0
	Total	809	7.89	12.076	0.425	7.06	8.72	0	93
	Change	40%							
Automation - Internet Terminals - Public	2006	80	9.13	10.443	1.168	6.8	11.45	1	66
	2007	80	9.78	11.536	1.29	7.21	12.34	1	69
	2008	80	10.69	11.362	1.27	8.16	13.22	1	69
	2009	80	11.2	11.571	1.294	8.63	13.77	1	69
	2010	80	12.58	14.243	1.592	9.41	15.74	1	76
	2011	81	14.14	15.773	1.753	10.65	17.62	1	85
	2012	82	15.22	15.954	1.762	11.71	18.72	1	93
	2013	82	14.54	15.237	1.683	11.19	17.88	0	99
	2014	82	15.63	18.411	2.033	11.59	19.68	1	108
	2015	82	15.71	18.79	2.075	11.58	19.84	2	113
	Total	809	12.89	14.755	0.519	11.87	13.9	0	113
	Change	42%							

Another major change found, however, although not statistically significant across ten years, were 40% decreases in weekly computer users and annual computer usage in public libraries from 2014 to 2015. This change is consistent with other state and national trends and can be partially attributed to patrons connecting using their own devices, the saturation of smartphones, and increased connectivity of the general public. Bottom line is that the public does not appear to be using public library computers as much as they used to. The rapid decline in both users and usage occurred in 2012.

Table 28 - Decline in Public Computer Users

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum	
					Lower Bound	Upper Bound			
Public Internet Computer Users - Weekly	2006	80	256.5	489.456	54.723	147.58	365.42	3	3060
	2007	80	314.43	570.843	63.822	187.39	441.46	2	3011
	2008	80	309.06	571.863	63.936	181.8	436.32	3	3260
	2009	80	323.79	601.946	67.3	189.83	457.74	4	3618
	2010	80	326.63	581.776	65.045	197.16	456.09	4	3155
	2011	81	323.31	566.357	62.929	198.08	448.54	2	3250
	2012	82	370.46	707.898	78.174	214.92	526.01	3	4328
	2013	82	347.91	690.498	76.253	196.2	499.63	0	4400
	2014	82	448.37	1264.987	139.694	170.42	726.31	0	10098
	2015	82	271.23	418.65	46.232	179.24	363.22	0	2350
	Total	809	329.46	682.741	24.004	282.34	376.58	0	10098
	Change	5%							
	2006	80	13338	25451.699	2845.586	7674	19002	156	159120



Public Internet Computer Users - Yearly	2007	80	16350.1	29683.854	3318.756	9744.28	22955.92	104	156572
	2008	80	16071.25	29736.866	3324.683	9453.63	22688.87	156	169520
	2009	80	16836.95	31301.207	3499.581	9871.21	23802.69	208	188136
	2010	80	16984.5	30252.371	3382.318	10252.16	23716.84	208	164060
	2011	81	16812.05	29450.58	3272.287	10299.99	23324.11	104	169000
	2012	82	19264.1	36810.697	4065.061	11175.9	27352.29	156	225056
	2013	82	18091.56	35905.89	3965.142	10202.17	25980.95	0	228800
	2014	82	23,315.02	65779.323	7264.111	8861.72	37768.33	0	525096
	2015	82	14,104.05	21769.788	2404.071	9320.7	18887.4	0	122200
	Total	809	17131.98	35502.551	1248.203	14681.87	19582.08	0	525096
Change		5%							

The major finding is a potential disconnect between library resources offered and patron usage – the average number of computers increased by 38% while the number of users declined by 5% over that same time period and by 40% from 2014 to 2015.

### Wired and Wireless Uploading and Downloading

Patrons and staff have significantly increased activity in uploading and downloading content over the Internet. While data collection of these statistics did not begin until 2013, all public library statistics measured in this area increased significantly from 2013 to 2015 – patron uploads (wired and wireless) and downloads (wired and wireless) and staff uploads and downloads (wired and wireless). Of particular note is that wireless sessions increased by 23% with the assumption that the majority of those were patrons connecting using their smartphones or mobile devices (e.g. tablets, laptops, smartwatches, etc.)

Patron uploads using wired or networked computers increased by 62%, which is a statistically significant increase.

Table 29 – Average Patron Uploads (Wired) from 2013 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Patron Upload Wired	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	7.71	3.36	12.05	0	100
	2014	82	20.28	-4.17	44.73	0	1000
	2015	82	20.51	-3.88	44.9	0	1000
	Total	809	4.92	1.41	8.42	0	1000
Change		62%					

Wireless patron uploads (using their own devices) increased by 65%, which also is statistically significant.

Table 30 - Average Patron Uploads (Wireless) from 2013 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Patron Upload Wireless	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	6.88	2.65	11.1	0	100
	2014	82	20.01	-4.44	44.47	0	1000
	2015	82	19.48	-4.91	43.86	0	1000
	Total	809	4.7	1.2	8.2	0	1000
	Change	65%					

Patron downloads increased by 59% and uploads by 55% from 2013 to 2015, both of which were also statistically significant.

Staff wired uploads (13%) and downloads (23%) and wireless uploads (14%) and downloads (16%) were also found to be statistically significant.

Overall, all wireless sessions increased by 23%, which also was found to be a statistically significant increase from 2014 to 2015.

Table 31 - Average Wireless Sessions from 2014 to 2015

		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Wireless Sessions – Annually	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	0	0	0	0	0
	2014	82	2686.07	664.75	4707.4	0	67942
	2015	82	3477.74	1166.31	5789.18	0	61344
	Total	809	624.76	307.41	942.12	0	67942
	Change	23%					

### Interlibrary Loans

Overall interlibrary loan activity increased from 2006 to 2015 but not at statistically significant levels.

ILL within Montana increased by 60% from 2006 to 2015 but decreased slightly in 2011 and 2014.

Table 32 - Average Interlibrary Loans from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Interlibrary Loans - Loans - In State	2006	80	1,083.04	168.13	1997.94	0	29848
	2007	80	1,377.65	198.02	2557.28	0	37109
	2008	80	1,314.46	336.46	2292.46	0	33059
	2009	80	2,059.46	523.33	3595.59	0	48722
	2010	80	2,607.48	704.16	4510.79	0	61498
	2011	81	2,295.80	382.37	4209.24	0	59124
	2012	82	2,298.96	380.26	4217.67	0	56317
	2013	82	2,843.72	685.24	5002.2	-1	66599
	2014	82	2,609.48	490.43	4728.52	0	65927
	2015	82	2,707.04	545.11	4868.96	0	68508
Total	809	2,124.82	1580.42	2669.22	-1	68508	
	Change	60%					

Instate interlibrary loans that represented “borrowing” also increased by 59% from 2006 to 2015 but also was not statistically significant because of a decrease in 2011.

Table 33 - Average ILL Borrows from 2006 to 2015

	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Interlibrary Loans - Borrows - In State	2006	80	1106.01	192.44	2019.59	0	27721
	2007	80	1258.53	134.87	2382.18	0	37038
	2008	80	1568.74	114.55	3022.92	0	43109
	2009	80	2020.66	314.7	3726.62	0	55035
	2010	80	2563.73	484.13	4643.32	0	61814
	2011	81	2225.11	90.48	4359.74	0	67046
	2012	82	2301.01	223.17	4378.85	0	64900
	2013	82	2668	417.6	4918.4	-1	65215
	2014	82	2691.38	430.76	4951.99	0	64701
	2015	82	2723.33	399.79	5046.87	0	68727
Total	809	2117.57	1526.08	2709.06	-1	68727	
	Change	59%					

### Significant Correlations Between Library Inputs and Outputs

All public library reported statistics were examined for statistically significant correlations or relationships. In addition, quality-of-life statistics at the county level served by county libraries were also compared. The results parallel separate findings in North Carolina and Arizona that certain library activities and outputs such as circulation and programs have strong statistically

significant relationships with such quality-of-life facts as median income, percent of population in college, and percent of population with a college degree. All significant correlation tables can be seen in [Appendix B](#).

### Library Per Capita Income

Library Per Capita Income (Service Population) was found to be statistically significantly correlated with a host of library outputs. While the relationship cannot be deemed causal what the correlation means is that there is real positive relationship between per capita library funding – as it increases so does the percent of registered borrowers, circulation per capita, collection per capita, expenditures per capita, and visits per capita. Moderate correlations are considered in the 0.3 to 0.5 range while Strong correlations are considered in the .5 to 1.0 range<sup>5</sup>.

Table 34 - Library Income Per Capita Significantly Correlated to Library Outputs

		Income - Per Capita (Service Population)	Income - Per Capita (Census/Estimated Population)
Circulation - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.523**</b>	<b>.533**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Circulation - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.468**</b>	<b>.808**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.596**</b>	<b>.390**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.507**</b>	<b>.779**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.904**</b>	<b>.582**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.606**</b>	<b>.902**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	<b>Pearson Correlation</b>	<b>.520**</b>	<b>.562**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Service Population)	<b>Pearson Correlation</b>	<b>.511**</b>	<b>.547**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Census/Estimated Population)	<b>Pearson Correlation</b>	<b>.417**</b>	<b>.750**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809

### Service Hours

A strong relationship was also found between state and county library income and total service hours at main branches, weekly hours, and bookmobile hours. This is important because weekly service hours also have strong correlations to a long list of library outputs. As service hours

<sup>5</sup> Interpreting Pearson R Correlations, <https://statistics.laerd.com/stata-tutorials/pearsons-correlation-using-stata.php>

increase so, as expected, does a long list of library outputs including circulation, programs, professional staff with MLS, total staff, and weekly and annual visits.

Table 35 - Service Hours and Statistically Significantly Correlated Library Inputs and Outputs

		<b>Service Hours - Main - Weekly Hours</b>	<b>Service Hours - Branch - Weekly Hours</b>	<b>Service Hours - Bookmobile - Weekly Hours</b>
Automation - Number of Internet Computers	Pearson Correlation	<b>.564**</b>	<b>.624**</b>	<b>.491**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Online Full Text Databases	Pearson Correlation	<b>.388**</b>	<b>.447**</b>	<b>.140**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Weekly	Pearson Correlation	<b>.450**</b>	<b>.544**</b>	<b>.347**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Yearly	Pearson Correlation	<b>.450**</b>	<b>.544**</b>	<b>.347**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Internet Terminals - Public	Pearson Correlation	<b>.530**</b>	<b>.628**</b>	<b>.417**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Internet Terminals - Staff	Pearson Correlation	<b>.598**</b>	<b>.592**</b>	<b>.522**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Wireless Sessions – Annually	Pearson Correlation		<b>.313**</b>	<b>.440**</b>
	Sig. (2-tailed)		.000	.000
	N		809	809
Circulation - Juvenile - Annual	Pearson Correlation	<b>.518**</b>	<b>.523**</b>	<b>.631**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Non-juvenile - Annual	Pearson Correlation	<b>.459**</b>	<b>.547**</b>	<b>.486**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Total	Pearson Correlation	<b>.491**</b>	<b>.556**</b>	<b>.545**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Electronic	Pearson Correlation	<b>.345**</b>	<b>.544**</b>	<b>.712**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	246	246	246
Collection - Print	Pearson Correlation	<b>.588**</b>	<b>.584**</b>	<b>.631**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Print Serials	Pearson Correlation	<b>.596**</b>	<b>.585**</b>	<b>.451**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Audios	Pearson Correlation	<b>.509**</b>	<b>.294**</b>	<b>.732**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	320	320	320
	Pearson Correlation	<b>.523**</b>	<b>.589**</b>	<b>.638**</b>

Audios - Physical Units	Sig. (2-tailed)	.000	.000	.000
	N	489	489	489
Income - County	Pearson Correlation	<b>.441**</b>	<b>.752**</b>	<b>.333**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Per Capita/Per Square Mile	Pearson Correlation	<b>.424**</b>	<b>.467**</b>	<b>.665**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Total	Pearson Correlation	<b>.424**</b>	<b>.547**</b>	<b>.368**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Programs - Program Attendance - Total	Pearson Correlation	<b>.552**</b>	<b>.555**</b>	<b>.467**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total FTE w/MLS	Pearson Correlation	<b>.505**</b>	<b>.539**</b>	<b>.543**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total Paid Staff	Pearson Correlation	<b>.584**</b>	<b>.667**</b>	<b>.522**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	164	164	164
Visits - Weekly	Pearson Correlation	<b>.572**</b>	<b>.638**</b>	<b>.481**</b>
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Visits - Yearly	Pearson Correlation	<b>.572**</b>	<b>.638**</b>	<b>.481**</b>
	Sig. (2-tailed)	.000	.000	.000

### Annual Visits Per Capita

The next significant relationship found is focused on getting people to visit libraries. More specifically, what library inputs lead to increased Annual Per Capita Visits to the library? The significant relationships found were on increasing per capita income, expenditures, and collection and increasing the percent of registered patrons.

Table 36 - Statistically Significant Correlations to Annual Visits Per Capita

		Visits - Annual Per Capita (Service Population)	Visits - Annual Per Capita (Census/Estimated Population)
Collection - Per Capita (Service Population)	Pearson Correlation	<b>.444**</b>	<b>.300**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Census/Estimated Population)	Pearson Correlation	<b>.511**</b>	<b>.670**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	Pearson Correlation	<b>.571**</b>	<b>.458**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	Pearson Correlation	<b>.621**</b>	<b>.836**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Service Population)	Pearson Correlation	<b>.511**</b>	<b>.417**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Census/Estimated Population)	Pearson Correlation	<b>.547**</b>	<b>.750**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	Pearson Correlation	<b>.561**</b>	<b>.542**</b>
	Sig. (2-tailed)	.000	.000
	N	809	809

## Programming

The next set of significant correlations is focused on which library inputs significantly lead to increased patron outputs in terms of programming? Not surprisingly, the larger urban areas with more staff lead to increased programming and program attendance. The more registered borrowers, the more staff, the more programs, and the more program attendance.

Table 37 - Statistically Significant Correlations to Programming

		Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total	Programs - Attendance - Adult	Programs - Attendance - Children	Programs - Attendance - Young Adult	Programs - Attendance - Total	Registered Borrowers
Income - State Per Capita/Per Square Mile	<b>Pearson Correlation</b>	<b>.433**</b>	<b>.604**</b>	<b>.486**</b>	<b>.598**</b>	<b>.525**</b>	<b>.713**</b>	<b>.301**</b>	<b>.670**</b>	<b>.751**</b>
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total FTE w/MLS	<b>Pearson Correlation</b>	<b>.531**</b>	<b>.728**</b>	<b>.525**</b>	<b>.716**</b>	<b>.729**</b>	<b>.888**</b>	<b>.472**</b>	<b>.874**</b>	<b>.860**</b>
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Librarian FTE	<b>Pearson Correlation</b>	<b>.510**</b>	<b>.753**</b>	<b>.524**</b>	<b>.723**</b>	<b>.683**</b>	<b>.865**</b>	<b>.461**</b>	<b>.843**</b>	<b>.842**</b>
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Other Staff	<b>Pearson Correlation</b>	<b>.540**</b>	<b>.719**</b>	<b>.528**</b>	<b>.715**</b>	<b>.700**</b>	<b>.856**</b>	<b>.452**</b>	<b>.842**</b>	<b>.931**</b>
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total Paid Staff	<b>Pearson Correlation</b>	<b>.550**</b>	<b>.760**</b>	<b>.548**</b>	<b>.746**</b>	<b>.722**</b>	<b>.894**</b>	<b>.473**</b>	<b>.876**</b>	<b>.935**</b>
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809

## Significant Correlations with Quality-of-Life Factors

Finally, we examine which library inputs and outputs have statistically significant relationships with quality-of-life factors.

### Programming

The first library input and output is programming. The number of library programs and program attendance are highly correlated to the following quality-of-life factors: total labor force, total unemployed, percent of student population in grades 1-8, percent of population enrolled in college or graduate school, and percent of population with a bachelor’s degree. Total number of adult programs also has a strong positive correlation with median household income.

Table 38 - Programming and Quality-of-Life

		Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total	Programs - Attendance - Adult	Programs - Attendance - Children	Programs - Attendance - Young Adult	Programs - Attendance - Total
EMPLOYMENT STATUS - Population 16 years and over - In labor force	<b>Pearson Correlation</b>	<b>.683**</b>	<b>.591**</b>	<b>.266</b>	<b>.638**</b>	<b>.688**</b>	<b>.744**</b>	<b>.174</b>	<b>.751**</b>
	Sig. (2-tailed)	.000	.002	.199	.001	.000	.000	.406	.000
	N	25	25	25	25	25	25	25	25
EMPLOYMENT STATUS - Population 16 years and over - In labor force - Civilian labor force - Unemployed	<b>Pearson Correlation</b>	<b>.736**</b>	<b>.695**</b>	<b>.254</b>	<b>.728**</b>	<b>.754**</b>	<b>.840**</b>	<b>.173</b>	<b>.841**</b>
	Sig. (2-tailed)	.000	.000	.220	.000	.000	.000	.409	.000
	N	25	25	25	25	25	25	25	25
SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - Elementary school (grades 1-8) -Percent	<b>Pearson Correlation</b>	<b>-.466*</b>	<b>-.491*</b>	<b>-.053</b>	<b>-.490*</b>	<b>-.365</b>	<b>-.387</b>	<b>.190</b>	<b>-.375</b>
	Sig. (2-tailed)	.019	.013	.803	.013	.073	.056	.364	.065
	N	25	25	25	25	25	25	25	25
SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school – Percent	<b>Pearson Correlation</b>	<b>.774**</b>	<b>.584**</b>	<b>.275</b>	<b>.660**</b>	<b>.630**</b>	<b>.647**</b>	<b>.062</b>	<b>.655**</b>
	Sig. (2-tailed)	.000	.002	.184	.000	.001	.000	.768	.000
	N	25	25	25	25	25	25	25	25
EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree –Percent	<b>Pearson Correlation</b>	<b>.671**</b>	<b>.554**</b>	<b>.260</b>	<b>.609**</b>	<b>.662**</b>	<b>.716**</b>	<b>.162</b>	<b>.723**</b>
	Sig. (2-tailed)	.000	.004	.209	.001	.000	.000	.438	.000
	N	25	25	25	25	25	25	25	25
INCOME AND BENEFITS (IN	<b>Pearson Correlation</b>	<b>.535**</b>	.197	.264	.313	.329	.317	.087	.329



2013 INFLATION- ADJUSTED DOLLARS) - Total households - Median household income (dollars)	Sig. (2- tailed)	.006	.346	.202	.128	.108	.123	.680	.108
	N	25	25	25	25	25	25	25	25

### Circulation

In terms of circulation, four library outputs were statistically significant with quality-of-life factors: annual circulation for juveniles and non-juveniles, total circulation, and circulation per capita. Annual circulation for juveniles, non-juveniles, and total circulation had very strong positive correlations with total percent of the population either enrolled in college or with a bachelor’s degree. In addition, circulation per capita had a moderate negative correlation with percent of population over 25 without a high school diploma.

In other words, as circulation goes up the percent of people either in college or with a bachelor’s degree in that community also goes up.

Table 39 - Circulation and Quality-of-Life

		<b>SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma -Percent</b>
<b>Circulation - Juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.784**</b>	<b>.862**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Non-juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.789**</b>	<b>.850**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Total</b>	<b>Pearson Correlation</b>	<b>.790**</b>	<b>.856**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Per Capita (Service Population)</b>	<b>Pearson Correlation</b>			<b>-.415*</b>
	Sig. (2-tailed)			.039
	N			25

### Registered Borrowers (Percent)

The percent of population that are registered patrons also has two moderate correlations – a positive correlation with household median income and a negative correlation with percent of adult population without a high school diploma.

Table 40 - Percent Registered Patrons Correlations

		<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma -Percent</b>	<b>INCOME AND BENEFITS (IN 2013 INFLATION-ADJUSTED DOLLARS) - Total households - Mean household income (dollars)</b>
Registered Borrowers - Percent Registered	<b>Pearson Correlation</b>	<b>-.453*</b>	<b>.405*</b>
	Sig. (2-tailed)	.023	.045
	N	25	25

### Staff with MLS and Weekly Hours

The final two significant correlations found were between total staff with an MLS degree and total weekly service hours at the main branch. The total number of staff with an MLS degree is highly correlated with percent of the population either in college or with a bachelor’s degree. Weekly service hours at the main branch are also moderately correlated with percent of the population either in college or with a bachelor’s degree.

Table 41 - Correlations with Percent Population in College or with Bachelor's Degree

		<b>SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent</b>
Staff - Total FTE w/MLS	<b>Pearson Correlation</b>	<b>.757**</b>	<b>.823**</b>
	Sig. (2-tailed)	.000	.000
	N	25	25
Service Hours - Main - Weekly Hours	<b>Pearson Correlation</b>	<b>.474*</b>	<b>.467*</b>
	Sig. (2-tailed)	.017	.019
	N	25	25

## Primary Challenges Facing Montana Libraries

Thematic analysis using codes to help categorize open-ended responses from the survey found ten primary challenges identified with a top three of funding, staffing, and physical accessibility.

Table 42 - Primary Challenges Facing Montana Libraries

Category	f
1. Funding/Budget: adequate and consistent	38
2. Staffing: Adequate librarians to meet community needs, training, and continuing education	28
3. Physical Accessibility: locations/geography, hours of operation, secure, safe and adequately sized buildings	25
4. Resources: Books, research materials, subscriptions, databases, electronic and digital sources, and MontanaLibrary2Go	16
5. Community buy-in/participation	15
6. Federal, state, local advocacy, partnerships, and collaboration	11
7. Computers, printers, scanners, software, up-to-date applications, i.e. Excel, Word, Adobe: including user instructions	11
8. Marketing/outreach	9
9. Internet/Wi-Fi, E-rate	8
10. Life-long educational and entertainment programming	5

## Primary Opportunities Facing Montana Libraries

There were a top six set of opportunities identified with the top opportunity being to focus on life-long learning programming with an emphasis on literacy, staff, partnerships and advocacy, marketing and outreach, and interlibrary collaborations.

Table 43 - Primary Opportunities for Montana Libraries

Category	f
1. Life-long educational and entertainment programming: including literacy	22
2. Staff: Maintain and fill needed positions, support and leadership, training and education	15
3. Private/Public/Governmental partnerships and advocacy	14
4. Marketing/Outreach	12
5. Interlibrary collaboration	11
6. Funding/budget, grants	10
7. Technology: computers, applications, internet, digital access	8
8. Resources: books, magazines, newspapers, research materials, electronic and digital materials, databases	7
9. Access: adequate geographic locations, safe and sufficient buildings, adequate hours of operation	6
10. Community participation/buy-in	5
11. Community space/events	5

## Tribal Libraries

As Montana’s American Indian racial percentage is six times the national average, a few specific questions about tribal libraries were asked on the librarian survey and one interview was also conducted. Three tribal college librarians answered the survey and overall were somewhat satisfied that their libraries were meeting the needs of their tribal members (Average rated of 5.33 on a scale of 7.0).

In your opinion, are Tribal College Libraries meeting the needs of tribal members?		
Answer Options	Rating Average	Response Count
Tribal College libraries are meeting the needs of tribal members.	5.33	3

Qualitative comments, however, suggested a need for more activities and programming as well as more funding and resources:

- The library doesn't have a lot of activities for the public
- There are always funding issues that prevent us from getting all of what our patrons want or need.
- Money - for purchases, personnel

The interview with a tribal college librarian helped establish the fact that tribal college libraries face a number of unique challenges and are facing major challenges on many different fronts. First, they are very different than traditional academic and community public libraries. As part of a tribal university/college system they receive no public funding like traditional libraries and their budgets represent a small portion of the overall academic institution’s operating budget, which is set by their tribal nation. Because of this, the majority of the budget is spent on personnel often times representing close to 75% of the entire budget, which does not leave a lot for traditional resources and services. The loss of the State Library databases was a huge hit to their services as most tribal libraries cannot afford to pay for these on their own.

For many tribal nations and tribal members there is little to no access to library services. For many tribal members, there is no convenient access to either a public library or tribal college library. In addition, the notion of a library is not a traditional service for tribal nations and therefore it is not a part of the daily life of most tribal members. There is also some racial tension at public libraries which border tribal nation territory because tribal members do not pay taxes yet sometimes use adjoining county public library services.

The interview participant was the director of a tribal college library at a community college. Her library is part of a consortium and they try to provide services for children, early literacy, and youth (free things they get from other places and also from her own pocket). She worked at the college for seven years and finished her bachelor’s and MLIS degrees online. At her library, all funding comes from the college itself and their collection is mainly non-fiction and also obtain and archive things for the tribe. Her college offers 15 or 17 degrees with approximately 500 students a semester. There is no housing and students are very local and commute. Their public

computers are reserved for students and they house the tribal archive (more of a special reading room with targeted material about her tribe). Although they are the official archive of her tribal nation they have no funding or resources in which to do those activities. She also helps proctor for people getting online degrees.

Some other tribal college libraries have more robust archives and every library has to have at least one librarian (in accordance with their accreditation body); most have one full-time along with part-time and volunteers. The Tribe does not put money towards her college – all of the money is through federal appropriations and she is not certain but pretty sure they do not fund libraries directly. There is also a general mistrust of libraries, librarians, and what they do because typically librarians are not tribal members. In fact, she is the first tribal member to be a librarian at her tribal college library and out of seven tribal colleges in Montana only three of them have tribal members; most librarians are non-native and it is a reflection of the profession itself.

The tribal college librarian would like to have stronger partnerships with the public libraries and really would like to secure funding from the tribe to provide services and resources that will directly help them. She would like to be able to show tribal leaders and tribal members what she can do for her community. Although she is unsure about the other six tribes she is confident that most tribal councils do not understand the value of libraries. Younger people from the tribal communities are thinking more about libraries than older generations.

In terms of the needs of her tribal members, in priority order:

- 1) Jobs and careers. Because of some of the federal relationships with tribal members they cannot leverage their land as collateral to start businesses and there is a historic mistrust of tribal members and use of their assets. Because of this they cannot really take out loans and therefore there are very few businesses.
- 2) Healthcare. Native Americans have the highest rate of diabetes of all races. Tribal nations usually do not have independent doctors or clinics and most tribe members rely on the Indian Health System but they are severely understaffed and under-resourced – for example there are only two dentists for 10,000 people so there is very little real preventative care.
- 3) Housing. Two bedrooms for four families for example is a typical arrangement. Tribal members have very few housing options and there is just not enough of it available.
- 4) Violence and drug use. Although this is a problem across the state it is a significant problem for tribal members and tribal nations. Tribal members do have really strong family units and do help one another out but this is still a widespread problem.

In terms of library services and how they can best help her community:

- 1) Help with resumes and completing applications – most of jobs are government or education and there is really very little private enterprise available.
- 2) Keeping the doors open through outreach and marketing – we have expanded hours and often time we are alone in our buildings.
- 3) Assisting with information literacy and providing materials for our students

- 4) We do a lot for students in general (giving them a place where they feel comfortable – some come from 30 miles away)
- 5) We say we have a really high priority for early literacy but do not have many resources or provide much programming to support it, which is mostly due to lack of funds.
- 6) Outreach to the community to give them opportunities to learn and have fun in the library

Another issue she wanted to bring up was better understanding how tribal colleges fit in with the State Library Commission– sometimes she feels like most of what they discuss does not relate to her or tribal college libraries. She also struggles to see how to benefit from LSTA funds and also to encourage tribal colleges to be more active in State Library activities. The State Library does do a very good job of being inventive in serving anybody and one of the trainers even lives on a reservation but there is not a lot of communication or marketing to be active in State Library things. For example, the Federations are not heavily marketed and she does not know of any Tribal College directors who attend the Federation meetings. Although they are a bit out of the way, could her library become part of the courier system?

Tribal college libraries feel isolated and there is not a lot of good will between tribal members and the public libraries – for example at her county seat where there is a lot of housing available there is a lot of racial tension for fear that it is becoming a native town even though tribal reservations and its members do not pay taxes.

How could the State Library best help?

- 1) A consultant to take the lead in helping get the tribal college libraries together with the local public librarians to build partnerships and collaboration in the best interest of tribal members and adjoining county residents as well (e.g. sharing their tribal history and archives for example)
- 2) Prioritize tribal services in public libraries close to the tribal reservations – tribal college libraries really do not have the resources to serve their tribal members in many of the diverse ways public libraries traditionally do. In the ideal, public libraries who are close to tribal lands could receive grant funding to help specifically create services and resources targeting tribal members of all ages.
- 3) Tribal youth typically have nowhere to go or anything to do (like most teens). They need a safe place to congregate and why not libraries?
- 4) Digitization grants. There is a huge need to digitize and archive tribal artifacts as much is being lost, including native languages, as the older generation passes on.

In her opinion, this could start at the Federation level but it would probably help to have one name everyone could turn to build strong partnerships and collaborations and work through some of these very real issues. There is also a need for more training and more professional tribal member librarians. While most non-native librarians are great, usually the tribal people do not see them as part of their community and do not trust them and stay away.

**In what ways do you feel libraries can best support tribal members who use libraries?  
What services or resources are most used or needed?**

Additional survey responses from three tribal college librarians suggest that libraries could best support tribal members through increased activities and programming for kids and families, digital literacy and Internet access, and online training opportunities:

- More activities for kids and families
- There are some members of my tribal community that don't know a lot about using computers or other electronics. We are really patient with these patrons and take the time to show them how to navigate through our services and resources. We have a lot of patrons that use our Ancestry.com and Heritage Quest sites.
- The State Library has been a great support to the tribal college libraries. The addition of webinars has been a great thing. Because we are limited on staff, it is difficult to travel to meetings and training. Online resources are especially important to help us fulfill our professional development goals and networking with other libraries of all types.

**If the State Library were to have available funding in support of Tribal College Libraries over the next five years, where would you most like to see this funding focused on and in what way would you like to see it delivered (e.g. online, training workshops in person, resources for checkout, via cellphone, etc.)?**

If the State Library had additional funds, the tribal college librarians would like to see more in-person training and workshops for both librarians and their patrons. In addition, one participant also noted the need for additional collection development funds:

- workshops in person
- The funds would be used to keep our periodical subscriptions up to date. I would also use the funds to put more current books in the hands of our patrons. I would also use funds to organize trainings in the library for our patrons.
- In-person workshops at our libraries would be nice. By personally visiting our libraries, State Library staff can better understand our circumstances and patrons. Loss of the online databases was somewhat devastating to our patrons and staff. I've received many questions about both the public and academic databases that had been provided. We've received many questions about the loss of the automotive database especially.

## Top Priorities for Libraries

Staff, librarians and trustees, and patrons were asked to identify what they think are the top three ways libraries should serve the community. Given open-ended responses, thematic analysis through coding identified four major top categories – life-long education programming, technology and digital access, books and other information, and access.

**What do you believe are the three most important resources, programs, or services the Library should provide to benefit you and the community?**

Category	Priority 1	Priority 2	Priority 3	Total
1. <b>Life-long entertainment and educational programming:</b> including children and Youth and adult programming and services, especially early child and adult literacy	24	47	50	121
2. <b>Technology and digital access:</b> Internet/Wi-Fi, affordable and accessible, digital/electronic resources and databases	33	37	36	106
3. <b>Books, magazines, and newspapers:</b> including difficult-to-locate and books-on-tape	49	29	15	93
4. <b>Access:</b> hours, geographical location, easy check out, information	25	23	12	60
5. Public Space/community center: welcoming and diverse	4	12	28	44
6. Computers: including printers, operating instructions and safety precautions	12	18	11	41
7. Research/Reference resources	16	12	13	41
8. Collaboration, partnerships, and advocacy: State and national level, Interlibrary card, ILL, shared databases	12	9	12	33
9. Staffing: Adequate staff to meet community needs, continuing education, and training	7	8	4	19
10. Catalog	9	4	3	16

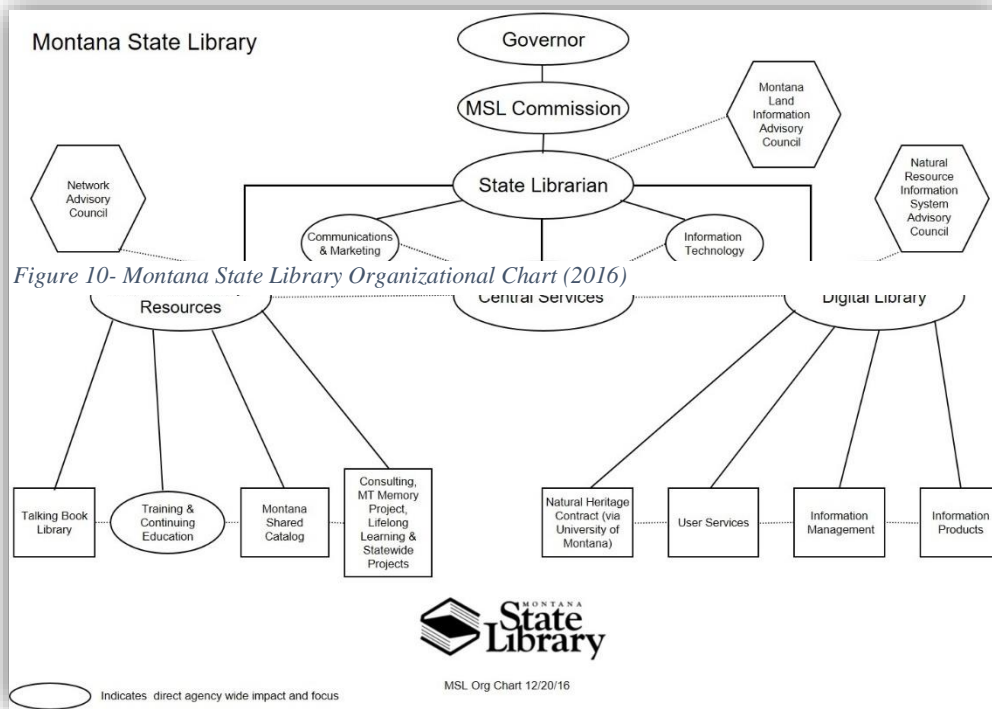
## II. Montana’s LSTA Program

### LSTA Program Organization

In 2016, LSTA funding is overseen through the Statewide Library Resources Division housed within the Montana State Library. Through this division LSTA funds are used to support six main projects and/or activities – The Talking Book Library, Training & Continuing Education, the Montana Shared Catalog, Consulting, Montana Memory Project, and Lifelong Learning & Statewide Projects. The Network Advisory Council (NAC) directly oversees the State Library



Resources Division and the Montana State Library Commission helps oversee the State Library overall.



Changes pertinent to the LSTA program did occur over the past five years within the Statewide Library Resources area. A grants position was eliminated when that

person retired, a full time MMP director and Lifelong Learning position was added. In addition, whereas in the past the NAC used to advise the State Librarian directly, it now works

directly with the SLR Director instead.

LSTA funds in Montana are used to support library development across the state and there is no sub-grant program. The focus is to develop and share statewide resources. An ideal example is the Montana Shared Catalog. LSTA funds allow the State Library to pilot different projects like experimenting with maker kits. It also supports three remote library consultants who are able to focus on individual libraries and their unique needs in real-time. Each consultant supports two federations and each have a specialty area – one focuses on e-rate, another on strategic planning, and the third is familiar with other federal programs. It also funds an IT staff person and trainer, the Talking Book program, and in general it is used to support infrastructure, innovation, and engagement for all libraries around the state. They try to avoid funding individual projects because of their commitment to scalability for all libraries.

### State Library Priorities and Strategic Directions

A 2015 statewide study involving all types of libraries and federations examined how Montana libraries should focus their resources and a strategic vision was created: *Libraries are leaders in creating thriving communities*. Eight focal areas were identified as necessary to achieve this vision – library directors, library boards, library infrastructure, lifelong learning opportunities, public access technology, collaboration, effective governance and funding, and staff<sup>6</sup>. In

<sup>6</sup> Montana Library Priorities.PDF

December 2016, the Montana State Library adopted a new strategic framework<sup>7</sup> stating that its purpose is to help *all organizations, communities, and Montanans thrive through excellent library resources and services* with three primary priorities in which to achieve this vision: 1) Foster Partnerships, 2) Secure Sufficient and Sustainable Funding, and 3) Create a Useful Information Infrastructure.

## LSTA Overview

In terms of LSTA allocations and projects the past five years has seen an emphasis on OBE (outcomes-based evaluation) and developing metrics in which to evaluate and measure the impact of LSTA-funded initiatives. Qualitative evaluation has always been a tradition but there has definitely been a shift towards more quantitative and performance-based evaluation and planning. The NAC could be the right place to help the State Library develop metrics to help create targets and measures of success. There is a strategic need to be more intentional and performance-based from the implementation side as LSTA funds are not increasing and the fading away of coal-severance tax funds due to the fading market.

As far as the LSTA process, they receive the LSTA award in early spring and the State Library gets to work looking at any new program proposals. The NAC reviews proposals and the Commission votes (proposals are new costs and priorities). This process is not highly formal or that closely aligned to the five-year plan. The State Library has been striving to improve this over the last couple of years. The goals from their strategic plan, however, are connected to the LSTA goals and this helps inform how LSTA funds are allocated. In the end, although LSTA funds are only a small portion of State Library funds it has had a major impact across the state and is especially important given how volatile their statewide funding is given major reductions in their coal severance tax revenue.

Focus groups with representatives with libraries across the state revealed high levels of satisfaction and strong spirit of collaboration and sharing. Specific areas mentioned were how useful and valuable the consultants were in always being there for them when they were needed. As one participant noted, “If you have a problem they will come to the library right away; they do a lot for rural communities” (Focus Group Participant, October 2016). Participants were also unanimous in their support of keeping LSTA allocations centralized, which they feel is the right model for their state as opposed to allocating funds through competitive grants. Other strong positives included the transparency and openness in which the State Library engaged with libraries and willingness to support all types of libraries.

Participants who had come from other states who had competitive grant programs also noted several additional advantages to the centralized model – it used to be very difficult and stressful to apply for grants and smaller libraries rarely had the time and resources to prepare and compete for those grants. The bigger and more experienced libraries always applied for and received the grant funding and rural libraries in particular were not competitive because of lack of expertise and resources. Lastly, the centralized model reflects the spirit of support and collaboration of Montana, which helps it remain such a special place to be.

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<sup>7</sup> Montana State Library Strategic Framework, [http://docs.msl.mt.gov/aboutweb/documents/strategic\\_framework.pdf](http://docs.msl.mt.gov/aboutweb/documents/strategic_framework.pdf)

### The Network Advisory Council (NAC)

This committee is comprised of representatives from all different types of libraries and one of their purposes is to have “the uncomfortable conversations.” For the school library representative, her role was to keep informed by being at the table as she does not feel school libraries have a large voice in general. The State Library Staff encourage the NAC to have conversations about libraries and the role of the State Library and LSTA funding. One member noted that an opportunity for improve was in the way they set goals and measured progress, “it is a little stale and we need to stop counting stuff but rather point to user outcomes (let’s get Jane Doe’s stories)” (NAC Focus Group Participant, October 2016). They also noted they need to look at what they are doing in a different ways emphasizing focusing less about how much money was spent and more on stories of impact of that funding. There was a general sense that the reports given to the NAC were not as useful and informative as they could be.

### Satisfaction with LSTA Program, State Library, and Services

Librarians were asked to identify which State Library services they used and OCLC, the Montana Shared Catalog, and downloadable e-content where the three most frequently used services.

Table 44 - State Library Services Used

#### Montana State Library Five-Year LSTA Evaluation Survey

Which of the following have you used or been a participating member of from 2013-2016 (check all that apply)?

Answer Options	Response Percent	Response Count
OCLC Group Services (cataloging and interlibrary loan)	85.2%	98
Montana Shared Catalog	75.7%	87
Downloadable e-content	65.2%	75
Discovery	40.0%	46
CE program	68.7%	79
Consulting	27.8%	32
Courier Service	37.4%	43
Montana Memory Project (MMP)	45.2%	52
Early Literacy	40.0%	46
Montana Talking Book Library (MTBL)	16.5%	19
Other (please specify) and/or please feel to clarify or elaborate:		10
<b>answered question</b>		<b>115</b>

They were also asked to rate their overall satisfaction with these services and the top three were OCLC, the Montana Shared Catalog, and Continuing Education opportunities.

Table 45 - Highest Rated State Library Services

To what extent are you satisfied with the following State Library programs?		
Answer Options	Rating Average	Response Count
1. OCLC Group Services (cataloging and interlibrary loan)	6.31	95
2. Montana Shared Catalog	6.21	96
3. CE program	6.03	93
4. Montana Talking Book Library (MTBL)	5.73	90
5. Early Literacy	5.65	95
6. Montana Memory Project (MMP)	5.53	92
7. Downloadable e-content	5.48	95
8. Consulting	5.33	91
9. Courier Service	5.15	95
10. Discovery	4.20	89
	5.56	

Select comments:

- Ready2Read has been one of the most successful programs in our state, and has directly benefited the families of Montana. It has created high-quality materials and training specifically focused on librarians helping families and caregivers with young children. The online trainings are also very well done, and really help to engage librarians in a state our size.
- state library consultants do not support library staff and give conflicting advice and often inaccurate info
- MTBL is the most successful program of the entire state library. State employees mostly do not know about OCLC and Interlibrary loan. Much work needed to get the word out to our thousands of state employees.
- I would like to see expansion of the courier service to include more libraries and library types.  
  
The MTBL needs to be promoted outside of general library circles - patrons who need this service are often not aware of its existence and don't go to their public library for items. (My experience is that they assume MTLibrary2Go is the only "audio" option available.)
- MSC is heavily weighted to serve the Western side of the state particularly the 'partners, sharing groups' or the "founding members" while giving short shrift the to the eastern side of the state.
- I really like the work being done with the MMP however I think that a better platform than CONTENTdm could really make this program shine
- EBSCO databases- 1
- Discovery and Courier service are vital, but still need lots of work.

- I strongly agree that the State Library has attempted to provide services, training, promotional materials, and consulting in every area possible and has given great thought to areas in which the level of service has had to decrease. As far as the services listed above, I believe the State Library has provided a wonderful variety of services - but my community does not utilize all of the services to the utmost extent. However, I believe it is important for other libraries across the state to have the opportunities to use these services and hope they continue.
- When I refer folks to MTBL they can only use the services if they have doctor's proof.

## LSTA Program Strengths

5) Strengths of the LSTA program were discussed in interviews, focus groups, and a statewide survey. The LSTA programs greatest strengths include statewide services such as MSC, TBL, MMP, consulting, training, excellent staff, with strong centralized projects that continue to improve.

Select comments:

- MSC, consulting, training
- LSTA provides funding for TBL.
- Attention to data, collaborative and collective decision-making. It has provided a clear roadmap to keep things "on the rails" when funding or other pressures have come into play.
- Traveling consulting librarians, an abundance of training opportunities, localized library groups based on geography (federations), excellent human resources hiring decisions and job reconfiguration decisions.
- Excellent staff; strong centralized projects
- The staff far and away are a great strength – so knowledgeable, intimately familiar with the libraries in the state and incredible people to work with.
- Centralized process – do not give subgrants; these programs have been built and have been consistent and continue to improve.
- Responsive to the Montana library community
- Staff is small but can also be a weakness (staff stretched too thin).
- The LSTA coordinator – both former and current (conscientious and strong human side)
- We do follow our five-year LSTA plan.
- Great trust – inside and outside of the library community; impartial, quality organization
- All of our departments are engaged with one another; good communication; good leadership
- Talking Books in particular (although staffing has been a challenge)
- Lots of great ideas; our leadership team is willing to try different things (willing to experiment with things)
- Good ROI
- Let us do a lot of cool stuff – take some chances, the goals of the money – resource sharing and collaboration at its best
- Informal network of communication and formal workshops and meetings
- If there are going to be changes – they put it out there for feedback; they do look at the

data very well to make decisions; they have some kind of evidence to make their decisions.

- Federation meetings twice a year; there is a representative from the Commission comes to our meetings; they do a great job of communication; it is budgetary issue.
- Wiggle room to try new things and that has been huge for me. We have four weekly Storytime's – we coordinate with the schools and preschools; our story times are like preschool; many students see me as their first teacher; the State Library provides resources to make this happen. I use LSTA funding for resources and training to better help support early literacy in the community.
- The SL's support and worth is unmeasurable – professional development and opportunity for collaboration; every person I have worked with has been fantastic

### LSTA Program Weaknesses

The LSTA programs greatest weaknesses include the ongoing challenge in providing electronic resources to all Montanans, a need for closer alignment between inputs, outputs, and MSL's strategic plan and LSTA goals (lack of focus at times), ongoing evaluation informed by clear, measurable goals, increasing cost of the MSC, marketing and outreach about the SL/LSTA activities, and being perpetually at their capacity and always near their breaking point.

Select comments:

- (Providing) electronic resources for all Montanans
- "I'm not sure how much direct communication TBL has with LSTA."
- Focus on inputs and outputs--need to connect to the new MSL strategic plan and look toward measuring impacts.
- Support for specific local library issues, which sometimes end up negatively affecting all libraries, when one library is used to determine state library practices / procedures / laws.
- Evaluation and setting clear, measurable goals (work in progress); lack of diversified funds to support programs in times of crisis means that LSTA is heavily relied upon; concerns about sustainability of having most SLR staff on LSTA funding.
- The new increase (30 cents) for the Montana Shared catalog (where did this cost come from? I do not think this is a sustainable model)
- I would like to see our state's SPR each year (public library director)
- Weakness – we turn over staff and that institutionalized knowledge does not go with it; training has to be the right time and right place (almost onsite training)
- We do not have a robust website – not as nimble as we would like.
- Weaknesses – funding issues; people trying to meet everyone's needs.
- Our library does not really use State Library resources (Montana academic library)
- Advertising what their process and what is out there that academic libraries can use - maybe we can collaborate and build consortia and resources
- I am not sure what the State Library does – how they operate or what there is there
- Very happy with the MMP – not happy with ContentDM; not as accessible as other software; screenreaders, user friendliness

- Lack of focus on metrics; it is very easy to get distracted by the next main initiative
- We need to put more resources into initiatives that have the highest impact – lack of focus
- Flip side of our LSTA process – small shop (10 people in our division and we can only do so much ourselves); if we had additional funds....
- Feels like a top down process sometimes
- Competitive subgrants (were taken off the table – the amount did not seem worth the paperwork)?
- We are perpetually at our capacity – priority to set aside our time to evaluate and review our plan. We have a lot of work that is reactive.
- Formal evaluation process

### LSTA Program Opportunities

The LSTA programs greatest opportunities include increasing partnerships with vendors and suppliers, improved communication as a team and organization, understanding local issues that may have statewide impact at a deeper level, creating a strong evaluation plan to ensure alignment with new strategic plan, taskforce recommendations, and LSTA goals, continuing to improve on existing projects, the success of their new lifelong-learning position, and continued use of data and performance-driven planning and evaluation.

Select comments:

- Investigate more partnerships with other vendors/suppliers around the state
- Improved communication!
- Alignment with the new strategic plan will be critical.
- Become more involved in understanding local library issues that could have state-wide repercussions.
- Creating a strong evaluation plan with the support of our management and commission; thoughtfully advancing our existing statewide programs; lifelong learning position
- Better implementation of existing projects
- Focus on life-long learning; we want to focus more on our aging population (we are going to have to plan and prioritize)
- Coal-tax crisis (loss of 1/3rd of funding)
- The study taskforce’s focal areas represent opportunities to completely realign based on the needs of our libraries
- We have created a life-long learning position which is so broad and encompasses a lot
- Focus on workforce development
- Excited about the shift to data driven performance; staff really wanting to make time to do this.
- Broadband, to bring in these opportunities – the state needs to improve this; can we position ourselves (things like telemedicine)?
- Makerspace movement (fly tying stations) - very connected to our communities
- Partnership between the National Library Service is looking to making things easier;

broadening services

- Library Development Taskforce Survey – we saw the writing on the wall due to increasing funding constraints; identifying these needs gives us clear opportunities and tells us what people want.
- Growing some of our established collaborative programs like the share programs, OverDrive, Montana Memory Project
- Needs to stay streamlined; feds need to know the money is being spent well
- Just need more money
- Data and information needs to come more to us (in easy to understand format) so that we can understand the reports and we can make informed decisions (NAC and State Library Commission)

### LSTA Program Threats

The LSTA programs greatest threats include budget and concerns around it, loss of buying power or sustainability of existing programs and services, being stretched too thin, and tension between big and small libraries.

Specific comments:

- Unpredictable funding and political climate over the next five years; lack of shared vision in our consortia; communicating the value of statewide consortia to our members so that they continue to buy in and sustain or increase our operational capacity.
- Always worried about funding and loss of buying power; real risk so many staff tied to this funding; health-care cost is increasing dramatically
- We do have Library Districts; not like regional; state statute allows for Library Districts (six in Western Montana) – the libraries that have formed them have seen a large growth.
- We have some volatile funding – our natural resources; if we could diversity our funding; if we could have more of our LSTA funding supporting through the legislature.
- Always funding.
- Being stretched too thin
- Tension between big and small libraries (must keep reminding ourselves we must collaborate)

### Progress Towards 2008-2012 Evaluation Recommendations

Results from interviews, focus groups, and surveys suggest that overall stakeholders are satisfied that all five recommendations from the 2008 evaluation have been addressed.

To what extent do you agree that the State Library addressed these previous 2012 evaluation recommendations:		
Answer Options	Rating Average	Response Count
#1. MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the	6.30	11



product and service improving library services. Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.

#2. MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services. The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.

6.40

11

#3. MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries. The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.

6.27

11

#4. The next decade will experience crucial societal demographic changes that will impact both the MSL’s and local libraries’ services to a target patron group. Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals’ life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.

6.08

12

#5. MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago. The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation’s population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.

6.27

11

Specific comments regarding each recommendation:

**Recommendation 1:** *MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services. Data from the product specific surveys demonstrates this in the instance of the Montana*

*Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*

There was a general since that some progress has been made but a lot more work needs to be done in terms of evaluation.

- Strict data and surveys do not always show the entire picture.
- Hearing from the users to whom we provide services is vital.
- Implementation of the Library Development Study Task Force.
- Tied to public library stats; look at that usage; how to grow
- Use data to help think to improve our library services
- Those surveys were focused on statewide projects; they did not have explicit recommendations
- Not consistent and standardized across projects; a plan to bi-annual surveys
- The CE program - a three question survey
- We have a few formal evaluation opportunities
- Not sure we get down to the patron level very often
- No, we do not have something like this specifically.
- Area we want to explore further.
- Not anything specific yet. Library Snap Shot day - but nothing formal.
- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- Adopting process
- Actively striving to do this.
- Not there yet; we are ready now....
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC's input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.
- We do a good job of informing them; making use of the NAC to discuss how
- No, not that formal
- I would like to see the NAC play a more prominent role.
- Been a goal of mine to start having this happen

**Recommendation 2:** *MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services. The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*

- You can have the greatest database on the planet but if no one knows about it and it isn't being used to its potential, how effective it is really?
- Lots of promotional material from databases, early reading, summer programs, and low-vision reading programs.
- Training and professional development - an evaluation guide has been created. The group of trainers meet periodically
- The kinds of evaluation tools we could use.
- We have part-time marketing person; we can do more in terms of outreach certainly
- We would directly with library staff.
- At one point the consultants were called outreach consultants

- Do we have big picture evaluation built in?
- The service requires an annual survey - The National Library Service
- That does happen annually

**Recommendation 3:** *MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries. The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*

- Assuming it will be standardized.
- Even school libraries, which take the most time, have joined despite their disproportionate use of resources. Also the MT shared Catalog hired additional staff to fund this large initiative. I wouldn't have voted for that, but the public libraries did just pass that vote.
- I think it may be time to revisit the idea of a statewide library card, but instead of a single-branded card, instead be constructed of hundreds of different libraries' cards which all grant their users access to the materials and services they need to make their lives, work, and education better. Local brands, responsive to and representative of local needs and resources, with statewide and global power. Local libraries, reaching out, revealing in.
- Continue to grow; some concerns about cost;
- WE have continued to add more libraries; how do we make it sustainable and not to overload our staff?
- Definitely we made progress on this one - all of the libraries came together to help simplify the policies.
- There is so much perception of the value of the MSC.
- I don't think the delineation really happened
- Potentially, consortia are reliant on the dynamics of large libraries and smaller libraries; a deeper study is needed.
- Not in a formal way, there is sensitivity on this issue.
- Perception amongst the rural libraries that their voice is not included but urban libraries are trying to include rural libraries - surveys have shown their patrons want the same thing.
- They don't recognize that everything is scaled differently; informally the shared catalog staff have tried to be sensitive this.

**Recommendation 4:** *The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group. Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- The older demographic won't be around eternally, and the younger demographic who is also disabled is much more tech-savvy. Services should be adjusted accordingly.
- Growing aging population is one we want to focus on.
- No, not really.
- We have tried to stay on top of this - the consultants keep an eye to the future

**Recommendation 5:** *MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago. The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation’s population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

- Adapt with the times, yes.
- Maker Space support
- Online access to trainings; laptop labs, GoTo Meeting pilot;
- Yes, we have put a lot of LSTA funds in statewide platforms; shared catalog.
- Definitely - the maker kits, petting zoos (the consultants)

### III. Retrospective Questions (A-1 to A-3)

#### Addressing IMLS Priorities

The top four IMLS priorities that were the highest rated were #4 (providing training and professional development), #1 (expanding services for learning and access to information), #2 (establishing or enhancing electronic and other linkages and improved coordination among and between libraries), and #8 (Developing library services that provide all users access to information). The four IMLS priorities below the mean rating were less prioritized during the 2013-2016 evaluation period. See the table below.

**To what extent do you feel the State Library has helped Montana libraries with the following services over the past four years (2013-2016)?**

Answer Options	Rating Average	Response Count
#3. Providing training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (e.g. library certification (CE) program)	5.98	118

#1. Expanding services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (e.g. programming training for librarians)	5.53	118
#2. Establishing or enhancing electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (e.g. providing discounted access to digital collections, online resources for patrons, and services for library staff such as OCLC Group Services)	5.49	118
#8. Developing library services that provide all users access to information through local, state, regional, national, and international collaborations and networks.	5.21	107
#6. Targeting library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	4.86	109
#5. Developing public and private partnerships with other agencies and community-based organizations	4.84	114
#7. Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line applicable to a family of the size involved	4.78	106
#4. Enhancing efforts to recruit future professionals to the field of library and information services.	4.40	114
	5.14	

Specific comments for each priority:

### IMLS Priority 1

Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)

Thematic analysis of open-ended survey comments identified five major categories in terms of ways this priority was achieved.

	Category	f
1.	Training and consultation services: technology, services, leadership, conferences, workshops in a variety of locations	17
2.	Difficulty achieving goals: loss of EBSCO databases, HomeworkMT, and Tutor.com have limited achieving goals	15
3.	Interlibrary partnership/collaboration: OCLC, Montana Library2Go, and the Shared Catalog	15
4.	Diverse and locally relevant programming	7
5.	Librarian educational resources	5

## IMLS Priority 2

Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**).

Six main categories were identified in terms of accomplishing IMLS Priority 2.

Category		f
1.	Interlibrary collaboration and partnerships improving resource affordability and access: digital and electronic, Montana Library2Go, Memory project, and Montana Shared Catalog	20
2.	Funding cuts and loss of resources impacting quality and diversity of services offered: EBSCO databases, Tutor.com	14
3.	Staffing and leadership: support, training, and consulting have helped improve accessibility and usability	11
4.	Improving due to budgeting assistance, grants, and associated cost savings	7
5.	Limited due to difficulty in accessing/understanding electronic services: need direct access to Overdrive, Kindle downloads, Montana Library2Go, improved website usability, and clear user friendly instructions	4
6.	School libraries are a low priority	4

## IMLS Priority 3

Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)

Four primary categories were identified.

Category		f
1.	Multiple staff and leadership trainings, professional development and continuing education opportunities	21
2.	Need more trainings, continuing education, courses/workshops: diverse and specific topics held in various geographic locations, improved communication, return of fall workshops, and available to full and part-time staff	14
3.	Online and distance learning	5
4.	Interlibrary collaboration/partnerships: technology, databases, cost savings, and wider staff knowledge base	4

## IMLS Priority 4

Enhance efforts to recruit future professionals to the field of library and information services

This is the one priority that evaluation participants did not feel was heavily addressed but generated a lot of comments during the evaluation. The top two categories were “had not seen activity here” or “do not know.” This was not a priority for LSTA funding during the 2012-2015 evaluation period.

Category		f
1.	Have not seen or aware of such efforts	11
2.	Do not know	7
3.	By providing scholarships and continuing education opportunities: i.e. Sheila Cates scholarships	5

Selected qualitative comments:

- There has been a drop off in this area. Used to managed scholarship program; also part of SWIM
- Supporting paraprofessional and professionals in libraries
- Supporting succession training; more than 50% of librarians are eligible for retirement
- We had some grants before my time – send library staff to library school if they want an MLIS
- We need higher salaries for our librarians; we need to be able to hire staff; the library director that serves over 25k are required to have an MLIS; rural library directors may not have that degree.
- We have had a lot of turnover – it would be great to have more but the salaries are not commiserate with the degree level.
- Don’t see us putting funding in profession training in the next five-year cycle.
- Someone has asked us about this. We have some people who have asked; not at this time
- Took a good amount of staff time to manage this the past.
- Is probably is a need but not sure how much of a need.
- We have all of these retiring librarians; the need for qualified librarians to come in work in Montana is a priority.
- We have done a lot of this in the past; did this for five or six years; big outreach campaign; don’t know how effective it was
- We have been helping with succession planning; prepare mid-level staff; advertising
- Limited resources – focus on library directors; there are other ways but we like this too.
- Worth having a conversation; more important in the rural parts of the state.
- The state library helps train un-trained libraries who become great librarians
- The library association has the funds to help librarians get a degree
- We are really good at training and education; internship programs; ways to recruit;
- Paying higher salaries for professional libraries; paid a livable wage and library salaries are not high enough for professionals to live in areas they want to live.

**IMLS Priority 5**

Develop public and private partnerships with other agencies and community-based organizations **(MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons)**

Four main categories were identified the most mentioned being “have not seen or do not know” but also emphasizing State Library programming like summer reading, TBL, etc.

Category	f
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1.	Do not know/have not seen	10
2.	Increasing public and private partnerships/collaborations would be beneficial: i.e. interlibrary, technology and/or telecommunication businesses, and museums	6
3.	Accomplished summer reading programs, TBL programs	3
4.	Achievement is dependent on fluctuating state library funding, marketing, and outreach: i.e. loss of EBSCO	2

Selected comments:

- Mostly been public; some restrictions because our staff are LSTA funded
- We could focus more or make more of a priority with private partnerships; received grants supporting early literacy program;
- Diversifying funding – I can do more of this.
- Ready2Read is a great example that we do have a lot of private partnerships
- A priority should be placed on doing this for economic and cultural development.

### IMLS Priority 6

Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)

Three categories were identified through thematic analysis.

	Category	f
1.	Unfamiliar and/or unaware of such targeted programs and services	7
2.	Meeting goal by diversifying programming and services: i.e. supporting summer reading programs, talking books, increasing rural access, and cooperation with the Office of Public Instruction on educational programs and MSL.	7
3.	Need more targeted trainings and program development, including marketing and outreach on how to increase diverse patron participation	6

Selected comments:

- Wanted to have more emphasis on different populations; we tried in the past two or three legislative sessions to get funding for the life-long learning position
- Our tribal libraries do want to better serve their members; like to see them continue to be part of the process; some low hanging fruit.
- We struggle a lot with the geography – try our hardest to take down these barriers
- Very important for Billings – Native American; not a large middle-class; have’s or have not’s; a City/County Library (1 main library and one branch at the City College)

### IMLS Priority 7

Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and



Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)

Four main categories were identified Priority 7.

<b>Category</b>		<b>f</b>
1.	unaware of this emphasis and/or efforts	6
2.	Targeted programming is helping in these efforts: Early Literacy trainings, board books, MontanaLibrary2Go, and other programs provided by the State Library	5
3.	Need to improve efforts in this area: staffing, access, marketing and outreach, maintaining EBSCO and expanding broadband	3
4.	Need more consistent interlibrary collaboration and training, including school libraries and State Library.	3

Select comments:

- Texting program; we know that low-income users use text; we are really reaching those with this technology
- Strive to create a cost formula to support less-funded libraries
- We have addressed families and children (expect to expand)
- We probably include our tribal populations in that group. I do see that as a potential opportunity.
- Yes, need to include children from families are in poverty;
- Literacy with families.
- There is a poverty line and people are just above it; they miss out on services; one of my passions in life is our story times for families that cannot get into Head Start – these kids are getting left behind.

### **IMLS Priority 8**

Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks.

Four main categories were identified for Priority 8.

<b>Category</b>		<b>f</b>
1.	Through the development of public and private partnerships and collaborations: i.e. regional, state, and national associations. Montana Shared Catalog	10
2.	Limited due to restricted funding and/or loss of programming and technology limitations	6
3.	Unfamiliar and/or unaware of	3
4.	Need more MSL leadership. Currently, locally focused.	3

Select comments:

- Providing tools to provide access to their local collections
- Significant emphasis with libraries sharing their collections
- Partnership group – have opened-up using sharing walls; people can ask for any collection – they float; courier service
- State publications program; all libraries should be government information centers
- ILL
- State Librarian network; OCLC – group services program
- Service hub – DPLA (Digital Public Library of America) – bring digital collections through Montana into DPLA) – standardizing the metadata.
- Already done, can increase in that area.
- Nixed the databases! Subscriptions through EBSCO are no longer.

**IMLS Priority 9**

Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

The results of this evaluation suggests that the State Library of Montana, despite some challenges in terms of funding and staffing, has done this during the evaluation period.

**Retrospective Question A-1. To what extent did your Five-Year Plan activities make progress towards each goal?** Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?

As one of the core purposes of this evaluation, progress towards Montana’s four LSTA goals were examined from multiple lenses and data points – through interviews, focus groups, surveys, and using a logic model to measure inputs, outputs, and outcomes. For clearer evaluation purposes, each of the four goals were also split into two parts because each identified multiple purposes within the same goal as originally stated. The table below suggests that State Library staff were satisfied that all four goals were accomplished although Goal 2 Part 1 received a slightly lower rating (5.75 out of 7.0) than all other goals.

*Table 46 - Staff Satisfaction Ratings of LSTA Goals*

<b>To what extent do you agree that the State Library has accomplished the following over the past five years:</b>		
<b>Answer Options</b>	<b>Rating Average</b>	<b>Response Count</b>
Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals (part 1).	6.42	12
Goal 1: MSL provides appropriate trainings and training resources so that the best use can be made of the resources offered (part 2).	6.42	12
Goal 2. MSL acquires and manages relevant quality content that meets the needs of Montana library users (part 1).	5.75	12
Goal 2. MSL provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (part 2).	6.08	12

Goal 3. MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons.	6.58	12
Goal 4. MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons (part 1).	6.42	12
Goal 4. MSL provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (part 2).	6.25	12

Closer examination of all LSTA allocations from 2012-2015 suggests that ironically Goal 2 received the highest percentage of funding at 43% while Goal 3, the highest rated among staff, received only 4% of total funding.

Table 47 - LSTA Allocations by Goal (2012-2015)

LSTA Allocations 2012-2015

LSTA Goals	FY2012	%	FY2013	%	FY2014	%	FY2015	%	Total	%
Goal 1	\$313,782.07	31%	\$ 339,356.24	35%	\$ 354,507.33	36%	\$316,942.52	32%	\$1,324,588.16	33%
Goal 2	\$476,794.96	47%	\$ 377,464.87	39%	\$ 416,420.99	42%	\$447,388.31	45%	\$1,718,069.13	43%
Goal 3	\$ 25,157.00	2%	\$ 52,303.02	5%	\$ 20,681.00	2%	\$ 48,568.52	5%	\$ 146,709.54	4%
Goal 4	\$194,500.02	19%	\$ 199,362.00	21%	\$ 199,362.00	20%	\$174,652.10	18%	\$ 767,876.12	19%
TOTAL	\$1,010,234.05		\$ 968,486.13		\$ 990,971.32		\$987,551.45		\$3,957,242.95	

The figure below presents a visual display of the percent of LSTA funds allocated to each goal from 2012-2015.

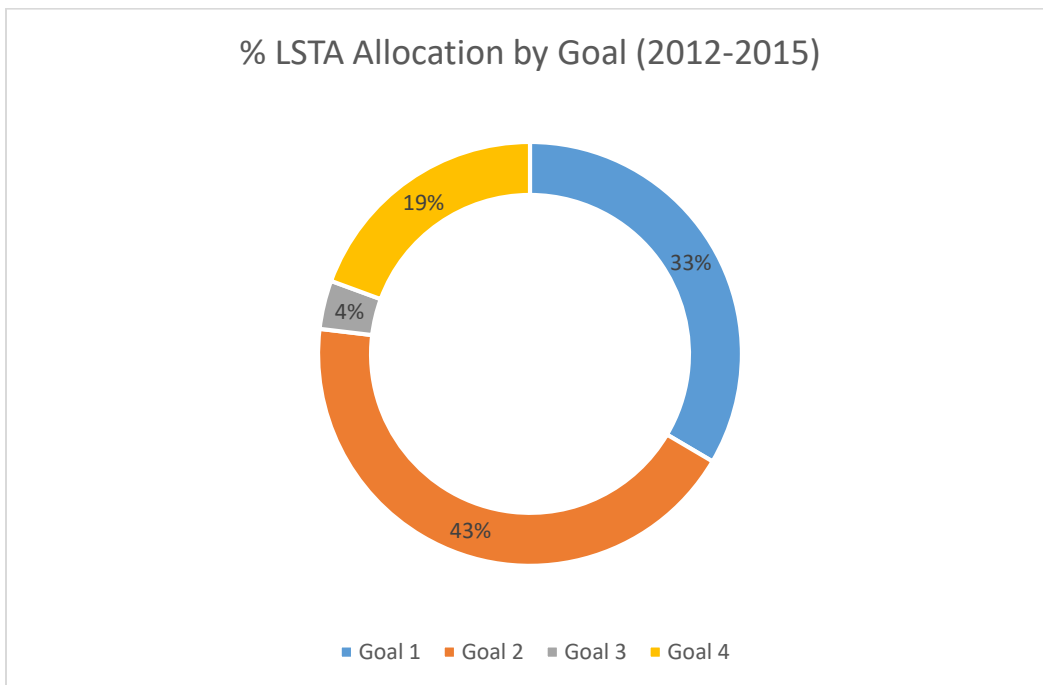


Figure 11 - LSTA Allocations by Goal (2012-2015)



**Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (Achieved).**

Based on triangulated qualitative and quantitative data including a completed logic model (see below) for each Goal 1 objective, it appears that Goal 1 has been achieved. A total of \$1,324,588.16 or 33% of all LSTA funds were allocated to this goal.

The staff rated both parts of Goal 1 a 6.42 out of 7.0. The table below shows the ratings for Goal 1 and Objective 1.

Table 48 - Goal 1 and Objective 1 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals (part 1).	6.42	12
Goal 1: MSL provides appropriate trainings and training resources so that the best use can be made of the resources offered (part 2).	6.42	12
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc.	5.82	11
1.1.1. LSTA will be used for MSL staff to research and stay abreast of library developments (part 1)	5.83	12
1.1.1. LSTA will be used to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision (part 2).	6.08	12

Select staff comments:

- MSL is very proactive in training library staff statewide on new technologies, best practices and resources available to library patrons.
- I believe MSL offers a good amount of consultation and training to end users, but needs to offer more training opportunities for MSL staff to get new information and keep up with library developments outside our state.
- In general, I think the state library does a great job of providing training and services. As far as the small public libraries that are facing specific issues or crisis situations, I don't think that the State Library gets in there, learns about the problems, and advocates. The State Library provides great support, but in a general way.
- Leadership and leading library development is a role that MSL has embraced and focused on through difficult financial times for public libraries and the state.
- I have seen the work that goes into providing training and leadership in these areas. I have also received such training and leadership from employees in the department.

Table 49- Goal 1, Objective 2 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment.	5.50	12
1.2.1. LSTA will be used for MSL staff to assist library leaders with these efforts.	6.09	11

Select staff comments:

- MSL does a variety of things for outreach and to assist community libraries to plan and lead within their communities.
- MSL is doing well on this but needs to promote the idea of being a resource to communities, not just libraries
- Assistance with outreach is always appreciated.
- Again, I agree that the state library does this, but in a general way as opposed to helping libraries with specific problems.
- There is still much to be done to connect public libraries, trustees and local government entities but MSL has made a great start by focusing on this goal and dedicating staff/resources in this area.
- Consultants are paid with LSTA.
- State library staff participates in federation meetings. In an effort to provide greater and more widespread outreach services SLR has taken workshops on the road to visit different parts of the state. SLR and LD offer online training, online resources and self-paced modules to bridge the gaps often caused by distance in Montana.

Table 50 - Goal 1, Objective 1.3 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.3. Provide consultant services for librarians across the state on relevant topics and technology.	6.36	11
1.3.1. LSTA will be used for MSL staff to provide onsite consultation and training	6.17	12

Select staff comments:

- I'm not as aware about "on-site" consultations and training as I am about conferences.
- I tend to think local staff would be better suited for local training, but not in all cases.
- Agreed - on general library law and technology, but not on specific local issues.
- Same as last response -- the consultants are making great progress, but there is still much to be done.
- I've traveled to provide onsite consultations and worked with others who do so. The topics are timely and relevant, the libraries we visit seem happy to have us there and they seem to be hungry for the information we bring.

Table 51 - Goal 1, Objective 1.4 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities.	6.33	12
1.4.1. Provide regular venues for librarians to network, share, discuss, and brainstorm.	6.25	12
1.4.2. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	6.25	12

Select staff comments:

- Familiarity with the LSTA priorities would be a big help.
- Fall workshops, federation meetings, MLA conference are all established face-to-face venues.
- As a public library staff member I have attended many MLA workshops, Offline and The Ready to Read Rendezvous. These sessions have typically left room for brainstorming and discussion. Attendees are encouraged to talk to one another and provide feedback that will help trainers to answer questions and provide help where it is needed. As an attendee, these training opportunities left me with new knowledge and a renewed connection to my greater library community and reinforced my commitment to providing the best possible service to my patrons.

Table 52- Goal 1, Objective 1.5 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others.	6.50	12
1.5.1. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars (part 1).	6.25	12
1.5.1. LSTA will be used to locate and promote other online training for Montana librarians to attend (part 2).	6.42	12
1.5.2. LSTA will also be used for equipment and software for producing and accessing online training.	5.83	12

Select staff comments:

- Maybe I missed them, but I don't know of many webinars that have happened.
- MSL offers webinars, and often promotes training from other sources but has not done much with producing training to share outside MSL.
- Staff development is vital.
- The catalog of webinars and training is substantial. The next level of development needs to pay attention to best practices in online pedagogy and then effectively promoting the content that has been developed.
- Training personnel and projects were a high priority during this period.

- The consultants are committed to their webinars in order to reach people all across the state. I've attended some and revisited many archived webinars. I have also used the online tracker to stay on top of my continuing education credits for Montana certification.

Table 53- Goal 1, Objective 1.6 Satisfaction Ratings

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
1.6. Provide a clearinghouse for information on conventional and online training opportunities.	6.36	11
1.6.1. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.	5.64	12

Select staff comments:

- I know it is available, but find the website fairly cumbersome to get and go through.
- I'm not familiar with any access tools.
- See previous comment. Need to understand more about how users want to access the content and how to make sure they know it exists.
- The Learning Portal was established during this period.
- The learning portal is full of archived training, and the emphasis to add our new training and information to the collection is strong.

*Staff and Librarian Perceptions on Goal 1*

- We have done a very good job – the three regional consultants (they are one of the higher rated resources)
- Learning portal – online access to all training and professional development; been very successful; needs assessment – put on webinars and record them; learning portal – organized by certification requirements;
- We four staff are dedicated to Goal 1 – three consultants, trainer; had much more interaction with the trainer; lot more webinars, CE certification
- Done a lot of strong and robust work here.
- How do we measure success?
- Shift of the consulting away from technology to our current arrangement – libraries felt comfortable doing the technology on their own
- Very successful with our training; CE coordinator brought a strong education background and instructional design
- Excellent job; the consultants really help us; many options for leadership building; they are hitting this quite well; Leadership training every other summer.
- Sometimes we feel we are in the middle of no-where.
- Some of this has been a transition for the Shared Catalog – more training is now available – peer-to-peer training; some definite progress on that front; those things are being standardized around research experience; where we started and where we are now; we are certainly picking up the pace
- Nobody in my organization is able to help me with my job; I do not have library training;



the training provided by the SL has enable me to serve our organization with these skills as a librarian

- Our school librarians are teachers with librarian certification; they must take cataloging; most do not have an MLIS – required to have a teacher’s certification and k-12 library endorsement
- I slipped into my role and the training is essential; we serve agencies; medical library
- This is excellent in each area; I have benefited from each of these; our library hosted the early literacy initiatives; babies and books; attended different programs; resources
- Montana librarians have really worked together.
- Last four years – really seen the SL employees themselves better educated with more expertise
- This is what our SL does best
- Nice to be able to get an answer within 24 hours and know it is correct
- One of the most helpful – the online training is spectacular; helps alleviate the huge land area.

*Goal 1: Logic Model (2012-2015)<sup>8</sup>*

**Inputs:** 3 FTE for statewide consulting - all LSTA funding

**Activities:** Consulting contacts on leadership issues; broadband; technology planning; projects/ideas; trustee orientation (does not include e-rate or MTLIB2GO, etc.)

**Outputs:** Consultants made site visits to all 82 public libraries. Information was provided on a wide range of topics including mobile devices, collection management, OCLC enrollment, services and software, building planning, statistics, human resources, marketing, library policies, social software, MTLibrary2Go, MT Shared Catalog, MT Memory Project, Discover It, EZ Proxy and the MT Library Directory. Other consulting was provided for IT support, filtering, library exhibits, building issues, blogging platforms, school-community library issues, web pages, Internet privacy concerns, RSS feeds, library board and funding body relationships, collection management, e-book creation and self-publishing. Additionally, consultants provided assistance with library districts, administration, disaster planning, technology planning, strategic planning, friends and foundations, CE and professional development, Library Federation plans of service and annual reports, reference resources, technology specifications, board development, intellectual freedom, library standards, and E-rate.

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<sup>8</sup> As reported by the Montana State Library’s LSTA Coordinator/Statewide Projects Librarian

1.1. *Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.*

*Inputs*

**Inputs:** 3 FTE for statewide consulting - all LSTA funding.

**Activities:** Consulting contacts on leadership issues; broadband; technology planning; projects/ideas; trustee orientation (does not include e-rate or MTLIB2GO, etc.). In addition to their regular duties, the 3 consultants helped revise the criteria for receiving the “Excellent Library Standards Award” (ELSA). The ELSA recognizes libraries that use MT’s Public Library Standards to assess and improve their services. Other types of libraries can also earn the award based on applicable standards.

**Outputs:** Number of libraries that received ELSA in this award period: 1,066

**Outcomes:** As a result of the new ELSA standards, libraries were encouraged to strive harder to improve library services. The public library district transition planning template reduced the stress of the transition to a district and helped keep the process on track.

1.2. *Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.*

**Inputs:** Partial time of 1 FTE-statewide consultant

**Activities:** Led strategic planning sessions and planning meetings.

**Outputs:** Conducted a total of 29 meetings from 2012-2015.

**Outcomes:** While there are no specific measures of impact of planning activities, it is well documented that strategic planning is likely to have impacted and helped participating libraries with more efficient and effecting short and long-term planning that will benefit them and the patrons they serve for years to come.

1.3. *Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training*

**Inputs:** Partial time of 3 FTE Statewide Consulting Librarians

**Outputs:**

Activity	2012	2013	2014	2015	Total
Site Visits	412	122	135		669
E-Rate Consultations	220	60	54	51	385
Information requests from public library staff	1712	330	494	282	2818
Consultant led training (in-person and virtual)	189	50	22	52	313
Attendance at training sessions	2274	859	286	416	3835

Consultants made site visits to all 82 public libraries during this reporting period. During the reporting period, information was provided on a wide range of topics including mobile devices, collection management, OCLC enrollment, services and software, building planning, statistics, human resources, marketing, library policies, social software, MTLibrary2Go, MT Shared Catalog, MT Memory Project, Discover It, EZ Proxy and the MT Library Directory. Other consulting was provided for IT support, filtering, library exhibits, building issues, blogging platforms, school-community library issues, web pages, Internet privacy concerns, RSS feeds, library board and funding body relationships, collection management, e-book creation and self-publishing. Additionally, consultants provided assistance with library districts, administration, disaster planning, technology planning, strategic planning, friends and foundations, CE and professional development, Library Federation plans of service and annual reports, reference resources, technology specifications, board development, intellectual freedom, library standards, and E-rate.

**Outcomes:** Library directors gained the knowledge necessary to meet the requirements of the public library standards; State Library consulting contributed to the success of many administrative efforts in small public libraries around the state facing challenging situations. Consultants assisted two libraries in revising interlocal agreements; one library with board reorganization; and one library federation with transitioning to new leadership. Consultants also contributed to the development of a new staffing/compensation plan to assist directors and boards with attracting and retaining excellent employees.

**Output: E-Rate Consultations (N=385)**

Librarians received individual and group E-Rate consultations. The E-Rate consultant attended annual E-Rate trainings in October 2013 in Portland, OR and the 2014 Schools Health & Libraries Broadband Conference in Washington, DC, participated in the American Library Association E-Rate Task Force, and provided data to ALA Office for Information Technology Policy on MT library broadband availability, E-Rate costs, and participation. This consultant prepared comments representing MT libraries for the Federal Communications Commission E-Rate Modernization Order, and attended monthly State E-Rate Coordinator teleconference meetings.

**Outcomes:** Savings of \$390,157.28 from 2012-2015

Activity	2012	2013	2014	2015	Total
E-Rate Savings	\$80,000.00	\$82,800.00	\$92,000.00	\$135,357.28	\$390,157.28

**Output: Information requests from public library staff (N=2,818)**

The three consultants fielded a total of 2,818 information requests from public library staff. While specific outcomes were not documented, MSL prides itself in providing direct support to its librarians in versatile and diverse ways.

**Output: Consultant led training (in-person and virtual) (N=313; Attendees, N=3,835)**

The three Library Consultants planned and carried out training sessions for public library boards and new public library directors to help them become familiar with the laws, standards, and best practices necessary to provide and maintain successful library services.

**Outcomes:** Through formal training and orientation sessions, new library directors and board members became familiar with their responsibilities and with the wide variety of resources available, resulting in improved library services in their communities.

**Output: Technology Petting Zoos (TPZ; \$21,915)**

The consultants provided public library staff training and guidance using the Technology Petting Zoo (TPZ), a set of tablets and ereaders that library staff can use to experience working with new technology. In 2012, 28 tablets were added and in 2013, an additional 10 new iPad tablets and 10 Google Nexus tablets were purchased for new “tablet labs” that add training opportunities in addition to our existing laptop labs.

A total of seven training sessions were held with 110 attendees. In addition, 115 librarians attended a poster session at the 2014 Fall Workshop where they had the opportunity to try out tablets and learn about their applications. 2 new tablet labs purchased with FY13 LSTA support guided exploration and training for library staff on workplace apps and concepts like roving reference and embedded librarianship. Projectors and speakers augment these training labs. As the comfort level has increased and the technology itself rapidly and continually changes, MSL has switched to a maintaining a core set of 5 TPZ kits. Each kit is customized specifically to supply the appropriate equipment to the 3 Statewide Consultants, the MSC Trainer and the Talking Book Library staff so that they can provide effective training and support to the librarians and TBL patrons they serve.

**Outcomes:** Library staff gained experience with current technological devices in order to better serve their patrons and connect them to state-supported online services such as

MontanaLibrary2Go. The TPZ allows for technology and digital literacy to be taught for librarians across the state.

1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.

**Inputs:** 1 FTE - Statewide CE Coordinator who managed all of the following projects.

**Outputs:**

Activity	2012	2013	2014	2015	Total
Fall Training Workshops	53	21		12	86
Workshop Attendees	561	160		140	861
Trustee Training Hours	21	9	12	12	54
Trustee Attendees	335	34	116	64	549

**Output: Fall Training Workshops (N=86 sessions, 861 attendees)**

Respondents consistently ranked Fall Workshops sessions highly. 86 -100% rated the sessions at Fall Workshops as relevant to their jobs, 86-100% rated the session presenters as well prepared, and 78-90% said that the sessions met their expectations. A large majority of attendees reported that the training was interesting (60-78%), related to their job(s) (60-70%), expanded knowledge or skills (62-70%), and was practical (50-77%).

**Output: Trustee Training (N=54 hours, 549 attendees)**

Attendees gave the presenters high grades, and overwhelmingly noted that opportunities for trustees to network are rare and much appreciated. At the 2013 Montana Library Association meeting, the Flathead County Library System was honored as Montana’s first board where all the trustees had attained MSL certification under the state library’s certification program for trustees. This was a significant positive outcome in support of the MSL certification program and a model for other boards.

**Outcomes:** Evaluation at Trustee trainings have uncovered a need for template materials to assist library boards in a director search and hire, for example. Through discussion with the CE cohort supported by the Chief Officers of State Library Agencies (COSLA), it has been determined that this is a common need across states. In response, the CE Coordinator at MSL is working with her peers to develop these materials.

89% of trustee training attendees reported that they learned something that was directly applicable to their library, and 75% noted that they were now aware of specific gaps that

exist at their libraries that need to be addressed. 25% found that the procedures they have in place put them in good shape to manage a transition in executive staff, and a few mentioned that the affirmation of their preparedness was reassuring.

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2 of a series of 3 onsite trustee trainings were augmented by an online version of the training to reach a greater audience and provide a follow-up resource accessible anytime. Ensuring Library Leadership Continuity webinars with Jim Nys were replayed a total of 17 times. Hakala’s 4 part webinar series, Happily Ever After: Board/Directory Relationships that Work generated more than 50 plays.

**Additional 1.4 Activities**

Activity	Frequency	Outcomes
Summer Leadership Institute number of participants:	36	Identified projects included developing resources for succession training, planning a book festival in eastern MT, engaging with community organizations to build resources for homeless library users, initiating a “Books & Babies” program, and planning for a building remodel and expansion. These ongoing projects would be supported through ongoing communication with Institute colleagues and mentors through a forum on the Learning Portal and in-person follow-ups at conferences such as Fall Workshop and the MT Library Association annual conference.
Scholarships for library staff:	20	R-Squared attendees shared their experiences with MT colleagues through a day-long training, inspired by the conference, at the MT Library Association conference in April 2013.
Scholarships for library staff to attend the Association of Rural & Small Libraries annual conference and the American Library Association conference. Number of scholarships offered:	4	The ALA scholarship attendee partnered with Multnomah County (OR) Library staff on a webinar after attending their ALA “My Librarian” session, and shared how he was adapting their ideas at his library. The webinar had 10 live attendees and 44 plays on Vimeo.

<p>The Montana State Library used FY14 LSTA to sponsor scholarships for public librarians and members of the Montana State Library's Network Advisory Committee to attend national conferences. Afterward, the recipients shared conference findings with their peers via recorded webinar sessions facilitated by the State Library. Scholarships for library staff:</p>	<p>9</p>	<p>Scholarship attendees have commented that without the scholarship opportunities provided through the State Library, they would never have been able to attend a national conference. Post-conference sessions also increased knowledge sharing and collegiality within the Montana library community. An hour long webinar session, “Great Ideas from the ARSL Conference,” was presented by 2014 attendees and uploaded to the MSL Vimeo channel (<a href="http://vimeo.com/112195336">http://vimeo.com/112195336</a>). At reporting time, this video had been replayed 22 times. The American Library Association 2015 Annual Conference Montana peer sharing webinar (<a href="https://vimeo.com/139648042">https://vimeo.com/139648042</a>) had been replayed 11 times.</p>
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1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training

**Inputs:** 1 FTE, 82 Citrix GoToMeeting licenses (\$10,750.22)

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Online Training Hours	292		81	59	432
GoToMeeting Licenses		82			82
Certifications	309	80	63	86	538
Number of webinars available on the MSL Vimeo channel		69			69

**Output: Online Training, Webinars, & Vimeo Channel**

The output of more than 80 webinars and tutorials added to the MSL Vimeo channel and linked through the learning portal during the grant period resulted in a measurable increase in application to the MSL certification program. In calendar year 2012, there was a 90 % increase in certifications issued. In calendar year 2012, there were 80 certifications issued by the MSL; the previous 3 years had an average of 46 per year.

**Outcomes:** Evaluative measures for webinars included in-session feedback, statistical analysis from the MSL Vimeo channel, and informal peer review. MSL webinars were well received, archived recordings were popular with library staff, and applications for MSL certification continue to trend up. Librarians can search Vimeo to quickly find content either by MSL CE category classification or by the MSL program that the training is developed to address. MSL’s Learning Portal also links to national providers of online training for libraries. The constant online availability of learning opportunities supports the MSL Continuing Education Certification Program, a requirement for all MT public library directors, and an optional program for other staff and trustees.

Applications for Montana State Library Certification reveal that users depend upon online training to supplement their face-to-face training activities. 62.5%, nearly two thirds, of librarians currently tracking their CE in the Montana Library Directory have listed that they have attended a webinar in the past few years. The mode number of webinars attended is three. Among those that have actually achieved certification, the reliance on webinars for their professional development is significantly higher. Web-based learning supports the State Library Certification program by expanding the learning opportunities for librarians and trustees, and reducing hurdles such as limited travel budgets, extreme weather, and long distances in Montana.

Evaluative measures for webinars include in-session feedback, statistical analysis from the MSL Vimeo channel, and informal peer review. MSL webinars are well received, archived recordings are popular with library staff, and applications for MSL certification continue to trend up. Librarians can search Vimeo to quickly find content either by MSL CE category classification or by the MSL program that the training is developed to address. MSL’s Learning Portal also links to national providers of online training for libraries. The constant online availability of learning opportunities supports the MSL Continuing Education Certification Program, a requirement for all MT public library directors, and an optional program for other staff and trustees.

### **Output: GoToMeeting Licenses to Libraries**

The Online Training and Meeting Software pilot gives public library directors, staff and trustees access to online meeting and training software that enables them to virtually meet, collaborate, and share expertise. MSL was able to expand its existing Citrix contract to include 82 additional licenses, one for each public library. Directors manage their license internally, enabling staff or library trustees to also organize online meetings and trainings if desired. Through GoToMeeting, librarians network with colleagues, increase board meeting participation, and facilitate community discussions that lead to partnership opportunities. Librarians also have access to shared GoToTraining and GoToWebinar licenses. MSL also acquired more licenses for its staff to increase webinars facilitated by MSL in support of LSTA efforts. Number of GoToMeeting licenses provided to public libraries

**Outcomes:** A. Public library directors and staff become comfortable utilizing their individual GoToMeeting licenses to network with colleagues around the state, optimize meeting opportunities related to overall library administration, and advance the public service goals of their library within their individual communities. B. Public library directors and staff utilize the shared GoToTraining and GoToWebinar licenses available from the State Library to share expertise and collaborate on ideas for library development and resource sharing with their colleagues around the state, and to provide direct training



and assistance to their end users. C. The State Library gains an understanding of the ways in which libraries can use online meeting applications to gain efficiencies, expand services and reach new audiences. D. There is a notable expansion of training expertise that gradually develops from within the library community, as librarians begin to utilize these tools to collaborate and assist each other. E. The 6 library federations in the state see benefits, such as an increase in trustee attendance at federation meetings and meetings of multiple federations for purposes of training and collaboration. F. Librarians gain a better understanding of the use of online meeting tools as an option for specifically publicly noticed meetings.

**Output: Increase in MSL Certifications to Librarians**

Library directors in Montana are required to maintain certification through the State Library program in order to receive state aid funding. All other library staff are encouraged to achieve certification. An increase in certification signifies a better educated and skilled library workforce in Montana.

In 2013, Nearly 500 individuals have registered to track their CE with MSL, and an average of 80 librarians and trustees apply for certification or renewal every year.

In 2014, The application procedure for Montana State Library Certification was moved to an exclusively online process for all library staff and trustees in order to improve data collection, reduce errors in processing, ease the process for applicants, and create a procedure that is sustainable as requests for certificates continue to increase while staff-time available for processing is decreasing.

1.6. [Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.](#)

**Inputs:** 7 LSTA-funded MSL staff contributed to the development of the Learning Portal throughout this reporting period: The Training and Development Specialist, the Montana Memory Project Director, a Reader Advisor from Talking Book Library, the Training and Technical Services Specialist for the Montana Shared Catalog, and the 3 library consultants.

**Outputs:** The Learning Portal is a website created and maintained by MSL staff. The purpose of the Learning Portal is to provide a centralized location for online learning resources produced by MSL or as a result of MSL programs, to support continuing education of library staff and trustees statewide, and to enhance use and understanding of MSL statewide projects and programs. The Library Learning Portal contains information about training opportunities, library development materials, and handouts from former workshops sponsored by MSL.

Pages of Learning Portal content developed during this period: 254

**Outcomes:** MSL staff set the following outcomes set for the Learning Portal: 1. Provide anytime, anywhere rigorous and relevant training opportunities to Montana librarians and library trustees to improve information services and library operations statewide. 2. Support the Montana Library Certification program for library staff and trustees by making it easier to find training that qualifies for continuing education credit and applies to one of the four CE categories, so that more librarians and trustees achieve their certification. 3. Nurture a culture of learning among library staff, volunteers and trustees so that they not only seek out more training opportunities, but they share what they know with their peers across the state and beyond.

In 2014, The Continuing Education Coordinator adjusted and expanded the Montana State Library Learning Portal to provide easier access to training materials and better navigation so that all library staff could more quickly and easily find relevant on-demand training. 78.5 percent of respondents enrolled in a six-part series exploring online resources that are licensed statewide for libraries and their patrons noted that they liked that they did not have to travel to get training. 57% indicated that they felt connected to the class. Every respondent cited at least two reasons why they liked the online class.

**Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (Achieved).**

This goal was the lowest rated (5.75 out of 7.0) by staff yet had the highest percent of LSTA funds allocated with \$1,718,069.13 or 43% of all LSTA funding from 2012-2015. Three of the most significant activities implemented was the Montana Shared Catalog, MontanaLibrary2Go which circulated 4,862,102 e-resources to 102,497 patrons from 2012-2015, and the Montana Memory Project (MMP). Staff overall were satisfied with both parts of Goal 2 (5.75 and 6.08, respectively).

Table 54 - Goal 2, Objective 1 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
Goal 2. MSL acquires and manages relevant quality content that meets the needs of Montana library users (part 1).	5.75	12
Goal 2. MSL provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (part 2).	6.08	12

2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually.	5.83	12
2.1.1. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources.	5.92	12
2.1.2. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	5.83	12

Selected staff comments:

- Unfortunately, some of the e-content has been cut, but on the other hand some of it was not used enough to cover the cost.
- MSL needs to do better on these.
- It's difficult to measure user need without feedback. Sharing that feedback is also important. There are many quality resources here but the outreach doesn't seem to meet the same level of quality. Funding also seems to be a constant issue.
- MSL and libraries have learned so much over the past five years about content, content delivery, and online resources. These lessons have been invaluable as we move into strategic planning and resource allocation in the future.
- Insufficient personnel time to fully develop this goal.
- Over the last five years the Montana State Library has done all of these things. It might be easy to think otherwise with the recent discontinued funding that has resulted in a search of new options and solutions for some of these services. Overdrive still seems to remain popular and well used. As a library patron I have to place holds on new and popular items in Overdrive because there are so many people using it.

Goal 2, Objective 2, Activity 2 was not rated as highly as the goals, objectives, and activities in Goal 2.

Table 55 - Goal 2, Objective 2 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources.	6.55	12
2.2.1. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization.	6.36	12
2.2.2. LSTA will also provide high-quality digitization equipment for libraries to use.	5.18	12

Specific staff comments:

- I don't know of any equipment supplied, but it might have happened. I do know that Jennifer Birnel has done a wonderful job and the MMP has grown and is vastly better than it was 4 years ago. What a great resource for people.

- Additional staff for the MMP would help meet these goals. Also an investing in a mobile "digitization lab" a trainer could take to a library and assist them with digitizing a collection would also help increase collections.
- The MMP is one of the most valuable assets that MSL will continue to develop with its partners.
- MMP switched to centralized digitization rather than providing equipment, but otherwise, met these goals.

Overall, Goal 2, Objective 3 and its activities were not as highly rated.

Table 56- Goal 2, Objective 3 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons.	5.27	11
2.3.1 LSTA will be used for MSL staff to research and evaluate existing and beta products (part 1).	5.20	10
2.3.1 LSTA will be used to negotiate statewide discounts (part 2).	5.60	11
2.3.1 LSTA will be used to train librarians and patrons in use of existing and new products (part 3).	5.58	12
2.3.1 LSTA will be used to develop materials to promote use of the tools across the state (part 4).	5.58	12
2.3.2. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.	5.75	12

Selected staff comments:

- Expand? I don't know if it has "expanded" as funding has decreased or shifted to other areas.
- I think it would be important to measure how widely used the tools and databases are before expanding. If such tools are deemed appropriate, expansion would of course become a priority, and then funding becomes an issue.
- This priority has changed as other funding sources have been significantly reduced.
- Statewide Projects Librarian is paid through state funds, not LSTA, so "LSTA will be used to negotiate statewide discounts" needs to be reworded. If we mean, "LSTA will be used to subsidize statewide discounts," that would be more accurate.

Table 57-Goal 2, Objective 4 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web.	6.67	12

2.4.1. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	6.67	12
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Select staff comments:

- I know some libraries across the state who use the shared catalog daily.
- This would seem to depend on statewide broadband access and the viability of the resources depending on user wants and needs.
- A new library just joined the MSC last month and there are others working steadily toward meeting the basic requirements to get started.

Table 58 - Goal 2, Objective 5 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.5. Explore opportunities to improve Internet access and technology support for libraries.	5.92	12
2.5.1. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources.	5.91	12
2.5.2. LSTA could also be used to assist libraries with enhanced access when appropriate.	5.89	11

Selected staff comments:

- There are still areas in MT that need vastly improved internet access. Large metropolitan areas take this access for granted.
- There needs to be more investigation in to possible partnerships with internet providers, especially for rural libraries.
- I can't imagine Montana library users not going for this.
- MSL and the State Librarian are leaders in this area.
- Not clear on how this goal was implemented. We do have a consultant who assists libraries with E-Rate.

Table 59 - Goal 2, Objective 6 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items.	6.42	12
2.6.1. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries.	6.08	12

2.6.2. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	6.36	12
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Select staff comments:

- I don't know of "pilot projects", but I do know of libraries taking advantage of materials loaned from other libraries and resource sharing.
- The courier project is excellent but still needs to expand - perhaps investigating other possibilities that travel to more remote areas (food service trucks?)
- Information access for all is a vital part of library services.
- The courier pilots have been great learning experiences.
- Courier project
- There has been work and research done to try and expand the range of courier services between libraries. As new libraries join the Montana Shared Catalog some are adding their collections to partner libraries.

### *Staff and Librarian Perceptions*

- One of the things we did try that did not work – we tried to launch EBSCO’s discovery tool; the libraries did not buy into this; insufficient user experience; tried it for three or four years but decided to discontinue
- Suite of statewide periodical databases – due to lack of funding we closed it
- Worked with OPI – created online portal that provides access
- Seen significant growth in our MMP – 3 to 4 years, we hired a full-time director – responsible for everything; seen significant growth in libraries contributing to it.
- Kind of a mix. Some ambivalence what represents content – statewide EBSCO contract to provide quality content to the entire state – used highly by school and academic libraries; centralized discovery services contract which allowed each library location as a one-stop location – did not resonate with the libraries
- Academics liked it but did not have much need for the EBSCO service – intent did not align with the Need
- One success has been OverDrive – strong base of libraries that contribute to it.
- EBSCO had a lot of options – they don’t have time to go into that detail and customization; MontanaLibrary2Go – centralized resource and all of the content is shared and very simple in that way; need to rethink how important it is for individual customization.
- MontanaLibrary2Go very successful
- Shared Catalog too
- Databases – lots of outreach, training, and marketing; did not see the usage (EBSCO and GALE)
- The courier has been fairly successful; struggling with the sheer geography
- Some of our content has dropped because of Coal funds have gone.
- The shared catalog; Montana Library2Go (we can’t afford it); before the shared catalog we had a consortium; each library has to now pay their own contract – around \$800.
- Sustainability and cost effectiveness (91,000 circulations in Montana Library2Go); this is really great service but at 30 cents it is almost a disincentive for increased circulation.

- MLTG is being used by patrons but they do get frustrated because of the titles. We do a lot of interlibrary loans.
- From a School perspective this has been huge – online catalogs and e-resources; by being connected the process is more seamless; people get materials from across the state
- We would not be able to run successfully like we do – one of the services used most in our County; we would not be able to run this way without the shared catalog and SL support
- The couriers (200 a month and we are sending 100's of books; regular postage would be \$1,000's)
- Legislators they get this – this is an important service; they have been very supportive.
- The fact they can access the catalog 24/7 – moms can't even begin searching for information without this.
- We are not part of the MTLG – our catalog is 1/3<sup>rd</sup> digital because of this; literally a 3<sup>rd</sup> of our checkouts is digital; a lot of folks can gain access; we see people that we never would come without this semester
- From the School perspective – largely adult and young adult; for many schools this does not meet our needs; a number of k-12 libraries that have purchased them on OverDrive content – did not want to wait too long
- Such great content; hard for the leaders to know what things to put the money toward; school/community library; students don't use it to the extent they should have; homeworker helper program
- EBSCO – both these programs were not utilized as much as they should be; they both went away.
- Montana Shared Catalog (no way our rural community could have a robust system like this); Montana Library2Go (we greatly benefit from this as well)
- They have done their best; always a changing goal; good at always looking at what we need and trying to provide it.
- The Network Advisory Council meet to evaluate what the options and where the SL should put the money; they have a limited amount of money and must prioritize; gives us ownership
- The consultants that go out to the libraries; allows us to customize and form their educational opportunities.
- Eastern Montana – it is incredible; surprised how MLTG has grown and expanded; we never anticipated it would have grown as fast as it has; we have heard that ranchers use it all the time in the field; have access to larger collections; really cuts down on the cost for everyone.
- A lot of little libraries before the shared catalog; now they are part of a high quality system; they finally realized that they can manage this at their libraries
- The Shared Catalog is fairly unique; it is helpful and wonderful model; the MLTG is also incredible – what we are struggling with is it is a victim of its own success; hold times are getting longer and larger libraries are paying more costs rapidly; keeping with the sharing ethos – our per use fee is still less than smaller libraries because we are checking-out more; large libraries face the same budgetary issues – our budgets are getting cut and costs keep going up.
- We have over 100k (.30 cents per item) – costs us \$14k and this will need to come from

the book budget as increased use in the electronic resources; if SL stops paying the platform fee.... Can we find a vendor that does not charge a platform fee? Are there other options other than OverDrive.

*Goal 2: Logic Model*

Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually.

*LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.*

**Inputs:** The Statewide Projects Librarian administered this project (0.25 FTE funded by LSTA in this period).

MSL staff worked with OverDrive to add new libraries, led online trainings for participating libraries on accessing circulation and collection statistics, promotional materials, and support documentation, created step-by-step tutorials on the MSL Learning Portal, created a page documenting membership meetings and committee work on the Statewide Library Resources Portal, facilitated meetings for the membership, Executive Committee, and Selection Committee, worked with the Selection Committee in facilitating the purchase of new content, and provided basic technical support and troubleshooting to participating library staff.

In 2012, MSL began covering the \$1,500 one-time-only startup vendor fee for new libraries joining MontanaLibrary2Go. Use of LSTA funds for eliminating startup fees and hosting a central platform for shared content allowed all sizes of public libraries in the state to participate in ebook and downloadable audiobook lending and offer a vast collection of content to their patrons at minimal cost. The new membership cost share formula includes three different subtiers within what was previously the lowest tier, to create a more equitable cost structure per patron for the smallest libraries. The new lowest tier for new participating libraries (0-999 patrons) paid an annual fee of \$482 for access to over 22,000 items by the end of FY13, averaging out to under \$.02 per item.

**Outputs:** A total of 92 libraries and branches now participate in MontanaLibrary2Go.

Table 60 - MontanaLibrary2Go Circulation from 2012-2015

Activity/Output	2012	2013	2014	2015	Total
MontanaLibrary2Go Circulation (e-resources)	2,641,906	607,637	749,996	862,563	4,862,102
MontanaLibrary2Go New Patrons	60,064	16,921	12,305	13,207	102,497



New items added to MontanaLibrary2Go	26,675	4,458	8,154	7,510	46,797
Total items available in MontanaLibrary2Go	20,314	22,539	30,693		

The consultants provided public library staff training and guidance using the Technology Petting Zoo (TPZ), a set of tablets and e-readers that library staff can use to experience working with new technology. A total of 11 training sessions took place from 2012-2015 and approximately 140 attendees.

**Outcomes:** Attendees gained the skills they needed to serve their local library patrons using MontanaLibrary2Go.

In 2012, the value and popularity of this service has inspired many donations from member libraries, Friends groups, and library federations toward the shared content budget in the amount of \$40,396. This amount was collected from 6 public libraries and 4 federations representing all sizes and budgets. The number of checkouts during this period increased by 32%. In 2013, Circulation (number of checkouts) increased by 23%.

In 2015, during the reporting period, while annual fees for member libraries increased by 5%, the number of e-books and digital audiobooks available to all MontanaLibrary2Go registered users increased by 8% from 28,410 in the FY14 LSTA reporting period to 30,748 total copies in the FY15 LSTA reporting period. This illustrates that, in addition to having access to an existing collection valued at over one million dollars, members saw a collective value increase in this reporting period alone that exceeded the value of their individual contributions. The number of Montanans making use of MontanaLibrary2Go increased during this reporting period, as did their level of activity. Circulation (number of checkouts) increased by 15%, from 749,996 in the FY14 LSTA reporting period to 862,563 in the FY15 LSTA reporting period. During the reporting period, 13,207 new accounts were created for MontanaLibrary2Go. The total number of library patrons registered for MontanaLibrary2Go user accounts increased by 17%, from 63,365 in the FY14 LSTA reporting period to 73,889 in the FY15 LSTA reporting period.

In 2013, 51,057 total registered MTLibrary2Go patrons. In 2014, there were 63,365 total registered MontanaLibrary2Go patrons.

In 2012, a total of 20,314 items were available in MontanaLibrary2Go at the end of this reporting period, resulting in a greater selection for patrons and a greater return on investment for participating libraries. In 2013, a total of 22,539 copies of e-book and audiobook titles were available in the shared collection at the end of this reporting period. “When I pay our MontanaLibrary2Go bill, I know I am buying WAY MORE than just access to the materials. We are also getting top-notch professionals to do the selection

and acquisition of those materials. And I am so grateful that you do this for all of us. Thank you selection committee!” (Dillon Public Library staff).

**Output: MontanaLibrary2Go Local**

MontanaLibrary2Go Local was a pilot developed to expand and diversify the downloadable ebook collection available to the MontanaLibrary2Go consortium, to facilitate ebook content creation in libraries, and to provide a platform for locally hosting content that the consortium could acquire or purchase outright, rather than license through a vendor. This funding covered the licensing and set up of an Adobe Content Server for one year.

The MontanaLibrary2Go Selection Committee decided that the scope of the MontanaLibrary2Go Local e-content pilot collection should be limited to titles of state or regional interest. The MontanaLibrary2Go selection procedure was revised to include local author donations, which are sent on a monthly basis to that month’s selector who evaluates whether the title is appropriate for the collection. The selection team will then review before the title is added to the collection. MSL staff worked on the website infrastructure, patron authentication, and the Adobe Content Server (ACS) upgrade during this time.

**Outcome:** A survey distributed to MontanaLibrary2Go participating libraries in May 2013 indicated that library staff wanted to make additional content, particularly content with a regional emphasis, available to their patrons. This content would include locally created or published e-books, as well as titles from small- to mid-level publishers and academic presses. The setup of the Adobe Content Server was the first step toward being able to host this local content. The Selection Committee’s new procedures for reviewing local content helps guide acquisition choices in this new area of electronic resources collection development.

2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources.

*LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.*

**Inputs:** 1 FTE (Montana Memory Project Director); in-kind match = 100 hours contributing library staff time. LSTA funded the salary, technology infrastructure, and travel for the MMP Director position.

**Montana Memory Project**

Activity/Output	2012	2013	2014	2015	Total
Montana Memory Project (MMP) Training Presentations	165	46	56	53	320

Attendees	1670	412	840	318	3,240
MMP Outreach Visits		38	26	22	86
Digital Collections Improved	1	78			
New Collections Added	9	9	25	4	47
Number of collections hosted on MMP website	178	78	103	48	407
Contributing Institutions	161	38	45	48	292
Number of images hosted on site	2,069,128	254,762	860,164	707,964	3,892,018
Number of images added		254,762	104,402		359,164
Website Visits		124,769	174,430		299,199

**Outputs:** LSTA funded the salary, technology infrastructure, and travel for the MMP Director position. In 2013, a temporary technical assistant was hired on contract to provide support to contributing institutions on the use of MMP related programs, including CONTENTdm’s Project Client; provide training and advice on adding images, objects, and metadata to collections and on creating Dublin Core metadata records for digital items; update the MMP webpage to create new collections, new contributing institutions, lesson plans and other relevant content; post regularly to the MMP Social media sites; and complete other technical and training support duties as directed by the MMP Director.

**Output: Training Presentations**

MMP staff presented workshops and webinars introducing librarians to the tools and techniques for creating digital collections and provided project support and consultation for collections. Presentations or training sessions were offered in Great Falls, Augusta, Helena, Chico, Butte, Dillon, Billings, Forsyth, Choteau and Polson. Trainings and presentations were from 1 - 3 hours in length and attendees came from all parts of the state. Topics covered included introducing the MMP, CONTENTdm software, a joint presentation with the MT Women in Agriculture Oral Histories project, historical photographs from the Dillon and Butte areas, historical college or high school yearbooks from Helena, Billings and Sidney, and local newspapers from Malta and Sidney.

**Outcomes:** Attendees gained the skills they needed to contribute new collections to the MMP.

**Output: MMP Outreach Visits**

As a result of meetings between the MMP Director and potential institutional partners, 13 new collections have been added or are currently being worked on by new partners. Seven of the new collections came from first-time contributors, all of whom were contacted through outreach efforts.

**Output: Digital Collections**

FY12 LSTA funds were used for 9 awards totaling \$7,139.62 to assist 5 libraries, 2 museums and 1 archive in digitizing unique collections for inclusion in the MMP: Beaverhead County

Museum, the Butte Silver Bow Public Archives, Carroll College Library, Phillips County Library and the Phillips County Museum, Rocky Mountain College Library, Sidney-Richland County Library, and MSU Billings Library. Additionally, \$2,091 was used to employ an intern to clean up metadata for the University of Montana - Mansfield Library collection.

In 2013, this funding paid for the costs of digitizing the materials by a central vendor. The funding recipients included 4 public libraries, 1 museum, 1 school & 1 academic library, 1 state agency library, and 1 city agency.

**Outcome:** These new collections add greater geographic representation and increase the number of items that the public can access to learn about Montana history through the MMP website.

**Output: Adding New Collections**

In 2012, \$2,091 was used to employ an intern to clean up metadata for the University of Montana - Mansfield Library collection.

Metadata standardization allows for an easier search and discovery of items on the MMP website and allows for consistent transfer to other content management platforms. In 2013, the cataloguing committee created new guidelines and reviewed metadata requirements in fall 2013. The new basic metadata requirements were applied to the existing collections and collection search results have vastly improved. In 2014 and 2015, this funding was used during this period to pay for the CONTENTdm annual subscription and the statewide Digital Archive subscription which provides long term preservation of master images.

**Outcome:** Subsidizing the cost of the content management software and digital archive software and maintaining the website allowed libraries to create and share digital content online that they may otherwise not have the financial resources or staff time and expertise to share. The statewide platform also allowed that local content to be exposed to a wider audience that it would have otherwise.

**Output: Increased Collaboration and Usage**

Contributing libraries, images provided, and website visits increased substantially from 2012-2015.

At the end of 2015, the number of followers for the MMP's Facebook page had increased by 49%, from 2,578 to 3,852 followers. On Twitter, the MMP now has 184 followers. This has resulted in increased awareness and use of the MMP website. The number of MMP web sessions increased during this reporting period by 8.98%, to 174,430 sessions, and the number of users increased by 12.86%, to 118,050 unique users.

The MMP Director established a formal partnership with the Mountain West Digital Library (MWDL). The MMP content is harvested by their aggregation services and MMP content is searchable on their website. The MWDL is a Service Hub of the Digital Public Library of America (DPLA) and our MMP content is also now available on this national website.

2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.

**Inputs:** \$32,000 in FY12 LSTA provided one year of access to a unique, customizable instance of EBSCO Discovery Service for all Montana libraries; 0.25 FTE (Statewide Projects Librarian, paid with state funds)

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
EBSCO Discovery Service for all Montana libraries	800	800	800	800	3,200
Training Sessions	40	13			53
Training Attendees	329	117			446
Search Statistics	202,147	69,069	76,508		347,724

This contract provided access to a customizable discovery tool at no cost to libraries. It enabled libraries to test the discovery tool and to create a one-stop search tailored to the needs of their research communities.

**Outcome:** In 2013, Discover It use in libraries increased by 22%. In 2014, EDS usage increased by 9.7%.

2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.

**Inputs:** 4 FTE (2.34 paid with LSTA and 1.66 from member fees).

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
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Montana Shared Catalog Allocations	\$181,310.00	\$172,150	\$176,254	\$184,912.62	\$714,626.62
Help Requests	33,780	17,000	1,890	1,890	54,560
Training Sessions Offered	130	44	15	34	223
Attendees	1427	423	182	442	2,474
Number of Libraries Added to MSC	38	3	2	7	50
Startup and data migration fees	\$54,850.16	\$16,344	\$1,900	\$39,667.00	\$112,761.16

MSC staff is responsible for web development, installing and maintaining hardware, installing and updating software, administrative support, database management, new library implementation, providing technical support and training for new libraries, and training member library staff to use MSC tools.

MSC staff facilitated the growth and development of the statewide catalog, evaluated and implemented new products and updates, negotiated licenses and fees, and provided technical support to MSC members.

Participating libraries saved staff time on systems work that the MSC staff covers on their behalf. Participating library staff gained knowledge about using the ILS software and about copy cataloging.

Each year, libraries across the state were invited to apply to join the MSC. LSTA funds are available to help libraries with start-up costs. Joining the MSC led to increased access to library materials for patrons of new MSC libraries.

2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. *LSTA could also be used to assist libraries with enhanced access when appropriate.*

See objectives 2.1-2.4.

2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. *LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.*

**Inputs:** 0.25 FTE (Statewide Projects Librarian, paid with state funds); state match = \$98,886; non-state match = \$369,730; in-kind match = 45 hours’ member library staff time

Enrolled libraries have access to discovery, cataloging, and interlibrary loan tools, with costs based on a formula that keeps OCLC affordable for all libraries. The Group Services contract includes access to CatExpress, Connexion, FirstSearch, WorldCat, and WorldShare Interlibrary Loan. The Statewide Projects Librarian administered the OCLC Group Services project.

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Offset costs to participating libraries for access to OCLC cataloging, interlibrary loan, and authentication tools	\$59,736.00	\$62,277	\$89,741	\$75,380.00	\$287,134.00
Number of libraries enrolled to receive discounted access to OCLC Group Services	1045	251	272	273	1,841
Number of original catalog records added to WorldCat	8,336	3,140	2,933	2,000	16,409
Number of copy catalog records updated in WorldCat	466,590	78,980	89,023	209,155	843,748
Number of ILL requests filled (borrowing)	53,071	49,758	46,859	44,099	193,787
Number of ILL requests filled (lending)	194,449	50,420	50,201	50,000	345,070
Courier Project	\$16,334.00				\$ 16,334.00
startup costs for joining the courier service	\$10,372.68		\$7,839	\$5,765.50	\$ 23,977.18
Number of libraries that received this discount	43		19	18	80
Number of items circulating via courier per month	17,060		685	16,265	

**Output: OCLC**

Interlibrary loan transactions through OCLC decreased by 3% from the FY14 LSTA reporting period to the current reporting period. However, ILL requests made by patrons in MSC libraries that share user privileges continued to increase, probably because of the simpler "place hold" capability within the Shared Catalog.

In this five-year period, MSC library patrons increased their holds on library materials from other MSC libraries by 7.37% (from 271,627 in 2012 to 291,662 in 2016). The consortium also increased the number of libraries sharing items with one another via direct patron holds by 30% (from 61 libraries to 79 libraries).

**Outcome:** This suggests that the MSC is meeting its goal of increasing access to materials for a growing portion of Montana citizens through their local libraries. The Montana Shared Catalog consortium’s project to streamline its configuration and circulation policies during this reporting period has resulted in the MSC staff being able to work more efficiently to meet the needs of MSC member libraries, as well as to prepare for any future system migration and to position the consortium to utilize new

technologies by reducing the complexity of the shared system. During this three-year system reorganization project, staff identified and removed nearly 1,000 unused policies and unused reports from the system.

As a result of this system reorganization, various processes done by MSC staff are now much faster: • Time to add a new library from 120 to 50 hours (58% decrease) • Adding a new branch from 20 to 8 hours (60% decrease) • Adding a library to a sharing group from 20 to 6 hours (70% decrease) • Changing a library to eliminate fines from 5 to 0.5 hours (90% decrease) • Changing circulation rules from 2 to 0.5 hours (75% decrease) MSC staff can now utilize the time saved in these tasks to respond more quickly to ongoing support requests, to develop more training materials to help members use the system effectively, and to research possibilities for further increasing the usefulness and efficiency of the shared system.

The OCLC cost share formula implemented by MSL allows libraries of all kinds to continue to participate in the statewide OCLC contract and make use of cataloging and interlibrary loan tools. The cost for libraries is much less through the statewide license than if the library purchased these services individually. In 2013, The OCLC Statewide Group Services contract made more than a dozen cataloging and resource sharing tools available at a discounted rate to 251 public, academic, school, and special libraries and branches that were enrolled during this period.

**Output:** WorldCat

Montana library staff added records to WorldCat, which increased access to and awareness of those holdings through the WorldCat interface. Original catalog records created access to unique items for the first time and made them discoverable online. Montana library staff filled user requests through interlibrary borrowing and lending, which reduced duplication of collections and saved money on collection development at the local level.

**Output:** Courier Project

*The Statewide Projects Librarian administered the courier project*

Access to a regular courier service reduces the cost of resource sharing of physical materials between libraries. The average cost per item, based on contract value and estimated items sent during this reporting period, was \$0.32.

**Outcome:** This is approximately a 90% reduction in cost compared to standard shipping via mail. This cost savings to libraries means that libraries can devote more of their budget to meeting other funding priorities. In May 2013, a survey was distributed to staff at libraries participating in the courier consortium. 67% responded that the courier service made a noticeable impact in their library circulation numbers and delivery savings; 56%



were also tentatively interested in the possibility of expanding courier service both within MT and regionally. Comments provided on the survey also indicated that there continued to be a wish to have MSL assist with the current courier effort by providing centralized communication tools, collecting consistent and standardized statistics, and participating in discussions regarding contracts and service expansion and development, among other roles and responsibilities.

In 2012, 55 libraries were served through the 19 drop site libraries that were able to participate at discounted service rates. In 2013, the courier service served 54 library locations through 18 drop sites that signed service agreements with Critelli Couriers. The Montana State Library holds the contract with Critelli.

The proven value of the courier network to sharing group libraries supports continued efforts to strengthen the network and keep costs affordable for any Montana libraries that are interested in sharing physical materials for the benefit of their patrons. For libraries, "affordable" means at least being consistently more cost effective than sending via mail. Statistics indicate that volume and cost per item factor into affordability, and that a flat rate does not actually represent a discount for some libraries that do not send and receive a volume of materials on the level of the MSC sharing group libraries.

**Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (Achieved).**

Goal 3 was the highest rated goal by the staff but only accounted for \$146,709.54 or 4% of total LSTA allocations. Closer examination of the logic model for this goal, however, shows that objectives 3.1, 3.2, and 3.3 were integrated with Goal 2 and accomplished; in addition, a wide variety of activities and outputs were accomplished for this goal including Ready2Read training events, Summer Reading training, and traveling makerspaces.

Table 61 - Goal 3, Objective 1 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
Goal 3. MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons.	6.58	12
3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections.	6.58	12
3.1.1. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.	6.33	12

Selected staff comments:

- LSTA has not been explicitly used to expand sharing group participation in this period.
- The various committees and groups within the MSC are in a near constant state of collaboration as they work to share resources and expand services. The ongoing work done by those cataloging and importing records have a direct impact on patron services. Thanks to their collaborative efforts and expanded training on the decisions they have made in this area, the OPAC reflects improvements that are seen and used by patrons.

Table 62 - Goal 3, Objective 2 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools.	5.73	11
3.2.1. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]	5.80	11

- More statewide contracts would be beneficial to many libraries (tutor.com., zinio for example)
- This is important, but also greatly affected by decreased funding from other sources.

Table 63 - Goal 3, Objective 3

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content.	6.27	11
3.3.1. LSTA will be used for MSL staff to explore and establish partnerships for MMP.	6.10	10

Select staff comments:

- More than one staff member would help.
- New partnerships are limited by the capacity of the small staff to do it all.
- Very strongly agree. Not just strongly. This is our future, at least in part.
- This goal was accomplished.

Activity 3.4.2 was rated much lower than all other Goal 4 ratings.

Table 64 - Goal 4, Objective 1

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.4. Continue to develop programming materials and tools for libraries to use (part 1).	5.90	11
3.4. Continue to partner with other state agencies and organizations (part 2).	5.82	11
3.4.1. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community.	5.90	11
3.4.2. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	5.20	11

Select staff comments:

- I am unaware of funds to a life-long learning program beyond having the new librarian.
- As before, it depends on what these tools and materials are, and if they are considered as filling user needs.
- Great job, especially with providing early literacy program ideas and materials to all libraries.
- With a few exceptions, LSTA was not used to purchase materials and items for local programming efforts. The lifelong learning position was created in 2016.

Table 65 - Goal 3, Objective 5 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries.	6.09	12
3.5.1. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)	6.00	12

Selected staff comments:

- Still a key program. Not quite working right, for everyone, as of yet. There's hope if we hang in there.
- LSTA has been used to subsidize courier costs to libraries but not for personnel administering this project.
- This work is continuing and has been emphasized in the MSC partner meetings.

Goal 3, Objective 6 was rated slightly lower than other Goal 3 objectives and based on the logic model it appears that this is one objective that may have not been met in terms of LSTA funds being specifically allocated to achieve this objective.

Table 66 - Goal 3, Objective 6 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives.	5.56	11
3.6.1. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.	5.56	11

Staff comments:

- Unknown to me.
- Strategic partnerships are critical. Capacity to grow and maintain these partnerships is the only limitation.
- Not sure

*Staff and Librarian Perceptions*

- We put significant emphasis on partnerships through our Broadband initiative; one of the things we heard from libraries (BTOP ended)
- We can get distracted here – partnerships need to be aligned to our end goals; we have a staff person that is on the early-literacy (Best Beginnings Advisory Council) council
- Roll out of the Affordable Care Act
- Number of national initiatives that came at the end of BTOP
- This is part of our culture; very strong in developing consortia and collaboration
- Sara Groves, the lifelong learning librarian; Ready2Read
- More talk and more action at the public library level; Glacier County Library (partnered with the hospital)
- The encouraging among libraries is strong; among other partnerships with other organizations.
- One our consultants is always posting for different opportunities; different ways if we are able to those projects they could.
- Opportunities just not time;
- After FY17 – large libraries pay a lot of money; data storage because of new state law (document storage – outside entity that came in and the SL is absorbing this cost and then farms out these costs)

- I think they wrote the book on this – the State Library as a model; Jennie and her staff are just amazing; we are so lucky! They really have shown us how to resource share; seen some minor miracles – they exceed expectations.
- They are forward thinking and problem solving without the SL’s willingness to help problem solve and work with her.
- A community resource – they are going to help us.
- Sometimes they make it so seamless – they facilitate so many things
- Met this goal quite well. When I think of the SL I think of collaboration – consulting, statewide licenses, workshops, and it is all about getting people together; always feel they have the best interest of all of us.
- In particular takes care of all size libraries – young, smart, and no fear from new employees.
- Big turnover with a lot of retirements four to five years; As people change there is more buy-in; there was a pushback from libraries before.

*Goal 3: Logic Model*

3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC (See goal 2.4).

3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above] (See goal 2.1)

3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP (See goal 2.2).

3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. *LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.*

**Inputs:** 0.125 FTE for early literacy position

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Cost of early literacy staff hours	\$10,000.00	\$10,000.00	\$10,000.00	\$28,675.90	\$ 58,675.90
Number of Ready2Read training events offered:	12				12

Number of Ready2Read training (online and in-person sessions, excluding the Rendezvous) attendees	479				479
Cost of Ready2Read Rendezvous Attendees	\$4,007.00	\$15,504.42		\$15,294.14	\$ 34,805.56
Ready2Read program development meeting			\$2,150	\$1,600.00	\$ 3,750.00
Cost of Ready2Read material information	\$7,630.00	\$3,524.82		\$1,623.48	\$ 12,778.30
Ready2Read material disseminated	5,000	60,000		15,000	80000
Cost of Summer Reading Program Training	\$2,150.00	\$1,375.00	\$2,150	\$1,600.00	\$ 7,275.00
Summer Reading Program Training Sessions	12	13	0	7	32
Cost of Summer Reading Program Manuals	\$1,100.00	\$1,100	\$1,375	\$1,375.00	\$ 4,950.00
Summer Reading Program Manuals Disseminated	440	110	110	110	770
Cost of Summer reading public service announcements		\$270.00			270
Summer reading public service announcements		6			6
Cost of MT Makers traveling makerspaces	\$18,446.78	\$18,446.78	\$4,656		\$ 41,549.56
MT Makers traveling makerspaces disseminated		18	6		24
Number of libraries that hosted makerspace kits		21	15		36
Number of programs hosted by libraries during this period that made use of the makerspace kits		52	33		85
Number of attendees at maker programs		1,647	1,254		2901
Cost of Share Your Story		\$2,082			\$ 2,082.00
Share Your Story Kits		4			4
Share Your Story Interviews		8			8
Cost of Ready2Read Rendezvous Training				\$15,294.14	
Ready2Read Rendezvous Training Attendees				45	

**Outputs:**

The purpose of the Montana Makers traveling makerspace pilot was to create opportunities through local libraries to expose primarily school-aged Montanans to STEAM (science, technology, engineering, arts, mathematics) tools and resources that are not otherwise easily accessible in most Montana communities. Additionally, library staff across the state would have the opportunity to try out maker materials before committing funds to purchase materials that would be appropriate for their communities.

**Outcomes:** The programming focus was most heavily concentrated on the more traditional arts and crafts elements of the kit, as library staff reported their level of familiarity and comfort was highest in this area. 100% of reporting sites organized arts activities (4); 50% planned science-based formal programs (2); 50% planned technology programs (2); 50% planned activities with a focus on engineering (2); and 25% planned math activities (1). Library staff themselves reported having gained new experiences from using the technology and electronics tools in the kit, as many of the staff had never had the opportunity to use them before. The most frequently reported challenge and

request was the need for additional training on more complex pieces like the programming tools such as the Arduino. In response, MSL staff offered additional “drop in” sessions and also partnered with a vendor to host a Google Hangout and cover the fundamentals of programming the Arduino.

“I was able to attend the Maker Space workshop and a staff member attended the STEAM story time workshop at the end of September, so we are feeling pretty comfortable with the kit and excited to start using it. I’m really excited about this opportunity and want to thank you, State Library, and IMLS for this wonderful opportunity to connect more with our patrons. There are so many things we are being encouraged to participate in right now, it is so helpful to have the kit and guidance to provide us with a solid starting point. It makes it “do-able” instead of overwhelming.” (Glacier County Library staff)

Of the 15 libraries that hosted makerspaces during this reporting period, eight responded that they initially wanted to host a maker kit “to increase young adult/teen programming”; six responded “to increase STEM related programming”; four responded “to provide new services and new opportunities through the library”; and four responded “to try out makerspace materials before purchasing.”

In the evaluation, these libraries responded that they were successful in increasing STEM related programming (10 responses); providing new services (five responses); increasing community participation in library programs by attracting new users to the library (four responses); and increasing the number of programs for young adults and teens (two responses). Hosting libraries almost unanimously stated that they benefited from being able to test makerspace materials through the pilot before purchasing items for their libraries (13 responses). In the pre-hosting application, most (12) hosting libraries stated that they believed “technology” would be of greatest interest to young adults, followed by building (five), arts (four), and science (three).

In the post-hosting evaluation, technology did not fare quite as well with only eight libraries stating that those tools had been the most widely used. Arts and crafts (nine) were most popular. Ten libraries responded that technology tools had been used the least, in part because pieces such as the Arduino were difficult for library staff and volunteers to understand in a short amount of time in advance of planning programs. When asked what changes they would suggest for improving the content of the maker kits, five libraries suggested “more project examples from other libraries, better documentation, and more training;” four libraries suggested that content be separated into smaller, separate kits with a more specific focus; and three libraries requested more consumable materials (paper, glue, batteries) and accessories as these expendable items became a

considerable expense in sustaining programs. Libraries identified partners in their communities as being predominantly professionals or experts in a specific field (scientists, information technology professionals, medical professionals, engineers, and electricians, among others); or K-12 school faculty and students or student groups. Local organizations and afterschool groups such as the YMCA, 4-H, and the county extension office were also identified as program partners. Two libraries reached out directly to neighboring libraries to partner on programs or to ask for advice on planning programs.

“I have heard many of our youth settling for mediocrity and never hitching their saddle to a distant star. They don’t believe that they are smart enough to try for things in the science and technology arena. I want them to know that their library believes in them and that we can provide resources to help them reach for the stars and be that amazing person that they are meant to be.” (Glendive Public Library) "There was enough technology to do several months’ worth of programs. We used MaKey MaKey to make a giant, foot-operated game controller and banana keyboard. The teens also made an AM radio with the Snap Circuits. Other programs using skills developed with the kit included an hour of code and 3D printing. These numbers are huge for us and clearly show that the kit was a success. We plan to continue providing DIY/maker supplies for teens throughout the school year." (Belgrade Community Library staff)

**Output:**

Share Your Story was an LSTA-funded pilot that circulates portable digital audiovisual recording kits to libraries on a rotating basis. Hosting library staff is trained to use and make these tools available to record their communities’ stories in audio or video format. These stories are then collected and uploaded to several locations, where appropriate: the dedicated project website, the MSL Vimeo channel, and the MT Memory Project, as well as the contributing library’s website, if desired.

**Outcomes:**

Previously undocumented cultural heritage from the local community is documented and shared. • Community awareness of library resources and programs increases. • Presence of library resources and programs in the community expands. • Project that promotes intergenerational activity generates strong turnouts/participation. • New patrons visit the library or make use of library services. • Patrons have the opportunity to learn new technologies and skills. • Staff feel more confident with hands-on technology training, and offer increased or more varied opportunities to library patrons. • Community partnerships are formed or expanded to assist in promoting and collect stories.



**Output:**

This funding supported the Ready2Read Rendezvous. Training was offered at the 2015 Rendezvous featuring developmentally appropriate play spaces in libraries and how to integrate play in library programming and space; how to integrate early literacy and developmental information into story hours for mixed ages; and how to position your library as a center of the community for youth programming.

**Outcomes:**

Following the Ready 2 Read Rendezvous, a total of 12 libraries incorporated Countdown to Kindergarten programs in their libraries during this reporting period. These include large libraries such as the Bozeman Public Library and ImagineIf Libraries in Kalispell, but also small libraries such as Glacier County Library in Cut Bank, which serves the Blackfeet reservation, and the James E. Shanley Tribal Library which serves the Fort Peck reservation.

An outcome based on attendance at the Ready 2 Read Rendezvous from ImagineIf Libraries in Flathead County, Montana:

"We did implement an Early Literacy Kit project with our City-County Health Department. The idea for the kit came out of Ready 2 Read Rendezvous 2015; each kit contains a board book, egg shaker, information about the texting program, a mini poster with early literacy tips, a library card, and days and times of all of our library programs. The kits have been a huge success so far. We trained home visiting nurses on early literacy practices and they bring the information to their clients in their homes or in the case of WIC, during office visits. "

In the three months since we started the program, we have given out 140 kits to clients through WIC (Women, Infants and Children) and the Healthy Montana Families program, which sends nurses to visit clients in their homes and teach them about healthy parent-child relationships, safety and early learning. The feedback from Health Department staff and kit recipients has been overwhelmingly positive, with 100% of recipients agreeing with the statement:

"After practicing the skills from the library kit, I feel prepared to help my baby or child be a successful person and arrive at school ready to learn. "

We have also collected comments from recipients and learned that the kits can have a major impact on people's lives. Here are a few quotes that we received thus far:

- 'My baby was born in September. I never thought to start reading to him so soon. So glad to have books to start reading to him.'
- 'This is a book I wanted to purchase for my child that I couldn't afford, and now we have it.'
- 'I'm excited to read the book to my new baby when he arrives.'
- 'I'm able to continue teaching my son in my native language and also in English now that I have another book to read to him.'
- 'I'm excited to take my daughter to library; I forgot it was an option for small children.'
- 'We read more than one book each day now.' "

Another outcome based on attendance at the Ready 2 Read Rendezvous, from Glacier County Libraries in Cut Bank, Montana (which also serves the Blackfeet reservation):

"We did incorporate many ideas from the Ready 2 Read Rendezvous and the awesome training we received there! Many of the ideas for our 'Explore IT' Bench/Wall in our children's area were adapted on a smaller scale from the training there both from Jeri with the Boston Children's Museum and from the Storyville concept. (The changeable themes with our mini market stall and the "mouse house" are 2 examples). We were so inspired! Bess always handles Story Time for the month of August, so she decided to do 'Kindergarten Kamp' for the entire month. The themes she presented were: Scissors School, Dress for Success, Lunch Time, Riding the Bus, and Friendship. We purchased little supply boxes and each week they got to add a new school supply to their box and then on the last week they took them home. We had 20 participants and the parents were very appreciative of the program, with new participants that had not attended Story Time before. We also had positive feedback from teachers who thought this was a wonderful idea."

Additionally, all Ready 2 Read Rendezvous participants had to attend a webinar to provide updates on their year-long projects. Each webinar had about eight attendees during which each participant shared their project and provided details as to the success they had experienced thus far and the challenges. Participants worked together to brainstorm solutions for challenges. Participants then had to provide a written project update to the Early Literacy Coordinator. Additional training needs were identified in this process (managing volunteers, working with community partners) for which later webinars were scheduled.

3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)

3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs (The BTOP grant focused on this objective but it did not use LSTA funds although BTOP staff consulted with LSTA funded staff; no other attributable activity on this objective).

**Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (Achieved).**

This was the second highest rated goal and accounted for \$767,876.12 or 19% of all LSTA allocations from 2012-2015. Significant outputs include the conversion of 1,144 titles from analog to digital format, a patron outreach project (POP) which added 1,588 additional patrons, and the distribution of 1,231,614 items from 2012-2015.

Table 67 - Goal 4, Objective 1 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
Goal 4. MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons (part 1).	6.42	12
Goal 4. MSL provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (part 2).	6.25	12
4.1. Continue digitization of recorded Montana materials.	6.25	12
4.1.1. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.	6.50	12

Select staff comments:

- Some materials had been digitized, but this process has been nearly stopped due to lack of funding. There are many more books with Montana interests on the list to be recorded and

converted to digital. The software has been purchased, but more cases and containers could be used.

- I'm part of TBL so I am all for this, and am more familiar with its operations and user needs.
- These goals were accomplished.
- Patrons of MTBL who have come from other places in the US have commented on an improvement in access and service when they come to the Montana agency. The recording studio has various teams working on digitization throughout each day.

Table 68 - Goal 4, Objective 2 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers.	6.36	12
4.2.1. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	6.09	12

Staff comments:

- More promotion of this is needed so the public is aware.
- Not enough information
- MTBL staff are sent for training on new equipment as it is available. They are also given the training URLs for various other products their patrons may use.

Table 69 - Goal 4, Objective 3 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available.	6.75	11
4.3.1. LSTA will be used to purchase KLAS upgrades and provide system maintenance.	6.75	11
4.3.2. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	6.56	12

Staff comments:

- Don't know enough to be sure.
- KLAS gets updated on a regular basis and staff at MTBL have a working relationship with that vendor.

Table 70-Goal 4, Objective 4 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
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Answer Options	Rating Average	Response Count
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons.	6.00	11
4.4.1. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	6.14	11

Staff comments:

- unknown
- I don't know what POP is. I'm sure the state library is doing it, but I don't know it by that term.

Table 71 - Goal 4, Objective 5 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.5. Increase the amount of accessible materials to individuals who cannot read standard print.	6.18	12
4.5.1. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	6.18	12

Staff comments:

- Increased access has come from the National Library Service not the State Library. The Montana audio collection is expanding at a very slow rate.
- Patrons are impressed with the amount of braille twin vision books for children that MTBL has. MTBL purchases and uses the materials to have these books brailled in-house. New materials are added on a near weekly basis.

Table 72 - Goal 4, Objective 6 Staff Satisfaction

To what extent do you agree that the State Library has accomplished the following over the past five years:		
Answer Options	Rating Average	Response Count
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services.	6.27	12
4.6.1. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.	6.36	12

Staff comments:

- MTBL is part of the outreach efforts and promotional materials are included. I wonder how many people are reached through these efforts.

### *Staff & Librarian Perceptions*

- Thrilled that we have added a new recording studio; growing demand for the TBL
- The National Library Service
- TBL is a highly valued program.
- TBL – yes, we have been pretty successful
- No benchmarks – did not really define success
- We made progress.
- Minimized in outreach services; break in staffing for two years but that has been corrected
- Could we generalize this more to other people.
- I have not dealt with it and if they do not do it no one else would
- I have not heard much about this nor have I explored it
- Over the years maybe 10 people (have asked about it); someone requested a doctor’s signature.
- We have offered these services – if we do not let it be known and people do not see us as a resource they will not use it.
- Need to revisit training and marketing and outreach and take advantage of it; at the last convention someone did talk about the Talking Book program
- I have a lot of my patrons who use the TBL – parents helping children with learning disabilities.
- I don’t think this is well communicated well across the state; 26 years I have been here – only twice has anyone asked me about it; they don’t know it exists or how to access it; lots of patrons, teachers, and students who don’t know it exists. Can get to it in the shared catalog but need to better advertise it.
- We have had very positive results with TBL – quite a few patrons that use it; it is their godsend; family members were really depressed and after introduced to talking books – they are just a different person. Don’t let this ever go away – people who use it and love it. You have no vision, physical or reading disability – we have a lot of just amazing testimonials about it; our veteran’s home and nursing homes promote TBL.
- I’m aware of it but have not used it. Mentioned it but not taken advantage of it.
- I think it is really important – we just don’t see so much of this; we are not really in the mix
- They are quiet at what they do; if they were not there, whole communities would be disenfranchised; great job moving into the future.
- They focus on Montana books as well.
- Bozeman – other communities; with outreach to other diverse communities; more and more signage is in Mandarin.

*Logic Model*

4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.

**Inputs:** 6 FTE and 90 volunteers

This funding covers staff salaries and operations for the Montana Talking Book Library (MTBL). Established in 1968, MTBL provides eligible Montana patrons, ages 3 to 103, with direct personal one-to-one patron service and support for ordering, receiving and/or downloading audio and Braille materials.

Activity/Output	2012	2013	2014	2015	Total
Number of Montana titles converted from analog to digital	597	287	35	225	1144

**Outputs:** As part of the Patron Outreach Project (POP), patrons were initially surveyed in 2013 and asked for their input on what significance and value they place on MTBL services in their lives. We received an 81% patron response. When asked what, if any, impact MTBL services had on the patron’s quality of life?

**Outcomes:** 100% responded positively, with 89% indicating the main leisure reading and entertainment they receive is through MTBL services. 100% indicated they would recommend MTBL services to everyone with a visual, physical or reading disability. 97% indicated they would not have the quality or accessibility of leisure reading materials without MTBL services, siting transportation, and other limited resources available to them. 3% of patrons indicated they have the resources to afford other leisure reading resources, but utilize MTBL services as their main source of reading and entertainment. 90% indicated the quality of the MTBL and NLS collections are excellent with emphasis on the new easier to use and play digital program; while 10% indicated they will miss the cassette collection and player. An overwhelming 100% indicated excellent service from all Readers’ Advisors in areas of response to patron requests, suggested reading materials and technology support.

**Output:** A Digital Transition strategy, developed to convert local Montana analog titles to audio digital, was approved by the Montana Legislature for one-time monies starting on 07/01/2013 through 06/30/2014. It was anticipated that one-third of the local collection would be digitized during that time. In the time period covered in this reporting period, 50 Montana cassette titles were converted to digital. MTBL submitted its first locally recorded digital book “Hand Raised: The Barns of Montana” to NLS for potential nationwide patron enjoyment in the online BARD collection. This creates an additional resource for nationwide Talking Book Libraries to offer their patrons and increases efficiency by not having to utilize an interlibrary loan process.

**Outcome:** The MTBL Digital Recording Program converted 25% (or 231 titles) of our local cassette titles to digital cartridges. New recording software and equipment were purchased during this time period to offer improved audio quality services and software security. The benefit to MT patrons is access to a higher quality of available MT audio titles from a TBL local recording studio.

4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.

**Inputs:** 6 FTE

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Number of patrons trained to use BARD	168	58	41	44	311
Number of institutions trained to use BARD	24	5	12	2	43

4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.

**Inputs:** 6 FTE

**Outputs:** Keystone Library Automated Systems (KLAS) updated the MTBL KLAS database system in February, 2014, which offered staff additional database functionality in administering patron support. NLS contracted to receive more commercial books from publishers.

In April 2015, the MTBL Reader Advisor and Keystone automated database (KLAS) software administrator attended the KLAS Users’ Conference in Oklahoma City, Oklahoma.

**Outcome:** MTBL staff worked with KLAS staff to develop and install a completely redesigned catalogue subject code heading system that would better meet the needs of MTBL patrons, create a more expedited way to get books to patrons faster, as well as give more accurate support to MTBL staff in searching the catalogue. The redesign of the KLAS catalog subject code system greatly improved searching capabilities over what the original database system offered. The end result created a much easier and quicker mechanism of finding the desired books for patrons.



4.4. *Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.*

**Inputs:** MSL/MTBL contracted with a marketing firm to develop a 13-month Patron Outreach Project (POP) with the goal of increasing awareness of MTBL, new patrons, and establishing sustainability.

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Patron Outreach Project (POP) new patrons added	1051	537			1588

Measurable increases in the MTBL project due to the Patron Outreach Project included: MTBL experienced an increase of 6% in new patrons, welcoming 514 additional new patrons to the service; a 4% increase in phone inquiries regarding services, and a 5% increase in distribution of patron applications and brochures.

**Outcomes:** The Patron Outreach Project came to an end on December 31, 2013. The objectives to increase awareness about MTBL were successfully met through educating the public about MTBL services using advertising, social media avenues, and newly revised brochures, mailers, and posters. The project reached at least 503,531 Montanans statewide through newspaper ads, with over 3,000 radio spots, and over 1,200 TV public service announcements and paid ads, including ad placement in specialty magazines and publications. Success was also measured by a 29.6% increase in new patrons signed up with MTBL, a 17.2% increase in new patrons downloading materials, and a 117% increase in public requests for MTBL applications for prospective patrons and institutions.

4.5. *Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.*

**Inputs:** 6 FTE

**Outputs:**

Activity/Output	2012	2013	2014	2015	Total
Number of Patrons Served	16,299	5,237	2,991	3,113	27,640
Items Distributed	698,226	202,029	147,892	183,467	1,231,614
Number of books downloaded from BARD	87,773	19,790	23,525	28,795	159,883
Number of Braille patrons	116	69			185
Number of Braille books delivered:	14,686	2,332	82	12,169	29,269
Number of patron requests answered by Reader Advisors	61,177	14,882	18,953	12,169	107,181

Number of BARD titles duplicated for non-BARD patrons:	5,820	1,568	1,060	1,752	10,200
Number of magazine issues distributed:	69,292	17,894	12,417	12,353	111,956

**Outcomes:** Responses to a patron survey on MTBL services were overwhelmingly positive. 80% said that they found MTBL services essential to their quality of life; and 20% would be challenged to find other affordable online resources to serve their needs.

**Circulation:** an increase of 1.5% in USPS processed materials; a total increase of 20.7% in overall circulation of processed materials. BARD downloads increased by 19.2%

**Output:** MTBL created a small internal children’s collection of Twin Vision for Pre-K to 3rd grade. This collection includes Pre-K board books and tactile image books. Twin Vision books are created by taking a standard print book with illustrations and transcribing the text into Braille on a clear plastic overlay inserted on the page.

**Outcomes:** Ensures free, accessible and easy-to-use library materials with personal support to state residents who cannot use standard print due to a visual, physical, or reading disability. Reader Advisors fielded 27% more requests from patrons

**Output:** The Duplication on Demand Cartridge Program creates access to digital titles in a physical cartridge format for patrons who do not have the resources to access online BARD titles.

**Outcomes:** A total of 1,568 titles were duplicated during this reporting period, reflecting the recycling of every cartridge and container originally purchased to maximize LSTA money.

4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.

**Inputs:** 6 FTE

**Outputs:** New brochures and posters were designed for a variety of outreach efforts to include having a presence at appropriate conferences such as Montana Library Association, Brain Injury Alliance Organization, all three Montana Blind and Low Vision Support Organizations, Montana Education Association, Montana Special Education Association, Montana Ophthalmology Academy, Montana Optometric Association, Montana Veterans Association, Montana Nursing Home and Assisted Living Organizations, and community organizations.

MTBL staff led or participated in trainings, conference presentations, or information sessions for MT Governor Steve Bullock, the General Federation of Women’s Clubs of MT, newly blind and low vision patrons attending a Summer Orientation Program, the MT HealthCare Association, consumer groups including Brain Injury Association of MT, MT Association of the Blind, National Federation of the Blind-MT, and American Council for the Blind-MT; all MT Blind and Low Vision department low vision support groups; NLS National Biennium Conference; Pacific NW Library Association Conference; Helena College-UM Student Disability Service; Carroll College Volunteer Fair; multiple retirement facilities; statewide community clubs and organizations; and blind and public elementary school special education teachers and parents. MTBL also collaborated with Perkins School for the Blind to offer legally deaf and blind Montanans technology benefits through the national iCanConnect program; and with independent Orientation and Mobility Counselors, vendors, and organizations to provide demonstrations of various devices to patrons using the MTBL Patron Center.

MTBL staff presented training and outreach to these organizations: Montana Blind and Low Vision Department; Montana American Council for the Blind (MACB) consumer group; Montana Veterans Administration; Butte Housing Authority; various chapters of the Montana Association for the Blind; Montana Library Association; National Federation of the Blind – Montana chapter; Great Falls low vision group; Touchmark retirement home book club; Overhear Consulting Company; Montana Health Care Association; and Eagles Manor retirement home. Additionally, MTBL staff provided information and demonstrated services for state legislators at the Montana Library Association’s Library Legislative Day in January 2015.

**Were Any Goals Not Achieved?**

Out of 12 staff responses, 11 felt that all four goals had been accomplished.

*Table 73 - Were Any Goals Not Achieved?*

<b>Were any of the following four State Library LSTA goals for 2013-2017 NOT ACHIEVED as anticipated (select all that apply) (A-1 sub question)?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.	8.3%	1
Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.	8.3%	1
Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons.	8.3%	1
Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need.	8.3%	1
All four of our LSTA goals were met.	100.0%	12

Please discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed to the lack of progress for any of the four goals (A-1 sub question)?	1
<i>Answered Question</i>	<b>12</b>

Staff comments:

- MTBL goals were maintained, but not exceeded, due to staffing issues (extended illnesses and retirements). MTBL was short staffed especially during 2015-16. In the last 5 years, 4 of the 6 positions have had staff changes. A larger budget would always be nice in a library setting. Conversion to digital books has been virtually halted due to the need of staffing to convert older RC platforms to digital formats.

**Retrospective Question A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?**

Staff and librarian participants were asked to rate their satisfaction with how well each of the IMLS Focal Areas were addressed. The top four were Lifelong Learning, Information Access, Civic Engagement, and Institutional Capacity although none were rated higher than 5.3 out of 7.0. Focal Area 5 (Human Services) also was somewhat addressed and Focal Area 4 (Economic & Employment Development), which has not been a priority with LSTA funds, will become a higher priority with the creation of a new Lifelong Learning full-time employee starting in the fall of 2016.

Table 74 - Satisfaction with Progress Towards Focal Areas

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
<b>1. Lifelong Learning (MSL Goal 3)</b>	5.32	95
<b>2. Information Access (MSL Goals 2, 3, 4)</b>	5.24	90
1.2. Improved users' general knowledge and skills	5.10	92
<b>6. Civic Engagement</b>	5.09	81
2.1. Improved users' ability to discover information resources	4.97	92
6.1. Improved users' ability to participate in their community	4.97	86
<b>3. Institutional Capacity (MSL Goals 1, 3)</b>	4.96	84
2.2. Improved users' ability to obtain and/or use information resources	4.95	89
3.3. Improved library operations	4.94	91
5.3. Improved users' ability to apply information that furthers their parenting and family skills	4.92	88
3.1. Improved the library workforce	4.90	90
3.2. Improved the library's physical and technological infrastructure	4.87	90
6.2. Improved users' ability to participate in community conversations around topics of concern.	4.83	85
<b>5. Human Services</b>	4.68	76

1.1. Improved users' formal education	4.64	90
4. Economic & Employment Development	4.59	82
4.1. Improved users' ability to use resources and apply information for employment support	4.56	91
4.2. Improved users' ability to use and apply business resources	4.49	90
5.1. Improved users' ability to apply information that furthers their personal, family, or household finances	4.48	85
5.2. Improved users' ability to apply information that furthers their personal or family health & wellness	4.44	85
	4.85	

Select focus group and survey participant comments on each Focal Area.

### 1. Lifelong Learning (MSL Goal 3)

Table 75 - Satisfaction with Focal Area 1

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
1. Lifelong Learning (MSL Goal 3)	5.32	95
1.1. Improved users' formal education	4.64	90
1.2. Improved users' general knowledge and skills	5.10	92

Select focus group and survey comments:

- Civic engagement (just talking to our Americorps coordinator; the library could help our program; our chamber of commerce meets at the Library; people often do not know how to run meetings or organize committees and organizations)
- Economic and employment development
- Not really addressed it in this fashion – we do not work with our office of our public instruction to try and coordinate
- We would love to work with OPI
- Tutor.com was invaluable to many students K-college.
- Eliminating funding for Tutor.com and Ebsco databases has decreased our K-12 and college students' access to educational learning tools.
- Access to Webucator online classes as well as to Webjunction classes is very useful.
- MSL provides good training for librarians, who in turn provide services to users, but I don't see a lot of direct education of users.
- Many workshops are provided at state conferences. Fall Workshops put on by the State Library staff address these issues.
- I would say the State library has focused strongly in lifelong education. I see formal education as schools and colleges and I don't think that's where MSL has focused. Rather they have focused in library's early literacy, and wider access to information.

- With new Lifelong Learning Librarian, this will see more concentrated focus and growth in the next planning cycle.
- Proctoring training for distance ed- training on creating proctoring spaces and services, is needed now more than it was 15 years when I couldn't find those services in libraries.
- It seems as if there has been a push to encourage the use of the library across the "age board." From early age promoting the love of books and reading, the use of the library to access information, and as a way to continue with long distance learning (proctoring tests).
- Made a Lifelong Learning position and then hired a person to oversee this.
- We now support our own databases so our students can be college ready.
- I believe any library services contribute to lifelong learning. Our public library does help students but most reference-type services are for those not in formal education. How MSL improves users' general knowledge and skills is by offering training to staff in libraries
- I started working at my current library in 2015, so I cannot speak as to the headway made toward these goals prior to that time; however, since I started, the MSL has discontinued its EBSCO subscription and raised the cost of my library's subscription to MontanaLibrary2Go. Both of these occurrences do not lend themselves to supporting lifelong learning and the pursuit of knowledge, at least for patrons. The CE program for staff is commendable.

## 2. Information Access (MSL Goals 2, 3, 4)

Table 76 - Staff and Librarian Satisfaction with Focal Area 2

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
2. Information Access (MSL Goals 2, 3, 4)	5.24	90
2.1. Improved users' ability to discover information resources	4.97	92
2.2. Improved users' ability to obtain and/or use information resources	4.95	89

Select focus group and survey comments:

- Small libraries cannot afford subscriptions to databases for their patrons.
- The information resources we used most were Ebsco databases.
- It is very difficult to promote databases. Even though they are provided, it is hard to encourage users to use information resources.
- Enterprise patron access is much clearer than the former eLibrary and Bistro. EBSCO databases can no longer be accessed due to lack of funding at the state level.
- Again patrons have stated they cannot access the digital collection on a consistent basis.
- I believe we have really fallen behind on these areas. The website is cumbersome, inaccurate and difficult to navigate. Funding decline has also affected resource availability
- Fabulous through this summer, but loss of statewide databases will have an impact on these service areas.

- again databases cut off
- Sometimes, it's overwhelming how many resources are available. Having too many options can be more frustrating because instead of learning everything there is to know about one resource, I personally only know a little bit about a lot of resources.
- Loss of EBSCO limits information.
- The state library's website although it has a lot of valuable information, is not the easiest tool for some demographics in Montana.
- I still think resources are hard to find for the average patron online.
- The State Library has provided information resources even though they weren't necessarily used by the public the way everyone hoped.
- This will not be a future strength of the state library system unless we get stable funding.
- As already mentioned, the discontinued access to EBSCO databases and increased cost for MontanaLibrary2Go (at least for my library) undermines patrons' ability to access and use information resources.

### 3. Institutional Capacity (MSL Goals 1, 3)

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
3. Institutional Capacity (MSL Goals 1, 3)	4.96	84
3.1. Improved the library workforce	4.90	90
3.2. Improved the library's physical and technological infrastructure	4.87	90
3.3. Improved library operations	4.94	91

Select focus group and survey comments:

- CE program and consulting (was a taskforce priority)
- Broadband technology
- Courier service is great but challenges for those not on the route.
- We appreciate the technological resources and support we have as a member of the MSC.
- Thank you for adding new Montana Shared Catalog staff.
- We can contact the State Library for answers to our particular problems with technology and library layout.
- A work in progress. Not there yet by a long shot.
- In regards to operations, the training and information from the state library has a positive impact on the library operations for those who participate and apply the info.
- I feel like this relates more to our funding, which we get from the county. I know we get some State money, but, for example, the state isn't going to pay our wages so we can be open more than 25 hours a week.
- Digital Library reorganization was critically important.
- It has been my experience that the State Library has been of limited assistance to

our library as we are a branch and have been told we need to work through the County Library and the Commissioners. I did observe on one occasion where our Director called to get advice and was "gently" denied help.

- Something needs to be done about the low wages offered to paraprofessionals, even though that is primarily a local issue unique to each library and its tax base.
- I would like to see the State Library use their wealth of knowledge on how public libraries are created and intended to operate so that the communication between the library and the local governing body were more clearly defined and with a mutual understanding of such things.
- The consultants are available to help with organizational problems and provide solutions that benefit the library.

#### 4. Economic & Employment Development

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
4. Economic & Employment Development	4.59	82
4.1. Improved users' ability to use resources and apply information for employment support	4.56	91
4.2. Improved users' ability to use and apply business resources	4.49	90

Select focus group and survey comments:

- There is a need for librarians to become better advocates; one primary area is in economic development
- BTOP program that ended in 2011;
- We do now through makerspace kits; business development centers and resources
- Supporting entrepreneurship
- Become more involved in the economic development statewide association; need to encourage all libraries to do this; creating opportunities to become engage in their local communities; changing nature of the role of libraries; get them away from desk and out of libraries.
- We do not have coordinated efforts to meet these goals within our Division
- We do have a consultant interested in community outreach
- We expect these to be addressed with the Lifelong learning position
- Both 4 and 5 will be prioritized
- Our NAC will be looking at the priorities; 5 may be a higher priority
- LSTA consultant provide training
- makerspaces
- Access to databases is limited by subscription prices.
- Patrons can find the resources though State Library webpage and our own.
- I would like to see a training on resources available for patrons as far as employment goes.
- With limited local opportunities, staff work to be helpful to our patron's need in



maneuvering through the State's sites. We have offered classes on creating job searches and resumes. It also seems that the State is working to find a way to continue without our local area resources (Coal). At a recent conference, it seemed as if it was a bad thing to be from our area and that there was little empathy for our situation.

- I do not recall many webinars or resources addressing employment support to patrons, though there are already resources in our county to meet those needs.

## 5. Human Services

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
5. Human Services	4.68	76
5.1. Improved users' ability to apply information that furthers their personal, family, or household finances	4.48	85
5.2. Improved users' ability to apply information that furthers their personal or family health & wellness	4.44	85
5.3. Improved users' ability to apply information that furthers their parenting and family skills	4.92	88

Select focus group and survey comments:

- the texting program
- The Ready2Read program has parenting information that helps patrons.
- There could be more information for personal, family and household finances available online to the users as a easy access link (with instructions as user friendly)
- The State always offers some form of early childhood training, and I think that's so important.
- Early Learning focus.
- We attempt to offer programing and opportunities for family interactions and education. I do not know of anything MSL promoted
- I recall some webinars to this effect, but not much else. These are issues that staff at our library strives to tackle on a day-to-day basis (like most public libraries), so more support would be welcome.

## 6. Civic Engagement

To what extent do you agree that the Montana State Library addressed the following national Focal Areas from 2013-2016?		
Answer Options	Rating Average	Response Count
6. Civic Engagement	5.09	81

6.1. Improved users' ability to participate in their community	4.97	86
6.2. Improved users' ability to participate in community conversations around topics of concern.	4.83	85

Select focus group and survey comments:

- Area highly identified by the taskforce
- physical facilities are not supported; can we improve broad band capacity
- Not really had programs that directly relate to that
- Not sure how to address this – is this a priority for us or the state library association?
- We can only do so much.
- I thought the "Get Outside" campaigns were helpful with this.
- State Library sends libraries information on possible ways to connect with the community.
- They are always pushing us to be more involved in our communities as librarians. They tell us to "have a seat at the table."
- Geographic and natural heritage information in particular.
- This is probably at our core, going forward.
- Wish we had known about the statewide database precarious situation earlier and had the chance to comment on it before eliminating them was a fait accompli.
- Summer Reading Program encourages interaction with patrons and the community.
- They told us to get as many people together as possible so that all walks of life are present from your community and see how the library could help.
- Making known the resources provided by established organizations, such as Humanities Montana, has enabled libraries (including the one where I work) to host important community conversations.

**Retrospective Question A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities?**

Staff identified three focal groups that were clearly addressed: individuals with disabilities, the library workforce (current and future), and families. They were less sure about children (0-5) and school-aged youth (6-17).

Table 77 - Focal Groups Focused on in Five-Year Plan

Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes = 10% or more of LSTA funds were allocated toward that specific group)?			
Answer Options	Yes	No	Response Count
1. Individuals with disabilities	10	0	10
2. Library workforce (current and future)	9	0	9
3. Families	8	1	9
4. Children (aged 0-5)	6	2	8

5.	School-aged youth (aged 6-17)	5	3	8
6.	Individuals with limited functional literacy or information skills	4	5	9
7.	Ethnic or minority populations	2	6	8
8.	Individuals living below the poverty line	1	7	8
9.	Individuals that are unemployed/underemployed	1	6	7
10.	Immigrants/refugees	0	8	8

Select staff and librarian comments:

- TBL focuses on individuals with disabilities, so they represent the majority of the users I provide services for.
- Given the paucity of our financial resources, we don't have the luxury of targeting meaningful amounts of funding on any one user group. Instead we do our best to select programs that impact several groups at once. And if these groups are not equally recipients of the benefits of these programs, with luck, we have done enough to affect their lives in positive fashions. This would be a meaningful question if MSL had, for example, 3 to 10 times the financial resources it currently has to address our users and partner's needs.
- Need to also focus on the non-struggling groups
- We need to (be) wise enough with the resources to meet the needs of the groups we prioritize
- In Billings – 30% have the MLIS degree; keep pushing that MLIS degree; not the bottom line; you don't have to have the degree to run a library – business and personal skills; would not dismiss it as not important though.
- The training and accreditation – we are required to take classes throughout the year; getting certified helps; small towns would not be able to afford a degreed person.
- Rural libraries the director needs to have common sense and be able to work with people.
- Greater focus on immigrant families (ESL) (from Africa and the Congo)
- Immigration is a big issue; making current patrons aware of the other communities; disabilities, functional literacy, and families
- children ages 0-5, families, those just a bit above the poverty level, individuals with disabilities
- Poverty line, families, unemployed/underemployed
- Functional literacy, Poverty, Disabilities
- Both children groups (they are our future), individuals with disabilities
- Living below the poverty line
- Library workforce – the SL's commitment to continuing ed and training (staff are strong across the state)
- Limited functional literacy or information skills (to stay above the poverty line)
- We are going to see more immigrants and refugees (where many people go first) – a whole group from the Congo; libraries need to support to have the tools to provide new immigrants with resources
- Families – they are so disjointed.
- OPI and the Montana State Library – they should be able to communicate more than

they do; they rely heavily on the SL; they just don't do their job; school libraries are kind of dependent on the SL

- School issue – what is the quality of libraries?

#### IV. Process Questions (B-1 to B-3)

##### **B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?**

The staff felt satisfied overall that SPRs were used to help guide overall Five-Year plan activities.

To what extent do you agree with the following statement:		
Answer Options	Rating Average	Response Count
The State Library used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan (B1).	5.78	11

Qualitative comments from interviews, focus groups, and survey responses suggests that SPRs were not used “as much this plan” (staff survey response, December 2016) but they were used to help identify activities and provide snapshots for how they were doing. It was noted that the old version was a bit heavy and text based but that the new version is more data driven and outcome-based, which will be easier to use for planning purposes. As another participant noted, “We could use it better” (Staff survey participant, December 2016).

While SPRs appeared to be tangentially used to determine future activities, the new data-driven SPR along with the future potential use of a logic model for the next five-year cycle will help increase its use and impact.

##### **B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.**

The staff rated this lowest rating (4.0 out of 7.0) in terms of satisfaction. But, despite major changes in staff including the State Librarian during the 2013-2016 period of the plan as well as budget cuts at the state level, the general sense is that the plan remained the same although less emphasis was placed in certain areas due to budget constraints.

To what extent do you agree with the following statement:		
Answer Options	Rating Average	Response Count
The State Library made changes to the Five-Year Plan (B2).	4.00	11

**B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?**

SPR data was consistently and annually shared with their State Library Commission (their governing body), Network Advisory Council (NAC), and governor’s office. They are also posted on their website, used internally, and also shared on their state listserv.

To what extent do you agree with the following statement:		
Answer Options	Rating Average	Response Count
The State Library shared data from the old and new SPR and from other evaluation resources (B3).	4.89	11

**V. Methodology Questions (C-1 to C-4)**

**C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of Evaluators.**

The Montana State Library selected Dr. Anthony Chow and Strategic Performance Systems, LLC from Greensboro, North Carolina. Dr. Chow is an Associate Professor at The University of North Carolina at Greensboro’s Department of Library and Information Studies and is CEO of his own consulting firm. This LSTA evaluation was rigorous, objective, and conducted by an independent, third-party evaluator from outside Montana with no previous connections or relationships with the State Library or any of its representatives. Dr. Chow was selected largely because of his requisite expertise in statistical and qualitative research methods, especially within the library field, and demonstrated a high level of competency in rigorously conducting this evaluation.

The report and evaluation requirements as stated in the guidelines outlined in IMLS-CLR-D-0019 was used as a significant part of the evaluation framework. Prior to the start of the evaluation, three guiding documents were created to ensure a valid and reliable process was conducted – Montana LSTA evaluation plan ([see Appendix D1](#)), evaluation crosswalk ([see Appendix D2](#)), and evaluation logic model ([see Appendix D3](#)). These three documents served as the foundation for the evaluation and helped ensure that all guidelines and required questions to be answered by the evaluation were identified and accounted for in the evaluation design and evaluation instruments. All evaluation protocol including interview and focus group questions, surveys, and site visits were planned, developed, and aligned to the evaluation requirements to ensure the evaluation and its findings were valid and reliable. The State Library reviewed and approved the plan, crosswalk, logic model, and drafts of all instruments prior to implementation.

**C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.**

The evaluation used a mixed-method qualitative and quantitative approach. The use of an evaluation plan and evaluation crosswalk helped establish strong internal validity and reliability by ensuring all IMLS evaluation and report guidelines, Montana’s 2013-2017 LSTA goals<sup>9</sup>, and prior recommendations from Montana’s 2008-2012 evaluation<sup>10</sup> were identified, documented, and accounted for in both the design and implementation of the evaluation and all associated instruments and protocol.

Qualitative methods included gathering all available SPRs, relevant statistical data, interviews with the State Librarian and LSTA administrator, focus groups with other MSL staff, the Network Advisory Council, State Library Commission, focus groups with Montana librarians and patrons, online surveys for staff, librarians, and patrons, and two site visits including visiting selected libraries in central and western Montana. Questions were also asked using Montana State Library’s social media but no responses were received. Thematic analysis was used to review and categorize interview and focus group responses and anonymity and confidentiality of the participants were protected and secured. Open-ended survey responses were also coded, categorized, and collapsed into common themes. See the following appendices for original instruments used:

- [Appendix D4 –Staff Interview/Focus Group Questions](#)
- [Appendix D5 – NAC and Library Commission Focus Group Questions](#)
- [Appendix D6 – Librarian and Patron Interview/Focus Group Questions](#)
- [Appendix D7 – Montana State Library LSTA Five-Year \(2013-2017\) Survey](#)

Specific quotes were also used to supplement quantitative data and provide richer context to the findings.

Quantitative methods included several levels of data analysis. The preliminary level of analysis used basic descriptive statistics including frequencies, percentages, sums, and means when analyzing SPR data and the logic model ([See Appendix E1](#)), survey responses ([See Appendix E2](#)). The second level introduced basic correlations (Pearson R coefficient) ([See Appendix E4](#)), analysis of variance (ANOVA), and linear regression to identify statistically significant

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<sup>9</sup> Montana Five-Year Plan 2013-2017, <https://www.imls.gov/sites/default/files/state-profiles/plans/montana5yearplan.pdf>

<sup>10</sup> LSTA in Montana – 2008-2012 Five-Year LSTA Evaluation, [http://msl.mt.gov/library\\_development/Grants/LSTAEvaluation.pdf](http://msl.mt.gov/library_development/Grants/LSTAEvaluation.pdf)

relationships and differences in Montana’s public library statistics over a 10-year period and demographic trends in survey responses ([See Appendix E3](#)).

Collectively, this evaluation and findings have strong internal and external validity and reliability through the use of data triangulation, which examined Montana’s progress towards attaining its 2013-2017 five-year goals using a diverse set of data, methods, and stakeholder perspectives.

**C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them.**

The evaluation’s target sampling frame focused on seeking input from major stakeholders, which included meeting with state library staff responsible for Montana’s LSTA program, their Network Advisory Committee, State Library Commission, librarians, and patrons.

The total sample for the evaluation was 253 participants. This included interviews (n=5), focus groups (six focus groups, n=23), four site visits spanning five days in Montana (four different libraries were visited), and a community wide survey administered to the general public (N=161) and also mailed to a random sample (N=54).

The table below shows the breakdown of stakeholders that completed the survey.

*Table 78 - Survey Participants*

**Montana State Library Five-Year LSTA Evaluation Survey**

Your Primary Status (choose the answer choice that best describes you):		
Answer Options	Response Percent	Response Count
State Library Staff	5.1%	11
Librarian or Library Staff	43.3%	93
Library Administrator	14.4%	31
Patron or General Community Member	30.7%	66
Network Advisory Council member	0.5%	1
State Library Commission member	1.4%	3
Public Library Trustee	4.7%	10
<i>answered question</i>		<b>215</b>

[See Appendix B](#) for full list of all evaluation participants.

*Random Sampling*

The State Library randomly selected 100 Montana residents from each of the Six Federations. 600 print surveys were mailed and 54 completed surveys were returned, which is a 9% response

rate. Random sampling allows for increased validity and reliability as the 54 responses can be considered representative of typical Montana residents.

Participants represented all six State Library Federations per the Figure below.

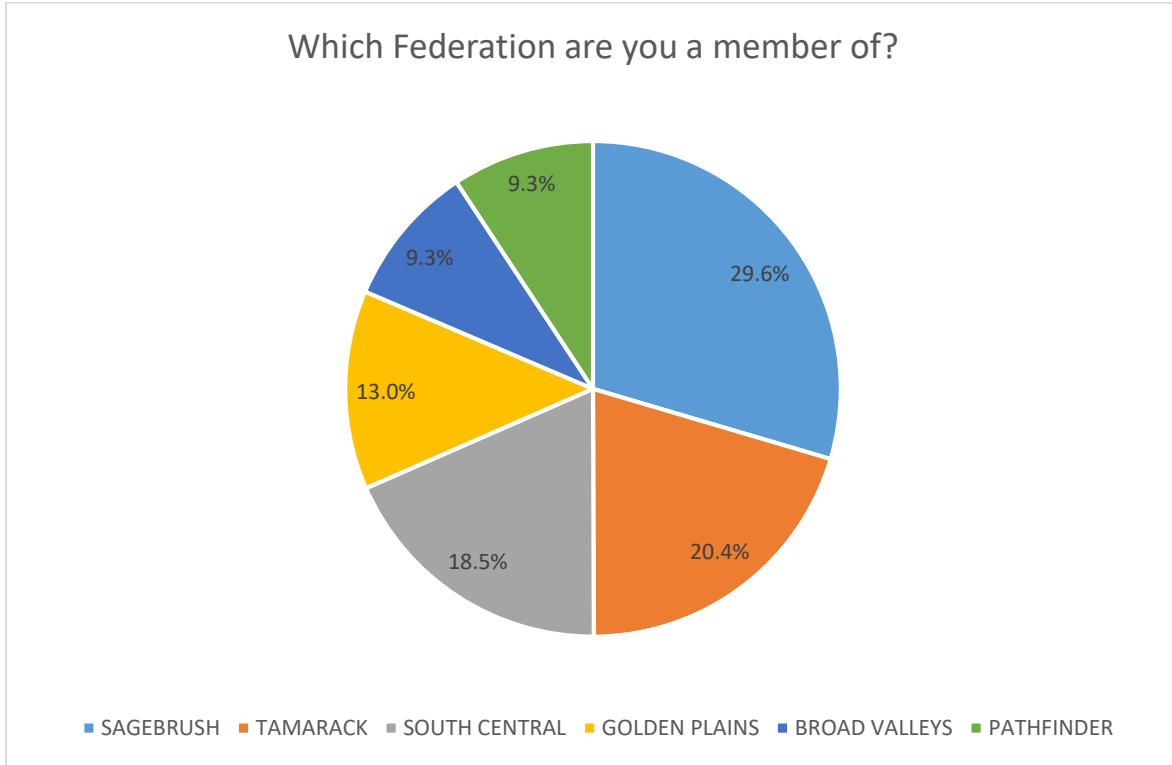


Figure 12 - Random Sample (Federations)

**C-4. Discuss how you will share the key findings and recommendations with others.**

Two evaluation reports have been generated – one full report to the Montana State Library which exceeds the IMLS page limit and a smaller report submitted to IMLS within following its established guidelines and page requirements. The reports submitted to IMLS will be shared on the MSL website and widely disseminated across the state. In addition, the major results of the evaluation will also be shared using a dissemination website.

**VI. Future 2018-2022 Priorities: Staff, Librarian, and Patron Perspectives**

As part of the evaluation, all participants were also asked to identify future Montana library priorities by IMLS priority, Focal Group, Focal Area, and also open ended responses.



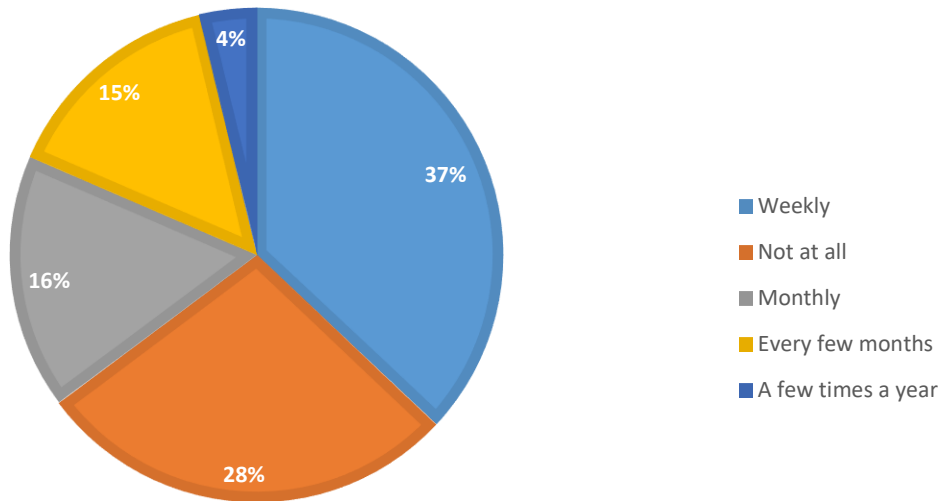
## Demographics of Randomly Sampled Montana Residents

### Library Usage

Think about the past 12 months. In a typical month, approximately how often did you visit or use in any way (in person, online, and/or service) a library?

Answer Options	Response Percent	Response Count
Weekly	37.0%	20
Not at all	27.8%	15
Monthly	16.7%	9
Every few months	14.8%	8
A few times a year	3.7%	2

APPROXIMATELY HOW OFTEN DID YOU VISIT OR USE IN ANY WAY (IN PERSON, ONLINE, AND/OR SERVICE) A LIBRARY IN THE PAST 12 MONTHS?



Select random sample comments:

- Libraries are being supplanted by relatively ready/accessible internet connections.
- Often more than once a week
- I don't read much.
- can download books online
- 2x month
- no need
- Every 2 weeks
- member of library board.
- Web MD

- Every 2 weeks. I visit to check out books for leisure reading.
- We live 15 miles from town and actually just don't read much.
- Have a local library in my retirement home
- I like to check out audiobooks.
- sources available online at home
- Live way in the country.
- My eyesight is very limited. I do not use the library at all. In past both my husband and I did use it regularly.
- Fiction
- No need
- Much of the information is available on the internet
- Just check out books.
- Majority of my required information comes from internet/ipad.
- I download books - audio - to listen to on my ipad. I also check out books from our local library.
- Not open on weekends.
- Order books off Amazon
- It is not easy for us to visit since we live out of town.
- 5 or more visits per month. I use the public library, but now that I am in school at MSU-B I am in the library on campus at least a couple times a week.

**IMLS Priorities for 2018-2022**

The patron random sample of Montana residents (both users and non-users) identified IMLS Priority 1, 8, 3, 2, and 7 as their highest priorities.

*Table 79 - Patron Random Sample Future IMLS Priorities*

<b>To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?</b>		
<b>Answer Options</b>	<b>Rating Average</b>	<b>Response Count</b>
#1 - Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	5.40	47
#8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	5.33	48
#3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	5.30	46
#2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	5.08	48
#7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved	5.00	47

#4 -Enhance efforts to recruit future professionals to the field of library and information services	4.76	45
#6 - Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	4.57	46
#5 - Develop public and private partnerships with other agencies and community-based organizations	4.46	46

To get a clearer understanding on whether there were differences between stakeholders, the data was broken down in four different participant groups – staff, SLC/NAC members, librarians, and patron random sample. The table below shows the ranking of different stakeholders by IMLS priority.

<b>To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?</b>					
<b>Answer Options</b>	<b>Staff Rank (n=7)</b>	<b>SLC and NAC Rank (n=4)</b>	<b>Librarian Rank (n=90)</b>	<b>Patron Random Sample Rank (n=47)</b>	<b>Average Rank</b>
#1 - Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	3	1	1	1	1.5
#2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	6	2	3	4	3.75
#3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	2	3	2	3	2.5
#4 -Enhance efforts to recruit future professionals to the field of library and information services	8	8	8	6	7.5
#5 - Develop public and private partnerships with other agencies and community-based organizations	4	4	7	8	5.75
#6 - Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	7	6	6	7	6.5
#7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved	5	7	5	5	5.5
#8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	1	5	4	2	3

Next a composite ranking, an average of all rankings, was taken illustrating some degree of consensus among the top three future priorities – IMLS Priority 1 (Expand service for learning and access to information and educational resources), IMLS Priority 3 (Provide training and professional development), and IMLS Priority 8 (Develop library services that provide all users access to information). IMLS Priority 2 (Establish and enhance electronic and other linkages) and IMLS Priority 5 (Develop public and private partnerships) had some disagreement and are highlighted in the table below.

<b>To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?</b>						
<b>Answer Options</b>	<b>Staff Rank (n=7)</b>	<b>SLC and NAC Rank (n=4)</b>	<b>Librarian Rank (n=90)</b>	<b>Patron Random Sample Rank (n=47)</b>	<b>Average Rank</b>	<b>Composite Rank</b>
#1 - Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	3	1	1	1	1.5	1
#3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	2	3	2	3	2.5	2
#8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	1	5	4	2	3	3
#2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	6	2	3	4	3.75	4
#7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved	5	7	5	5	5.5	5
#5 - Develop public and private partnerships with other agencies and community-based organizations	4	4	7	8	5.75	6
#6 - Target library services to individuals of diverse geographic, cultural, and socioeconomic	7	6	6	7	6.5	7

backgrounds, and to individuals with limited functional literacy or information skills						
#4 -Enhance efforts to recruit future professionals to the field of library and information services	8	8	8	6	7.5	8

In the aggregate, combining all participants together, over 150 staff, librarians, and patrons rated each of the IMLS priorities. The top four IMLS priorities based on the averages of all participants were the same as the composite rankings - IMLS Priority #1 (Expand services for learning and access to information and educational resources in a variety of formats), #3 (Provide training and professional development...), #2 (Establish or enhance electronic and other linkages and improved coordination among and between libraries), and #8 (Develop library services that provide all users access to information).

Table 80 - IMLS Priorities for 2018-2022

To what extent do you feel the following national priorities should represent a substantial focus of Montana's libraries over the next five years?		
Answer Options	Rating Average	Response Count
#1. Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills	5.99	158
#3. Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services	5.90	157
#2. Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services	5.74	159
#8. Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks	5.65	158
#7. Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved	5.46	157
#6. Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills	5.22	156
#5. Develop public and private partnerships with other agencies and community-based organizations	5.09	153
#4. Enhance efforts to recruit future professionals to the field of library and information services	4.93	155
Average	5.50	

Select staff, librarian, and patron comments on the future importance of IMLS priorities 1 and 2:

#1 (ranked the highest future priority) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills

#2 (ranked the third highest future priority) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services

- Please consider offering tutor.com again! My students and their parents miss it! Even if it is not available to all libraries, I would direct my patrons to the public library so that they can use it.
- Living in a rural area, we do not have other access to education, workforce development, etc. The library is an essential resource for community members.

The more our libraries are connected, the better access for our patrons.

- Making sure that services that work are available to all is important. Resource sharing is necessary in our state in order to improve the quality of and access to library information.
- There are currently SO MANY resources available for us to use and show the public, but we, as a library system, are not getting it out there and we are not working with the proper connections. We are a library system, but maybe it's time we start thinking commercially, with marketers, such as big businesses do. We will not lose the integrity of being a "Library" and all that image entails, but it's time we learn how to show people, that a "Library" can move along WITH the times-and maybe show them a bit before the times in some cases, and not be behind the times. Not just in programing, but in the resources we already have.
- databases are too expensive for any one library to sustain a subscription over time. without subscription database access a great deal of info is inaccessible to the general public without having to pay on a case-by-case bits & pieces basis that can add up very quickly and strain personal resources. restoring funding for more database access would help patrons more directly than improving connectivity. "Electronic linkages" ie backbone connectivity and higher-bandwidth connections for towns and residences are not really within the purview of the state library anyway. Improved coordination is a pipe dream - everyone pays lip service but no one ever listens anyway, so why waste the money?
- I do not believe that rural communities will receive the same quality of services as urban communities if more services are streamlined at the state level.
- Funding inequities across the state have been subsidized by grants, friend of library organizations, PTA's, etc. Equalization of access and resource equity is fundamental to our learners of all ages.
- Montana is generally behind the rest of the nation in terms of reliable connectivity. Also, due to a high percentage of poverty, many Montanans do not have household access to computers or internet.

Select staff, librarian, and patron comments on the future importance of IMLS priorities 3-5:

#3. (ranked the second future highest priority) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services

#4. (ranked the eighth and last future highest priority) Enhance efforts to recruit future professionals to the field of library and information services

#5. (ranked the seventh and second to last future highest priority) Develop public and private partnerships with other agencies and community-based organizations

- Recruitment should be easier if librarians are provided the professional development they need in order to delivery library services.
- The last one (#5) is highly needed and very lacking
- It is not possible to recruit future library professionals when the current professionals are not valued financially. Professionals (many with a Master's degree) should earn a professional salary.
- There is no need to recruit more people to the field. There are plenty of people looking for jobs in the LIS field. Unfortunately what needs to be addressed are the extremely low salaries offered in Montana for jobs that require years of experience and education. If salaries were higher and the field more respected there would be no problem filling positions.
- There might be enough librarians in MT right now - the Occupational Outlook Handbook predicts a very small increase in job opportunities. That could change though, so that's an important one to watch to make sure that need gets met again.
- I know many people who have struggled in order to find full time employment in the field. In my graduating class many spirited, community driven people who had hoped to make a difference in libraries went on to work for corporate entities after finding a lack of opportunities in public libraries. If something wonderful occurred that gave libraries the means to expand their services and create more full time positions, there would be qualified people interested in those jobs.
- Important to build community partnerships to help us identify needs of our community members and to earn their trust as we invest monies in library services to serve our library populations.
- Interested candidates should be encouraged and assisted financially in their quest for advanced professional development - especially if they are already valued, successful clerical or para-professional staff in a Library open to the public.
- Montana libraries need more professionals!

Select staff, librarian, and patron comments on the future importance of IMLS priorities 6-8:

#6. (ranked the sixth future highest priority) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills

#7. (ranked the fifth future highest priority) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved

#8. (ranked the fourth future highest priority) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks

- Why would you limit it to below the poverty line? Target everyone to take advantage of one of the best things in the USA - our libraries!! Our librarians are fantastic, already up to speed with helping users tech skills.
- School libraries can go a long way in meeting these goals in the rural areas.
- national policies get lost, it's the state and locals that should take care of library services.
- I want to emphasize that first come first serve is (weighted) towards higher populated areas. It is just simple math. When our services our (weighted) that way, those of us in rural areas receive less services, yet our constituents pay taxes for those services. I am concerned that these people will become frustrated with this issue and start to devalue small and medium public libraries.

- I understand that The Queens' Public Library, of The New York City Public Library system, serves a(n) area with over 60 native fluency languages among its Patrons, and has Staff with native fluency in over 30 of those languages (and materials in many of them): That's Progress!
- Our community is predominantly low- to middle-income families and individuals. The library would like to be more (or continue to be) relevant to their needs.

### Future IMLS Focal Area Priorities for 2018-2022

The randomly sampled patrons selected its top Focal Area Priorities as Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Civic Engagement (Focal Area 6), and Human Services (Focal Area 5).

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?			
Answer Options	Rating Average	Response Count	Rank
<b>2. Information Access</b>	6.08	51	1
<b>1. Lifelong Learning</b>	5.88	51	2
2.2. Improve users' ability to obtain and/or use information resources	5.73	51	3
2.1. Improve users' ability to discover information resources	5.69	51	4
1.2. Improve users' general knowledge and skills	5.56	50	5
6.1. Improve users' ability to participate in their community	5.45	44	6
6.2. Improve users' ability to participate in community conversations around topics of concern.	5.32	44	7
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	5.31	42	8
<b>6. Civic Engagement</b>	5.26	34	9
5.3. Improve users' ability to apply information that furthers their parenting and family skills	5.21	42	10
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	5.14	42	11
4.2. Improve users' ability to use and apply business resources	4.94	47	12
<b>5. Human Services</b>	4.92	38	13
4.1. Improve users' ability to use resources and apply information for employment support	4.83	47	14
1.1. Improve users' formal education	4.78	49	15
3.1. Improve the library workforce	4.72	46	16
3.2. Improve the library's physical and technological infrastructure	4.65	46	17
4. Economic & Employment Development	4.61	44	18
3.3. Improve library operations	4.56	45	19
3. Institutional Capacity	4.43	40	20



The composite rank was calculated based on the average ranking of each Focal Area by all stakeholders. The top four Focal Areas included Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Institutional Capacity (Focal Area 3), and Human Services (Focal Area 5). Areas of major disagreement were shaded for emphasis and Civic Engagement (Focal Area 6) were ranked much higher by SLC/NAC members and patrons than State Library staff or librarians.

Table 81 – Composite Future Focal Area Rankings

Answer Options	Staff Rank (n=7)	SLC/NAC Rank (n=4)	Librarian Rank (n=86)	Patron Random Sample Rank (n=45)	Average Rank	Composite Rank
<b>2. Information Access</b>	1	2	1	1	1.25	1
2.2. Improve users' ability to obtain and/or use information resources	2	4	2	3	2.75	2
1.2. Improve users' general knowledge and skills	4	1	6	5	4	3
2.1. Improve users' ability to discover information resources	9	3	3	4	4.75	4
<b>1. Lifelong Learning</b>	3	13	4	2	5.5	5
3.2. Improve the library's physical and technological infrastructure	5	5	5	17	8	6
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	6	11	11	8	9	7
3.1. Improve the library workforce	7	7	7	16	9.25	8
6.1. Improve users' ability to participate in their community	19	6	10	6	10.25	9
5.3. Improve users' ability to apply information that furthers their parenting and family skills	8	12	12	10	10.5	10
<b>6. Civic Engagement</b>	18	9	13	9	12.25	11
3.3. Improve library operations	10	15	9	19	13.25	12
<b>4. Economic &amp; Employment Development</b>	11	8	18	18	13.75	13
6.2. Improve users' ability to participate in community conversations around topics of concern.	16	18	15	7	14	14
<b>3. Institutional Capacity</b>	15	14	8	20	14.25	15
4.2. Improve users' ability to use and apply business resources	17	10	19	12	14.5	16
<b>5. Human Services</b>	13	16	16	13	14.5	17
4.1. Improve users' ability to use resources and apply information for employment support	12	19	14	14	14.75	18
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	14	17	17	11	14.75	19

1.1. Improve users' formal education	20	20	20	15	18.75	20
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In the aggregate and based on average ranking of all survey participants, the top four shifted slightly to Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Institutional Capacity (Focal Area 3), and Civic Engagement (Focal Area 6).

Table 82 - Future Focal Area Average Ratings

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?			
Answer Options	Rating Average	Response Count	Rank
<b>2. Information Access</b>	6.20	158	1
2.2. Improve users' ability to obtain and/or use information resources	6.05	157	2
2.1. Improve users' ability to discover information resources	5.93	158	3
<b>1. Lifelong Learning</b>	5.89	156	4
1.2. Improve users' general knowledge and skills	5.71	158	5
3.2. Improve the library's physical and technological infrastructure	5.49	155	6
6.1. Improve users' ability to participate in their community	5.48	151	7
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	5.43	150	8
5.3. Improve users' ability to apply information that furthers their parenting and family skills	5.42	149	9
6.2. Improve users' ability to participate in community conversations around topics of concern.	5.41	150	10
<b>6. Civic Engagement</b>	5.40	134	11
3.1. Improve the library workforce	5.37	154	12
3.3. Improve library operations	5.31	154	13
<b>5. Human Services</b>	5.28	138	14
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	5.26	149	15
4.1. Improve users' ability to use resources and apply information for employment support	5.24	156	16
<b>3. Institutional Capacity</b>	5.23	141	17
4.2. Improve users' ability to use and apply business resources	5.12	155	18
<b>4. Economic &amp; Employment Development</b>	5.03	147	19
1.1. Improve users' formal education	4.89	155	20
Average	5.46		

Focus groups with a diverse group of Montana Library directors, however, suggested different priorities focused most frequently on a top three of **Institutional Capacity** (Focal Area 3, selected 10 times as a top three priority), **Information Access** (Focal Area 2, selected 9 times as a top three priority), and **Economic & Employment Development** (Focal Area 1, selected 8 times as a top three priority).

Select focus group comments:

**Focal Area 3: Institutional Capacity (MSL Goals 1, 3) (10 votes)**

- 3.3. Improve library operations is essential.
- Rated #3 for both Billings and Harlem, and #2 for another library system.
- Another librarian from a librarian standpoint, “when I attend our state library conference – it’s a great place to exchange information; a lot of people do not know about the rules and standards for cataloging – anything we can do to increase skillsets” (Focus Group Participant, October 2016).

**Focal Area 2: Information Access (MSL Goals 2, 3, 4) (9 votes)**

- Both ways - give information to users, provide our state’s information to the world
- For Billings this is #1 - such a large rural population in our state
- Harlem #2
- #1 for another library system

**Focal Area 4: Economic & Employment Development (8 votes)**

- -#2 for Billings

**Focal Area 1: Lifelong Learning (MSL Goal 3) (7 votes)**

**Focal Area 5: Human Services (6 votes)**

- #1 for Harlem
- #3 for another system

**Focal Area 6: Civic Engagement (5 votes)**

- #6 Civic engagement – library users have a tendency to be very quiet; not the ones to go to City Hall to express how important libraries are; Training on how to do this, less intimidating; very rarely are their patrons from the communities attend the hearings – The SL came to my board of trustees retreat – morning session on advocacy at the board level. Making yourself known with everyone.

Select staff, librarian, and participant comments on Focal Area 1:

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?									
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
1. Lifelong Learning	3	1	6	13	25	37	71	5.89	156
1.1. Improve users' formal education	9	6	14	35	29	24	38	4.89	155
1.2. Improve users' general knowledge and skills	4	0	7	17	24	53	53	5.71	158

- Rural areas do not have other access.

- Not sure what these meant. How to improve users' general knowledge and skills is not addressed and so the questions do not have much meaning.
- Goes without saying
- I am not sure how our library would do either of the specific improvements listed.
- YOUTH SERVICES!

Select staff, librarian, and participant comments on Focal Area 2:

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?									
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
2. Information Access	2	1	3	8	18	38	88	6.20	158
2.1. Improve users' ability to discover information resources	3	3	1	9	33	39	70	5.93	158
2.2. Improve users' ability to obtain and/or use information resources	3	1	1	9	24	47	72	6.05	157

- Many people know how to discover information, but do not know how to evaluate or use them in a meaningful way.
- Improve the resources and access to them
- Patrons must feel welcome and comfortable using all - including online - resources. Youth must be actively encouraged and mentored onsite.

Select staff, librarian, and participant comments on Focal Area 3:

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?									
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
3. Institutional Capacity	7	8	2	18	36	33	37	5.23	141
3.1. Improve the library workforce	8	5	7	16	30	42	46	5.37	154
3.2. Improve the library's physical and technological infrastructure	6	5	4	21	25	44	50	5.49	155
3.3. Improve library operations	6	8	4	21	34	38	43	5.31	154

- Improvement is always a good thing.
- Many Montana libraries have one professional librarian and a staff of part-time, high school educated staff in an effort to save money. This practice does not display the value of a professional librarian. In addition, with this structure, the library director should really have a management degree instead of a library services degree.
- We would love to be open more hours and have more space.
- Clerical, Para-Professional and Professional Staff Members should be able to imagine a Career Progression Path - even if it assumes continuing at a different Library/institution.

Select staff, librarian, and participant comments on Focal Area 4:

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?									
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
4. Economic & Employment Development	5	5	7	41	28	28	33	5.03	147
4.1. Improve users' ability to use resources and apply information for employment support	6	2	6	36	33	31	42	5.24	156
4.2. Improve users' ability to use and apply business resources	7	2	6	38	36	30	36	5.12	155

- There are other agencies in most communities that provide these important services.
- Good ideas for improvement if these services are not provided elsewhere.
- Libraries can't do it all
- Libraries can partner with local Job Services but do not (n)eed to take on their mission.
- Community-appreciated business support is valuable.
- I believe there are already organizations in place that specialize in this issue.

Select staff, librarian, and participant comments on Focal Area 5:

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?									
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
5. Human Services	5	3	9	22	30	31	38	5.28	138
5.1. Improve users' ability to apply information that furthers their personal, family, or household finances	3	4	11	23	40	29	39	5.26	149
5.2. Improve users' ability to apply information that furthers their personal or family health & wellness	3	2	9	25	33	30	48	5.43	150
5.3. Improve users' ability to apply information that furthers their parenting and family skills	5	5	6	23	25	38	47	5.42	149

- There are other agencies in most communities that focus on these important services.
- Libraries can't do it all.
- There are state a federal resources for this but do not need to be the library's primary mission.
- Youth Services through Parents is most worthwhile.

- Our community and library patronage is comprised largely of families that would benefit from access to this kind of information.

Select staff, librarian, and participant comments on Focal Area 6:

Which of the following Measuring Success national priority areas should be a priority for Montana's libraries over the next five years?									
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	Rating Average	Response Count
6. Civic Engagement	5	1	6	25	22	36	39	5.40	134
6.1. Improve users' ability to participate in their community	4	1	6	24	30	44	42	5.48	151
6.2. Improve users' ability to participate in community conversations around topics of concern.	4	3	7	20	35	41	40	5.41	150

- Libraries should be the center of any community. They provide the highest civic service.
- I'm not sure this is the library's job. All librarians can guide you already to the resources, but for them to be teachers to anything besides getting on the computers is best left to our public school which should implement adult classes!
- I feel that whoever is using the library, knowledge is being acquired naturally.
- There are other agencies in most communities that focus on these important services.
- This is a good goal but not sure how it is going to be implemented.
- Provide neutral ground for community conversations.
- The availability of a dedicated, comfortable Public Meeting Space with modern technical services helps all program goals.

### Focal Group Future Priorities

The patron random sample identified their future top six focal groups as school-aged youth (6-17), families, children (0-5), individuals with functional literacy, individuals with disabilities, and the library workforce.

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?			
Answer Options	Rating Average	Response Count	Rank
School-aged youth (aged 6-17)	6.04	47	1
Families	5.89	47	2
Children (aged 0-5)	5.58	45	3
Individuals with limited functional literacy or information skills	5.57	47	4
Individuals with disabilities	5.43	47	5
Library workforce (current and future)	5.27	46	6
Individuals that are unemployed/underemployed	5.12	46	7
Individuals living below the poverty line	5.09	47	8
Ethnic or minority populations	4.63	47	9
Immigrants/refugees	4.07	47	10
Average	5.27		

Composite rankings of all stakeholders identified the top five focal group priorities as school-aged children (6-17), individuals with limited functional literacy or information skills, families, library workforce, and individuals with disabilities.

<b>To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?</b>						
<b>Answer Options</b>	<b>Staff Rank (n=7)</b>	<b>SLC and NAC (n=4)</b>	<b>Librarian Rank (n=85)</b>	<b>Patron Random Sample Rank (n=47)</b>	<b>Average Rankings</b>	<b>Rankings</b>
School-aged youth (aged 6-17)	5	2	1	1	2.3	1
Individuals with limited functional literacy or information skills	2	1	5	4	3.0	2
Families	8	2	2	2	3.5	3
Library workforce (current and future)	3	2	4	6	3.8	4
Individuals with disabilities	1	2	7	5	3.8	4
Children (aged 0-5)	9	2	3	3	4.3	6
Individuals living below the poverty line	4	2	6	8	5.0	7
Ethnic or minority populations	6	2	9	9	6.5	8
Individuals that are unemployed/underemployed	10	2	8	7	6.8	9
Immigrants/refugees	7	10	10	10	9.3	10

Aggregate ratings of all stakeholder responses, however, which provides more weight to the librarian perspective because of their higher numbers of participation, had a top five of school-aged youth (6-17), families, children (0-5), individuals with limited functional literacy or information, and library workforce.

<b>To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?</b>		
<b>Answer Options</b>	<b>Rating Average</b>	<b>Response Count</b>
1. School-aged youth (aged 6-17)	6.16	152
2. Families	6.01	153
3. Children (aged 0-5)	5.95	151
4. Individuals with limited functional literacy or information skills	5.73	151
5. Library workforce (current and future)	5.62	151
6. Individuals with disabilities	5.53	153
7. Individuals living below the poverty line	5.46	154
8. Individuals that are unemployed/underemployed	5.36	152
9. Ethnic or minority populations	5.03	153
10. Immigrants/refugees	4.52	152
	5.54	

Focus groups with library directors supported a focus on children and families, and recommended future focal group priorities as: Children (aged 0-5) (5 votes); School-aged youth (aged 6-17)

(5 votes); Families (4 votes), as one focus group participant noted, “a good experience and helps start the cycle” for a lifetime; Library workforce (current and future) (4 votes), one participant noted, “maintaining and encouraging new people coming into the workforce” was essential; and Individuals with disabilities (4 votes).

Select comments for specific focal groups:

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?										
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	N/A	Rating Average	Response Count
Library workforce (current and future)	2	3	7	19	23	36	51	10	5.62	151
Individuals living below the poverty line	3	2	10	18	35	34	45	7	5.46	154
Individuals that are unemployed/underemployed	3	4	9	20	39	27	44	6	5.36	152

- Libraries should serve all peoples.
- Serve all not just some
- Partnerships are critical to successfully delivering services with this focus.
- No one should feel unwelcome - even properly behaving so-called "Asphalt Rats" should be afforded full services - just as are sightless and hearing-impaired and otherwise physically challenged Patrons.

To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?										
Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	N/A	Rating Average	Response Count
Ethnic or minority populations	6	7	11	23	38	21	37	10	5.03	153
Immigrants/refugees	13	9	15	34	25	19	28	9	4.52	152
Individuals with disabilities	3	3	7	16	35	37	46	6	5.53	153

- The library should serve all citizens.
- There are few immigrants/refugees or ethnic populations in our county.
- The world is becoming more diverse, at the same time more challenging. While Montana has historically been viewed as homogeneous, in the future this will become more untrue. That is to say, Montana will become more diverse in the future. I believed libraries should embrace and meet that fact.
- I do not like taxpayers' funds being targeted to serve anything other than all people because in recent decades the taxpayers ended up being those most unserved. Resources requested/needed by the average middle class person are very often simply not available.
- These would be ranked higher if they were a more significant population in Montana or if this was a ranking for national libraries. Since these are such small groups in Montana, they deserve representation, but only in relation to their presence in our communities. Likewise, if Montana saw an increase in its refugee or minority populations, then focus should be changed accordingly.



- We don't serve immigrants/refugees or ethnic/minority populations at our library. We do serve some individuals with disabilities.
- Libraries should be a welcoming and helpful place to all demographics.
- In conjunction with the state and federal agencies working with these groups the library may have a role but not necessarily a primary focus.
- Almost all of these Patrons are taxpayers.
- I do feel that by labeling people and putting them into categories such as these only creates disconnect and contempt for one another. I feel people should be treated as EQUALS all across the board....by race, economic status, nationality, sexual preference etc.....
- I feel that people should be treated as equals, regardless of ethnicity, abilities, or financial situations. Creating separate programs and focusing on just one group causes a greater divide among peoples.

**To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?**

Answer Options	1 (low priority)	2	3	4	5	6	7 (high priority)	N/A	Rating Average	Response Count
Individuals with limited functional literacy or information skills	2	2	5	13	37	34	56	2	5.73	151
Families	2	1	0	9	31	40	64	6	6.01	153
Children (aged 0-5)	3	2	2	13	22	35	69	5	5.95	151
School-aged youth (aged 6-17)	2	1	2	4	24	40	75	4	6.16	152

- Immigrants (especially Mexicans) need to be able to speak English to obtain citizenship. Someone is going to have to pick up this ball. Again - our Public Schools should be doing this! Check out Colstrip's offerings.
- Libraries should operate as they originally were established to operate, based on the principle of serving all patrons equally. Therein is where their focus and priority should lie.
- Children in general should be the priority - no matter what ethnic background, ability or disability. Make them love books early so they put down the electronic devices. Digital books are handy but everyone should love the feeling of reading a book.
- It's essential to start with infants and families in serving our communities.
- Early childhood education and school age youth should represent a substantial focus and these groups would include families and individuals with limited functional skills.
- ALL groups - even the "average" citizen - need to be a focus for libraries - meeting the needs of any individual group is not equal service. Making sure all groups are reached is a challenge, but necessary.
- Again, can't be all things to all people. Librarians are not social workers although some are teachers.
- I'm surprised seniors were not identified as a group. Since this is the largest growing segment of the population, I believe we would be remiss not to focus on their needs.
- Yes.
- Again, I feel that all people should be treated as EQUALS. Every living breathing individual deserves library services on an equal level and we should focus on that....not the specific demographic.

**Final Comments about the State Library and its services**

- Commend them about the job that they are doing; helping us help our communities
- With all of our challenges and diversity across the state – with the structure and the LC and NAC and other administrative cooperation that goes on and be so transparent and honest is outstanding. They are doing a stellar job and they fight for us.
- This is the first profession where people at the top actually know my name – I commend them for that; other professions I had that has never happened. They truly care about all the libraries.
- We are a huge family and they do such a great job.
- They know us and have a pulse is what is going on.
- I would not have an online catalog without it!
- I personally appreciate the opportunities.

#### Academic libraries

- Academic Libraries (Montana Tech) – funding, we are very lucky that we are an affiliate; funding at our institution is adequate but there are resources (engineering library and heavy science); items that I simply cannot afford – the state does not support higher ed.
- Physical infrastructure needs a lot of upgrades (built in 1972); temperature control and water fountains; the School supports us but the State in general; our technology is very good (all the hardware and software) and good IT support. Sufficient but not ideal.
- Did a weeding project seven years ago – our circulation numbers are robust (do more electronic); technical nature of our resources; journal collection is weeded constantly – larger area for collaboration and study rooms
- Similar for UM – funding and being able to maintain our resources – cuts every year the last two or three years; collections development is diminishing; this past year are personnel cuts; the State
- Fairly old building (1970’s) – some maintenance over the year; lots of things that could be improved; air quality; probably about the same across the campus; adequate with the technology and better than some places in campus (adequate to good).
- We are pretty similar – increased usage; no weeding projects; a need for creating more usage spaces; fair number of collaborative spaces for students to use; more quiet areas

## Patron Information and Entertainment Priorities

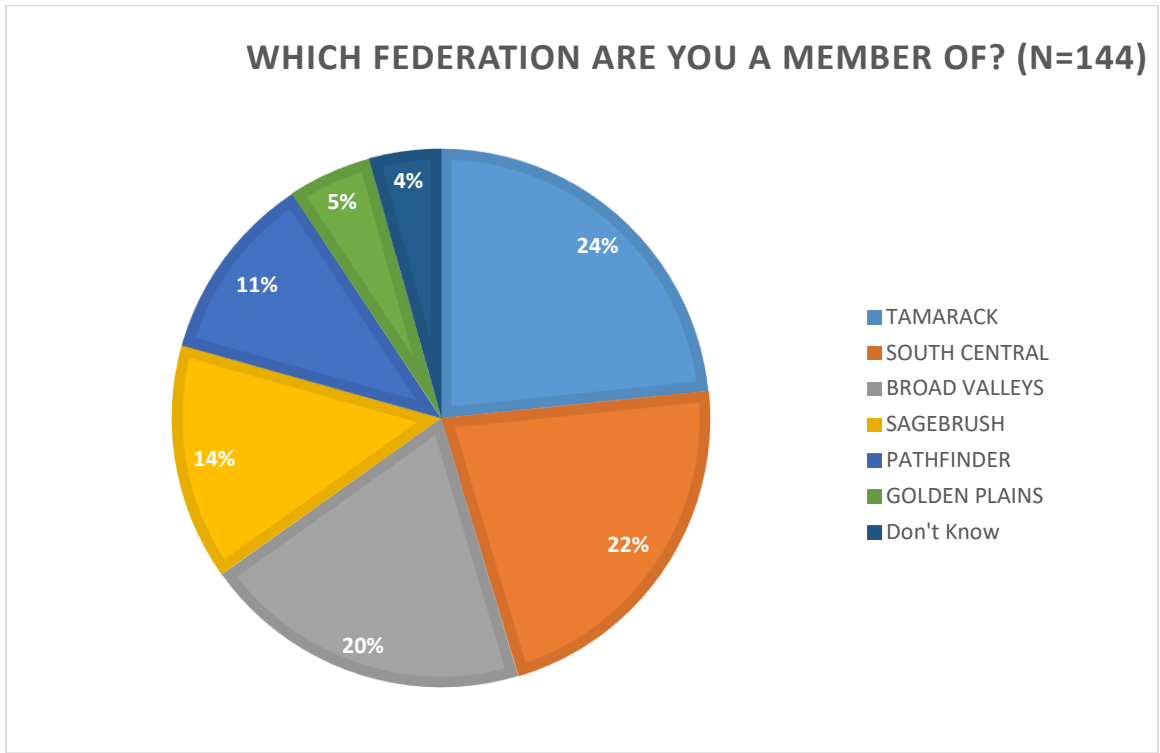
The final data point for this evaluation was understanding the general information needs and sources, entertainment priorities, and highest priority library services and sources.

Data will be presented in the aggregate, by staff and librarian, and by random sample only to illustrate any potential differences in perception.

### *Demographics*

#### Federations

All federations were represented in the study with relatively good representation from east and western ends of the state – 24% was from Tamarack, 23% from South Central, 20% from Broad Valleys, and 14% from Sagebrush.



**Frequency of Use**

In the aggregate, the majority of participants used the library on a weekly basis.

**Montana State Library Five-Year LSTA Evaluation Survey**

Think about the past 12 months. In a typical month, approximately how often did you visit or use in any way (in person, online, and/or service) a library?

Answer Options	Response Percent	Response Count
Daily	29.0%	49
Weekly	42.6%	72
Monthly	11.2%	19
Every few months	7.1%	12
A few times a year	1.2%	2

For the patron random sample, the majority also were also weekly users followed closely by non-users.

Think about the past 12 months. In a typical month, approximately how often did you visit or use in any way (in person, online, and/or service) a library?

Answer Options	Response Percent	Response Count
Weekly	37.0%	20
Not at all	27.8%	15
Monthly	16.7%	9
Every few months	14.8%	8
A few times a year	3.7%	2

### Travel time to the library

As found in work with other states and throughout North Carolina, library users tend to be within 20 minutes of the library they use. Approximately 90% of the participants were 20 minutes or closer with 60% being within 10 minutes. Online access is also another variable now.

### Montana State Library Five-Year LSTA Evaluation Survey

How long does it usually take you to travel to visit the library you most often use?

Answer Options	Response Percent	Response Count
0-5 minutes	28.7%	31
5-10 minutes	29.6%	32
10-15 minutes	17.6%	19
15-20 minutes	13.0%	14
More than 20 minutes	7.4%	8
Other (please specify) or please feel free to elaborate:	3.7%	4
<i>answered question</i>		<b>108</b>
<i>skipped question</i>		<b>107</b>

Number	Response Date	Other (please specify) or please feel free to elaborate:	Categories
1	Jan 9, 2017 7:20 PM	25-30 minutes	
2	Jan 6, 2017 10:16 PM	Dependent on bookmobile service	
3	Jan 4, 2017 9:32 PM	20-25 minutes	
4	Oct 25, 2016 5:05 PM	I access online libraries and information.	

For the patron random sample, approximately 80% lived within 20 minutes while 15 participants did not use the library at all.

How long does it usually take you to travel to visit the library you most often use?		
Answer Options	Response Percent	Response Count
0-5 minutes	25.6%	10
5-10 minutes	30.8%	12
10-15 minutes	17.9%	7
15-20 minutes	10.3%	4
More than 20 minutes	7.7%	3
Other (please specify) or please feel free to elaborate:	7.7%	3
<i>answered question</i>		<b>39</b>
<i>skipped question</i>		<b>15</b>

### Urban vs. Rural

Overall the survey sample was 81.5% from rural communities.

### Montana State Library Five-Year LSTA Evaluation Survey

Do you live in Billings, Missoula, or Great Falls (communities with more than 50,000 residents)?		
Answer Options	Response Percent	Response Count
Yes	15.4%	20
No	81.5%	106

For the patron random sample that did respond to the question, 88% were from rural communities.

Do you live in Billings, Missoula, or Great Falls (communities with more than 50,000 residents)?		
Answer Options	Response Percent	Response Count
Yes	12.0%	3
No	88.0%	22

Other (please specify)	0.0%	0
<i>answered question</i>		<b>25</b>

### Gender

Both the aggregate and random sample were predominately female.

#### Montana State Library Five-Year LSTA Evaluation Survey

Please tell us your Gender:		
Answer Options	Response Percent	Response Count
Female	82.5%	127
Male	17.5%	27

Patron random sample gender breakdown.

Please tell us your Gender:		
Answer Options	Response Percent	Response Count
Female	70.6%	36
Male	29.4%	15

### Race

The overall sample was 95% White with representation from some American Indian or tribal members.

#### Montana State Library Five-Year LSTA Evaluation Survey

Please tell us your Race and check all that apply:		
Answer Options	Response Percent	Response Count
White	92.1%	140
White (Spanish/Hispanic/Latino)	2.6%	4
Black or African American	0.0%	0
American Indian or Alaskan Native	2.6%	4
Asian	0.7%	1
Native Hawaiian or Other Pacific Islander	0.0%	0

The patron random sample had a similar breakdown.

Please tell us your Race and check all that apply:		
--	--	--

Answer Options	Response Percent	Response Count
White	92.0%	46
White (Spanish/Hispanic/Latino)	4.0%	2
Black or African American	0.0%	0
American Indian or Alaskan Native	2.0%	1
Asian	2.0%	1
Native Hawaiian or Other Pacific Islander	0.0%	0
Other (please specify)	2.0%	1
<i>answered question</i>		<b>50</b>

### Age

The 24 and under age group did not participate in the survey and the majority of participants were 35 or over.

### Montana State Library Five-Year LSTA Evaluation Survey

**Please tell us your Age Range:**

Answer Options	Response Percent	Response Count
17 or Under	0.0%	0
18-24	0.6%	1
25-34	8.3%	13
35-44	14.1%	22
45-54	20.5%	32
55-64	32.1%	50
65-74	21.2%	33
75+	3.2%	5

The patron random sample represented an even older population with 76% being over 55.

**Please tell us your Age Range:**

Answer Options	Response Percent	Response Count
17 or Under	0.0%	0
18-24	2.0%	1
25-34	3.9%	2
35-44	2.0%	1
45-54	11.8%	6
55-64	31.4%	16
65-74	45.1%	23
75+	3.9%	2
<i>answered question</i>		<b>51</b>

Primary Language Spoken

English was the primary language spoken at home.

**Montana State Library Five-Year LSTA Evaluation Survey**

Please tell us what is the Primary Language you speak at home:		
Answer Options	Response Percent	Response Count
English	100.0%	156
Spanish	0.0%	0
Native American (please specify tribal language) or Other (please specify)	0.0%	0
<i>answered question</i>		<b>156</b>

Education Level

The education level of the sample skewed towards the college educated.

**Montana State Library Five-Year LSTA Evaluation Survey**

Your Education (highest degree earned):			
Answer Options	Response Percent	Response Count	
Some high school	0.0%	0	
High School diploma	16.1%	25	
Associate Arts (two-year community college)	9.0%	14	
Technical Certificate	5.2%	8	
Bachelor's Degree	28.4%	44	
Master's Degree	35.5%	55	
Ph.D./Ed.D.	0.6%	1	
JD	0.6%	1	
MD	0.0%	0	
Other (please specify)	4.5%	7	
<i>answered question</i>			<b>155</b>
<i>skipped question</i>			<b>60</b>
Number	Response Date	Other (please specify)	Categories
3	Nov 7, 2016 8:02 PM	up to two years of college	
4	Oct 25, 2016 8:48 PM	Some College and Library Certification	
5	Oct 19, 2016 9:31 PM	Have bachelors and working on masters	
6	Oct 18, 2016 9:02 PM	B.A. Plus many various non-degree University courses.	
7	Oct 18, 2016 8:01 PM	some college	

The patron random sample was a bit more normally distributed representing both college and non-college educated participants.

Your Education (highest degree earned):		
Answer Options	Response Percent	Response Count
Some high school	0.0%	0
High School diploma	31.4%	16



Associate Arts (two-year community college)	11.8%	6
Technical Certificate	11.8%	6
Bachelor's Degree	25.5%	13
Master's Degree	13.7%	7
Ph.D./Ed.D.	0.0%	0
JD	2.0%	1
MD	0.0%	0
Other (please specify)	3.9%	2
<i>answered question</i>		<b>51</b>
<i>skipped question</i>		<b>3</b>

Number	Response Date	Other (please specify)	Categories
1	Jan 9, 2017 8:08 PM	Military tech	
2	Jan 6, 2017 7:51 PM	Some college and some by correspondence	

### Household Income

There is a good distribution of household incomes represented in the survey participants.

### Montana State Library Five-Year LSTA Evaluation Survey

Your Combined Household Income:		
Answer Options	Response Percent	Response Count
\$0 - \$25,000	11.0%	16
\$25,000 - \$50,000	30.3%	44
\$50,000 - \$75,000	26.2%	38
\$75,000 - \$100,000	15.2%	22
\$100,000+	17.2%	25
<i>answered question</i>		<b>145</b>

The patron random sample showed a similar diverse distribution:

Your Combined Household Income:		
Answer Options	Response Percent	Response Count
\$0 - \$25,000	17.4%	8
\$25,000 - \$50,000	32.6%	15
\$50,000 - \$75,000	17.4%	8
\$75,000 - \$100,000	8.7%	4
\$100,000+	23.9%	11
<i>answered question</i>		<b>46</b>

### Computing Devices

Access to technology and the Internet are also key indicators to access to information. Unfortunately, because this survey was primarily disseminated online there is a built-in bias towards users who already have access.

#### Montana State Library Five-Year LSTA Evaluation Survey

Do you have a computing device (computer, laptop, and/or tablet) at home?		
Answer Options	Response Percent	Response Count
Yes	92.4%	146
No	7.6%	12
Other (please specify)	0.0%	0
<i>answered question</i>		<b>158</b>

The random sample, however, does give us a clearer view of a more typical perspective on access to technology among Montana residents at least among survey respondents.

Do you have a computing device (computer, laptop, and/or tablet) at home?		
Answer Options	Response Percent	Response Count
Yes	88.5%	46
No	11.5%	6
Other (please specify)	0.0%	0
<i>answered question</i>		<b>52</b>

### Internet Access

As expected the Internet is accessible via a number of different ways at home for survey participants.

#### Montana State Library Five-Year LSTA Evaluation Survey

Do you have access to the Internet at home and, if so, through what device(s) (check all that apply)?			
Answer Options	Response Percent	Response Count	
Laptop computer	72.0%	113	
Smartphone	65.0%	102	
Tablet	54.8%	86	
Desktop computer	42.0%	66	
Cellphone (no web browsing)	15.9%	25	
No, I do not have Internet access at home.	7.6%	12	
Chromebook	5.7%	9	
Other (please specify)	1.9%	3	
<i>answered question</i>			<b>157</b>
<i>skipped question</i>			<b>58</b>
Number	Response Date	Other (please specify)	Categories
1	Jan 11, 2017 9:08 PM	Kindle	
2	Oct 24, 2016 8:52 PM	very limited usage as we only have satellite no DSL	

The patron random sample showed similar connectivity with laptops being the most prominently used followed by smartphones, tablets, and desktop computers.

Do you have access to the Internet at home and, if so, through what device(s) (check all that apply)?		
Answer Options	Response Percent	Response Count
Laptop computer	68.6%	35
Smartphone	54.9%	28
Tablet	41.2%	21
Desktop computer	39.2%	20
Cellphone (no web browsing)	21.6%	11
No, I do not have Internet access at home.	9.8%	5
Chromebook	2.0%	1
Other (please specify)	2.0%	1
<i>answered question</i>		<b>51</b>
<i>skipped question</i>		<b>3</b>
Number	Other (please specify)	Categories
1	Kindle	

### Library Priorities

For the aggregate sample, the top four include checking out printed books, the website, accessing Wi-Fi, and public meeting use.

Please rate the importance of the following library services to you over the past 12 months:		
Answer Options	Rating Average	Response Count
1. Checking out printed books	5.95	152
2. Library Website (e.g. to search for materials, place materials on hold, renew materials, use research resources, or manage your account online).	5.21	150
3. Library Wi-Fi	5.16	152
4. To use public meeting rooms for any purpose, including voting	5.03	153
5. A place to socialize and attend community events	4.93	153
6. A place to work or study	4.65	151
7. Using reference materials, newspapers, magazines, or other periodicals	4.34	152
8. A place to read	4.22	152
9. Staff help with your computer or other digital device	4.08	151
10. Programs or services designed for children 5 and under	3.96	152
11. Downloading eBooks, music, or eAudio books	3.71	150
12. Computer or Internet training classes or workshops	3.71	151
13. Checking out movies on DVDs	3.66	151
14. Downloading Audio books	3.45	150
15. Programs or services to help find a job or create a resume	3.36	151
16. Help with homework for school aged children or teens	3.32	151
17. Checking out audio books or music on CDs	3.26	151
Average		4.24

- The difficulty with downloading audiobooks is that the two-week checkout is often too short to listen to the whole book.
- I don't know how to download eBooks or use audio books (except on my Kindle)
- I need to learn about downloading eBooks, music or eAudio books. Our library doesn't offer these services and I have never used them, but see how they could be helpful in some situations. I still like a "paper" book.

- Like to know the news from numerous sources. Prolific.
- I am often frustrated with the wait times when accessing Montana Library to Go.
- I love checking out books but will avoid things on disc whenever there is an option to download (at a cost or free). The discs are so often scratched or dinged that it becomes very frustrating to use them.
- I basically use the library for checking out printed books. Everything else is achieved in other manners.
- CONFESSION OF A SUPREME IRONY: Although I have long spent a couple of days a month, on average, on Library Issues for years past, since I can NOT read without marking - annotating, I have not checked out a Library Book in decades [I am 73 years old].
- My partner and I like to listen to books together, and downloading audiobooks allows us to enjoy that at home and on the road.
- Using the computer and internet effectively is getting more complicated with more interference from corporate media. Pop up ads are getting more intrusive, algorithms think they are smarter than the person using the computer, and privacy issues are becoming more important.
- Although I marked n/a because I do not personally use it, I still believe these are important for others.
- I don't have children, so those programs don't impact me personally, however I see a huge need for these services and think they are vital for the library and community. I don't rely on the library for wi-fi personally, but know for some it is their only access. When at the library I appreciate the access.
- There is not enough publicity about school aged tutoring available for school aged children. The Montana tutoring system that was online before was confusing to explain to patrons and the times available were quite...confusing if not just unapproachable. There needs to be a different approach to tutoring at the public library. Possibly a connection and/or a working WITH the school districts.
- Library wi-fi in our community is not good.
- I think the last two items.. are important for the kids ... our library is excellent with these services... my children are adults on their own....
- This is where I am at right now, if this were to span the last 5 years it would include programs for younger children. I frequented that sort of programming very regularly. I think computer literacy services are extremely important, but they are not services I need personally.
- My answers are based on a librarian. As a patron, I would not be using any of these services.
- All are very valuable for most Patrons.
- I like using the library wifi when given the option. I'm pretty tech-savvy and don't need help with learning new programs or devices.
- I have needed none of these services, however they are all very important to those who cannot afford them.
- library has no website available that allows checkouts, renew etc.
- I do most of my reading at home but do like to have a quiet place to read or study if needed.
- The job hunting services have been very important in the past.
- I go to the library to visit with the director and staff...
- My answers are a librarian and what I observe daily.
- I attend almost monthly - sometimes more often - as a Trustee Member of The FOUNDATION for our Missoula Public Library.
- library does not a website for above services. Users not allowed access
- Working in a library has actually resulted in me not going to one during my days off/leisure time.

The patron random sample ratings were much lower and had checking out printed books as the top choice but also had using reference materials (e.g. newspapers) and a place to socialize in its top four.

**Please rate the importance of the following library services to you over the past 12 months:**

Answer Options	Rating Average	Response Count
1. Checking out printed books	4.86	39
2. To use public meeting rooms for any purpose, including voting	4.06	39
3. Using reference materials, newspapers, magazines, or other periodicals	3.53	38
4. A place to socialize and attend community events	3.53	39
5. Library Website (e.g. to search for materials, place materials on hold, renew materials, use research resources, or manage your account online).	3.47	37
6. Library Wi-Fi	3.41	39
7. A place to read	3.17	39
8. Computer or Internet training classes or workshops	3.09	39
Programs or services designed for children 5 and under	3.03	39
Staff help with your computer or other digital device	3.03	38
Checking out audio books or music on CDs	3.00	39
A place to work or study	3.00	38
Help with homework for school aged children or teens	2.57	39
Checking out movies on DVDs	2.56	38
Programs or services to help find a job or create a resume	2.08	38
Downloading Audio books	1.94	39
Downloading eBooks, music, or eAudio books	1.89	39
Average	3.07	

### Technology Used to Access Information

In terms of priority daily information sources the telephone (wired or cellphone/smartphone) is the number one information source followed by using a laptop, texting, using a desktop computer, and listening to the radio.

**On a daily basis, how often do you use the following resources for accessing information?**

Answer Options	Rating Average	Response Count
1. Telephone (wired or cell)	4.61	155
2. Laptop computer	4.25	154
3. Smartphone texting	4.07	153
4. Desktop computer	3.89	154
5. Radio	3.83	157
6. Smartphone web browsing	3.76	153
7. Social Media (e.g. Facebook, Twitter, etc.)	3.73	156
8. Television	3.72	115
9. Smartphone mobile apps	3.68	155
10. Print magazines	3.57	154
11. Print newspaper	3.42	157
12. Tablet	3.22	152

13. Smartphone instant messaging (e.g. Instant messaging, Google Hangout, Facebook, Twitter, etc.)	3.16	152
14. Computer instant messaging (e.g. Google Hangout, Facebook, Twitter, etc.)	2.96	155
15. Tablet PC (e.g. Surface, iPad Air, etc.)	2.88	152
16. Cellphone (no web browsing)	2.39	149

The patron random sample had the same first two – telephone and laptop – but radio and access to print newspapers and magazines were both in the top five.

On a daily basis, how often do you use the following resources for accessing information?		
Answer Options	Rating Average	Response Count
1. Telephone (wired or cell)	4.79	52
2. Laptop computer	4.06	52
3. Radio	3.92	52
4. Print newspaper	3.67	52
5. Print magazines	3.63	52
6. Smartphone texting	3.55	51
7. Smartphone web browsing	3.52	50
8. Desktop computer	3.27	51
Smartphone mobile apps	3.18	51
Social Media (e.g. Facebook, Twitter, etc.)	3.04	52
Smartphone instant messaging (e.g. Instant messaging, Google Hangout, Facebook, Twitter, etc.)	2.81	48
Tablet	2.80	51
Computer instant messaging (e.g. Google Hangout, Facebook, Twitter, etc.)	2.73	51
Tablet PC (e.g. Surface, iPad Air, etc.)	2.65	49
Cellphone (no web browsing)	2.58	50
Television	1.82	11
	3.25	

### Daily Information Sources

Similar to other studies, the top five most important daily information sources were weather, email, and news (local, national, and world).

How important are the following INFORMATION sources in your daily life?		
Answer Options	Rating Average	Response Count
1. Weather	5.76	169
2. Email	5.71	170
3. Local news	5.58	170
4. National news	5.31	169
5. World news	5.30	170
6. Desktop Computer	4.88	169
7. Community resources	4.87	167
8. General website surfing	4.82	169
9. Smartphone/Cell phone Telephone Calls	4.77	169
10. Laptop Computer	4.77	168
11. Smartphone/Cell phone Texting	4.68	170
12. Community events	4.66	170
13. Smartphone	4.53	169

14. Government resources	4.10	169
Facebook	3.73	169
Tablet Computer	3.69	167
Telephone over the Internet (Skype, Gmail talk, etc.)	3.49	165
Social Media in General (e.g. Youtube, Instagram, LinkedIn, Snapchat, etc.)	3.36	169
Video conferencing (Skype, Google Video, Facetime, etc.)	3.18	166
Sports	2.76	167
Movie reviews	2.49	168
Blogging in general	2.33	169
Hunting/Fishing Reports and Forecasts	2.31	166
Chromebook	1.88	168
Twitter	1.73	162
	4.03	

- National news is mostly propaganda
- I do not have access to a computer and am not familiar with any electronic gadget.
- I want to be able to check factual sites for myself and patrons, as well as information that is indepth and of diverse content but complete. Often patrons and myself want very specific archival material that is difficult to find. Online and digital access to the two university libraries in the state would be amazing. Thanks.
- I don't seem to have time to get on Facebook or twitter. I really do use my Smartphone a lot.
- I am not a big user of social media but use email for most of my correspondence.
- need more computers in library and faster internet; more access
- Internet daily or weekly newsletters from groups like Heritage Foundation, Cato Institute, Hillsdale College.
- I love being a part of the libraries around here. Especially with bicentennial library.
- Reliance on Smartphone to access many other services including internet access when wi-fi is not available. It is also a source for maps and other resources.

Staying plugged in to national and local news and resources is a part of being an active citizen and informed consumer. Knowing resources available is part of patron services and needed professionally as well as personally.

Facebook for personal connections with others is important. It is not a place to get reliable info, but can provide info about community resources and events. Being able to call a place for more info is a nice option. My direct library line is an internet phone service and provides patron services regardless of if I am at my desk or not (forwards to my smart phone).

Computer/internet access is important for many levels of involvement and is not mentioned but a crucial part of information access.

- Google is your friend, and so is DuckDuckGo and the Reuters newsfeed; also BBC news.
- I get most of my information from from national news (tv) and government resources but I access those mostly from my smart phone
- Both for personal and professional use to promote library programs and important information to our community.
- People seem to be going towards avoiding phone calls if they can help it. Messenger services seem far more heavily used.
- I use the daily paper each day, not necessarily for work, but carry it into the work world. My phone has become an important part of keeping in contact with friends, logging personal information and I am using it more for email than a conventional laptop.
- I cannot afford a cell phone or Internet for personal use. I do not use social media - I value my privacy. I print out much because I do not enjoy reading longer information on the computer.

- I do almost - "virtually" - all of my communications activity - both incoming and outgoing - on my iPhone. N.B.: As a participant here, there should be a category for Library Foundation Trustee/Board Member. I am a former Public Library Trustee, a founding and continuing Public Library Foundation Trustee, a former State Library Commission Member, and a former U.S. National Commission on Libraries and Information Science (NCLIS) Member.
- We need free stuff for our patrons because most of them do not have jobs or the education to get jobs
- lack of internet access limits many of above sources lack of access to library services limits access to sources
- I value quick, efficient access to (online) information as indicated in my ratings of communication/social media/smartphone responses. As an adult services librarian, access to and understanding of community resources is paramount for both myself and library patrons.
- I still read newspapers, digital and print.
- I use the web almost exclusively for information searching, answers to questions about ideas, facts, history, etc. Wikipedia doesn't cover much depth when a patron or myself needs more specific answers to issues and ideas.
- I really depend on the weather on both smartphone and tv. Enjoy baseball and some other sports on TV. Also appreciate the local news.
- I get most of my information from familiar websites.
- In general, I am not a sports fan. I don't tend to go from site to site randomly. I heavily use certain sites repeatedly and rely on known reliable resources for most of my information gathering. Movie reviews are helpful for specific movies but not something I use on a daily basis.

All the other resources are relied on daily for general information purposes or specific research needs.

- I use information from these sources everyday to make decisions in a number of areas.
- I read a few newspapers online each day. I have more than 1200 "Apps" on my iPhone, and I regularly check about 40 each day.
- I'm easily bored by the news because reading it often feels like a chore (especially during election season), but my smartphone is invaluable for texting/calling/social media/weather-checking and music.
- My husband and I have 2 news websites.
- Not computer literet
- I faithfully follow my favorite sites.
- I also get a great deal of my information from various podcasts.
- everything at work is desktop computer, most home stuff is either desktop or laptop.
- I rarely use my laptop at home, instead my phone. I use a desktop computer at work two days a week. A daily paper is used every day.
- Desktop computer at work only. Check personal email once or twice a week; work email daily but only when at work, not from home.
- I have 2 tablets, but use either or both of them less than twice a week.
- lack of access to internet prevents many of sources i prefer mail
- Our household uses a desktop and laptop computer fairly frequently (daily), but neither are up to date in terms of operating system or software. We use computers and email all the time, both at work and at home. I use skype at work to keep conversations/questions going with co-workers when it is not always convenient to email or walk across the building to meet. Again, community events and their proliferation are paramount to my job.

For the patron random sample, the top five remained unchanged.



<b>How important are the following INFORMATION sources in your daily life?</b>		
<b>Answer Options</b>	<b>Rating Average</b>	<b>Response Count</b>
1. Weather	5.88	52
2. Local news	5.75	52
3. World news	5.23	53
4. National news	5.13	53
5. Email	4.91	53
6. Smartphone/Cell phone Telephone Calls	4.72	53
7. General website surfing	4.23	53
8. Community resources	4.19	53
9. Laptop Computer	4.19	52
10. Smartphone/Cell phone Texting	4.06	53
11. Smartphone	4.00	53
12. Desktop Computer	3.96	53
13. Community events	3.89	53
14. Government resources	3.66	53
Telephone over the Internet (Skype, Gmail talk, etc.)	3.14	51
Tablet Computer	3.08	53
Sports	2.94	52
Facebook	2.89	53
Hunting/Fishing Reports and Forecasts	2.60	52
Social Media in General (e.g. Youtube, Instagram, LinkedIn, Snapchat, etc.)	2.48	52
Video conferencing (Skype, Google Video, Facetime, etc.)	2.37	52
Movie reviews	2.25	52
Blogging in general	1.92	53
Chromebook	1.74	53
Twitter	1.26	50
	3.62	

### Entertainment Priorities

In terms of daily entertainment leisure reading was the top choice and then email and news followed closely by smartphone use, outdoor leisure activities, and texting.

<b>Answer Options</b>	<b>Rating Average</b>	<b>Response Count</b>
1. Leisure reading	5.71	170
2. Email	5.15	169
3. Local news	5.09	169
4. National news	4.88	170
5. Smartphone/Cellphone	4.59	170
6. Outdoor leisure activities (bicycling, horseback riding, skiing, etc.)	4.57	168
7. Smartphone texting/instant messaging	4.32	168
8. Attending community events (sports, theater, etc)	4.32	167
9. Exercising/playing sports	4.26	166
10. General website surfing	4.20	169
11. Watching TV in general	3.91	169
12. Facebook	3.85	169
13. Smartphone Talking on the Phone	3.74	167
14. Watching movies via DVD	3.58	169
15. Smartphone web browsing	3.55	169
16. Playing traditional games (e.g. board games, cards, etc.)	3.54	169

17. Watching movies on TV	3.51	169
Listening to music on the Internet	3.36	168
Netflix	3.24	165
Amazon Prime or Other Internet Streaming Services	3.20	169
YouTube videos	3.05	168
Watching movies at the theater	3.02	169
Watching movies on the Internet	2.79	168
Video conferencing (Skype, Google Video, Facetime, etc.)	2.72	166
Smartphone listening to music/podcasts	2.72	165
Watching / Reading about sports	2.64	168
Smartphone playing games/using apps	2.50	168
Telephone over the Internet (Skype, Gmail talk, etc.)	2.48	165
Movie reviews	2.24	167
Smartphone watching TV/videos/Movies, etc.	2.09	166
Redbox	1.65	168
Twitter	1.58	168
	3.50	

- I am not a big movie fan. I do like watching my choice of YouTube videos.
- Podcasts are also an important component of my information/entertainment source. (Sometimes, it is hard to differentiate between entertainment and information. For example, I find the NPR Politics Podcasts both entertaining and educational on political issues.)
- My iPhone is always at hand: I don't always respond to it; it is seldom turned off.
- love to read. no satellite etc TV no smartphone lack of internet makes email low priority
- I like easy, legal access to movies, so Netflix was ideal when we had a subscription. We don't have a TV but we have computers. I value leisure reading as an escape from technology (even if its on an ereader), and I believe a lot of our patrons do, too. Most people still come to our library to check out items.
- I do play card games on the net while I am listening to podcasts on my choice.
- some of the same questions
- I listen to music on either an mp3 player or my home system.
- Would love to play traditional games and cards if I had someone to play with!
- I play a little solitaire and gin rummy a couple/few times a week.
- no internet access as I live by (my)self (-) games aren't important but play some solitary cards
- Access to music is something I would really rather not do without.
- Socializing with friends is my preferred entertainment but it does not have to be at a sport event or theatre. Having a cup of tea and visiting is a good form of entertainment for me.
- These surveys are pretty ridiculous. Sorry, that is my opinion
- Watching TV in this case does not include watching TV on a TV. I took it to mean watching TV shows, regardless of the equipment I use to watch them, which in this case is on a laptop computer or tablet.
- I have no TV or smart phone... rarely go to movies...  
I read lots of books I get from the library...
- Would love to see movies in theater and attend more community activities but do not have the income for that.
- Do not use any other telephone instrument.
- no internet; low income so activities are limited
- I like to move around and make my body stronger. Working out keeps me sane.

The patron random sample had a similar top five but with local news being the top entertainment activity.

Answer Options	Rating Average	Response Count
1. Local news	5.25	53
2. Leisure reading	4.87	53
3. National news	4.70	53
4. Email	4.49	53
5. Outdoor leisure activities (bicycling, horseback riding, skiing, etc.)	4.23	53
6. Watching TV in general	4.19	53
7. Attending community events (sports, theater, etc)	4.06	53
8. Smartphone/Cellphone	3.98	53
9. Exercising/playing sports	3.92	52
10. Smartphone texting/instant messaging	3.62	53
11. General website surfing	3.62	53
12. Watching movies on TV	3.52	52
13. Smartphone Talking on the Phone	3.40	52
14. Smartphone web browsing	3.19	53
15. Facebook	3.15	52
Playing traditional games (e.g. board games, cards, etc.)	3.02	53
Watching movies via DVD	2.91	53
Watching / Reading about sports	2.88	52
Listening to music on the Internet	2.85	53
Watching movies at the theater	2.72	53
YouTube videos	2.49	53
Amazon Prime or Other Internet Streaming Services	2.43	53
Netflix	2.32	53
Telephone over the Internet (Skype, Gmail talk, etc.)	2.31	52
Video conferencing (Skype, Google Video, Facetime, etc.)	2.21	53
Smartphone playing games/using apps	2.11	53
Watching movies on the Internet	2.02	53
Smartphone listening to music/podcasts	1.74	53
Movie reviews	1.68	53
Redbox	1.64	53
Smartphone watching TV/videos/Movies, etc.	1.62	53
Twitter	1.21	53
	3.07	

### Final Survey Comments

- I cannot stress enough how important libraries (I feel) are to a community. They need to be built up and each community should be educated on what they offer. Advertise!
- Focus on operating within your budget.
- Libraries should be for the source of information, NOT a social service.
- The state library has been so very helpful in all the services and technological help in the last five years. Keep up the good work. THANKS.
- Nothing was mentioned in this survey about financing library services. I feel the State Library should continue to focus on getting the necessary financing through legislative actions. They have done a good job in the past and I think they should continue with this important function in the future.
- "Increased patron usage of services" and/or "customer satisfaction" are always a great goals for libraries.
- Marketing. Start thinking about how to market what is there. Show the world what it is we are, do and what great things that will work.
- It would be interesting to give respondents a choice between LSTA priorities for Montana. I thought they all looked good, and so marked them as important. I didn't have to choose, or even assign relative ranks. I am glad to have avoided this, because all the priorities are

important. But we don't have the capacity to respond to each of these priorities equally. I will watch the results of this survey with interest. Bruce Newell

- I think the loss of the online databases was a huge loss to all citizens and took one of the best resources the State Library provided for schools. We see very little to no use of MMP and yet it is still funded while the databases are not.
- I believe that everyone who works at the Montana State Library is amazing! The effort and thought you each put in to helping librarians across the state is remarkable. How libraries have grown and changed for the better over the last decade is impressive and I have great confidence in the next five years too! You have encouraged librarians to collaborate and work together for common goals and have provided ways for libraries from all sizes of communities to support each other and seek the common good.
- The questions seemed to be suggesting an overreach of both the State Library's control and their ability to perform. I sincerely question the State Library's ability to both run daily operations or provide infrastructure for individual libraries. I feel the State Library is best suited when it is providing the following:

- Vision for each new year, so the libraries (large and small) can be united by common goals and programming.

- Education for librarians (from large and small library) to update them on policies, technology, and new ideas for reaching both patrons and communities.

- Negotiating the contracts for state libraries, both large and small.

- Providing the answers to occasional legal or cataloging or public relations questions.

Over those functions, I can't see how the State Library can micromanage libraries that are so very different, with such different demographics. I think the State Library is a great resource, especially when it focuses on what it does best.

- I feel great about the current MSL staff and I am excited to see where their creativity and dedication takes us!
- Although I am not a new librarian, I am new to using SIRSI when it is not connected to a school system such as Billings Public Schools. I am using it competently, but maybe not comfortably. The workshops I've attended have helped. I do appreciate ILL program and use it quite a bit. I appreciate the work the staff does and the help they provide.
- Again, specifically inquire of Library FOUNDATION Trustees - many of whom are otherwise only Patrons, but who have special commitments.
- The State Library has started to focus more on rural areas, which is greatly appreciated. Continue to focus in this area, I believe, is extremely important.
- Keep up the good work. Thank you for not spending so much money on the databases that no one was using. Maybe bring back the auto database, that was the only one that anyone used in our library
- We appreciate all the resources that the Montana State Library provides for the libraries of Montana.

## VII. Conclusions & Recommendations

The results of the evaluation suggest that the Montana State Library has satisfactorily achieved its four 2013-2017 LSTA goals. The evaluation had seven primary goals and five have already been addressed in this report. The two remaining goals, highlight effective practices and make recommendations for use in organizing the next five years, are addressed as part of this evaluation's conclusions and recommendations.

## Highlight effective practices of MSL’s LSTA program

The State Library and LSTA program has broad level support and trust from Montana’s libraries and a common theme was how satisfied they were with the ability to be able to always turn to them when they had questions. There are three effective practices I wanted to highlight:

1. **Consultants assigned to serve specific federations** – this was repeatedly lauded as a strength and represented a consistent point of contact for librarians in each respective federation.
2. **Provision of online training and State Library certification** – as online learning continues to proliferate and grow in popularity worldwide, in a state as geographically spread out as Montana, this is both economically and pedagogically sound.
3. **Centralized vs. competitive services and LSTA allocation** – the general ethos of Montana culture seemed a unique blend of independence and collaboration. The centralized model helps focus limited resources on the State Library’s top priorities and Montana libraries and librarians who participated in the study all stated the satisfaction with and preference towards centralized services as opposed to innovation sub-grants that many other states use. Several directors who were from other states noted how competitive sub-grants created an unintended air of competition and also disenfranchised smaller libraries who did not have the staff resources or expertise to compete against larger systems. As noted by several staff members, this allows for pilot testing so that successful programs can be brought to scale to the rest of the state.

## Major Evaluation Findings

Based on the evaluation results, 51 major findings have been identified:

- 1) Montana’s population appears to be “graying” faster than the national average as its senior population is growing at a higher rate and exceeds the national average by 2.3%.
- 2) While on par with or doing better than the national average on a number of quality-of-life factors as measured by the US Census Bureau, Montana is below the national average in terms of median household income and per capita income over the past 12 months and above the national average in terms of poverty rate.
- 3) Because of the downturn in the economy in a number of natural resource staples such as coal, timber, and oil that generates jobs and a more robust tax base, loss of jobs and the continued shifting of the population towards seven of Montana’s largest cities has significantly impacted Montana, which has potential implications for library services in terms of resources, services, and programming.
- 4) The four main ways libraries serve the Montana community are – Programming focused on life-long education and entertainment, providing technology and digital access, providing books/magazines/newspapers/information, and access in terms of hours/location/ease-of-use/different formats.

- 5) The State Library can best support libraries in five ways – 1. Continue supporting “economically distressed” libraries whose local budgets have been recently cut while digital demand and cost continue to increase; 2. Focus integrated support in workforce development, digital literacy, and Internet access (librarians report these are commonly interrelated issues with patrons, especially when looking for jobs and trying to use resources); 3. Community education and outreach – much of the community does not seem to understand what libraries can do for them and are continuously surprised when some finally do use the library (this poses potential problems in terms of funding support from the community and community leaders as well); the other aspect of this is forming closer partnerships with organizations trying to do the same things and/or support the same types of patrons (e.g. literacy partnerships with schools); 4. Continue doing a great job in taking the lead in statewide resource sharing (MSC and ML2G, etc); and 5. Address concerns from some libraries about the “graying of the field” and the inability to recruit new library professionals or retain existing ones because of inadequate salaries or training.
- 6) Public libraries have seen local support (library income per capita) and state support (State Income Per Capita/Per Square Mile) continue to increase from 2006-2015.
- 7) Juvenile circulation of library resources has grown annually (except for a small dip in 2013) and increased overall by 12% from 2006 to 2015; Adult circulation has fluctuated, experienced a big dip in 2013 but continues to increase largely to digital circulation. Overall total circulation has remained relatively static but with a clear shift towards digital circulation.
- 8) Program offerings, consistent with national trends, have shown statistically significant increases over the past 10 years in young adult, adult, and overall programming offered. Children’s programs also increased by 42% but was not statistically significant.
- 9) Program attendance surprisingly did not see statistically significant increases for any age group. Closer examination found that children’s programs represented 67% of all programs offered and all attendees but attendance only grew by 27% while adult and young adult programs represented only 33% but attendance has grown at much higher rates (56% and 53%, respectively). A program-to-attendance ratio was calculated for the 2006-2015 time period and adult programs were found to have the highest ratio at 1/21.7 compared to 1/21.2 for children and 1/19.2 for young adults. All Montana programs combined had a 1/21.2 program-to-attendance ratio.
- 10) Library automation experienced statistically significance growth in three areas – number of computers available, full-text online databases, and public Internet terminals. At the same time, however, patron demand clearly also changed as the total number of computer users and annual computer usage dropped by 40%. While the demand for online databases continues to increase the demand for computers appears to be decreasing rapidly.

- 11) Wireless and Wired bandwidth continues to increase in importance as patrons and staff uploads and downloads in public libraries have increased at statistically significant levels. Wireless sessions have also increased significantly.
- 12) All other traditional library metrics have remained relatively stable over the past 10-year period, which is significant because it does not support the general societal notion that people are using libraries less; rather, they are using them differently.
- 13) There is a high positive return-on-investment as the more money per capita is invested in a public library. Library per capita income has statistically significant positive relationships/correlations with a wide array of other library inputs and outputs: the overall percent of registered borrowers, circulation per capita, collection per capita, expenditures per capita, and visits per capita.
- 14) There is a high positive return-on-investment as a main (or the only) library is open more hours. Weekly service hours of the main branch and overall weekly hours of all branches have positive and statistically significant relationships with a long list of library inputs and outputs – all categories of circulation, collection, staff with MLS degree, total visits, etc.
- 15) To increase overall annual per capita visits to a public library one should consider increasing the collection per capita, expenditures per capita, income per capita, and overall percentage of registered borrowers. While these are not causal or direct relationships there are real statistically significant and positive relationships. As one goes up so most likely will the other.
- 16) To increase program attendance at a public library it is recommended to increase per capita state income, full-time staff with a professional MLS degree, and overall staff.
- 17) Increasing programs and program attendance have positive and statistically significant correlations with employment, percent of population enrolled in elementary and middle school, percent of population enrolled in college, percent of population with a bachelor's degree, and median income.
- 18) Increasing circulation (all types) has positive and statistically significant correlations with percent of population enrolled in college and percent of population with a bachelor's degree, while circulation per capita has a negative relationship with percent of population over 25 with no high school diploma.
- 19) Increasing the overall percentage of registered borrowers has a positive correlation with household median income and a negative correlation with percent of population over 25 without a high school diploma.
- 20) The more staff with a professional MLS degree the higher percent of population enrolled in college and also has a bachelor's degree.

- 21) The primary challenges facing Montana libraries are funding/budgets, adequate staffing, physical accessibility, and resources.
- 22) The primary opportunities for Montana libraries are life-long learning programming, adequate and well-trained staff, partnerships and advocacy, and marketing and outreach.
- 23) Tribal college libraries face a number of unique challenges on all fronts (e.g. financial, cultural, historical, staffing, etc.) and the State Library could help most by providing one consultant (preferably a tribal member) that helps communication, partnerships, and collaborations between local public libraries and tribal nations; prioritize services to tribal members in public libraries; prioritize services and programming for tribal youth; and finally digitization as there are many artifacts and aspects of tribal history that are being lost. The most asked for service for tribal college librarians was more in-person training as well as more electronic resources.
- 24) The top three ways public libraries serve the Montana community are through life-long learning programming (with an emphasis on early child and adult literacy), providing access to technology and digital access, and providing access to high quality books, magazines, newspapers, and other information.
- 25) A 2015 statewide study involving all major library stakeholders created a strategic vision *Libraries are leaders in creating thriving communities*. Eight focal areas were identified – library directors, library boards, library infrastructure, lifelong learning opportunities, public access technology, collaboration, effective governance and funding, and staff.
- 26) A strategic framework was adopted by the State Library in December 2016 with a guiding purpose to help *all organizations, communities, and Montanans thrive through excellent library resources and services* with three primary priorities in which to achieve this vision: 1) Foster Partnerships, 2) Secure Sufficient and Sustainable Funding, and 3) Create a Useful Information Infrastructure.
- 27) Montana librarians were most satisfied with State Library services in the areas of OCLC group services, Montana Shared Catalog, the CE program, the MTBL, and early literacy and least satisfied with EBSCO Discovery Services, the courier service, consulting, downloadable e-content, and the MMP.
- 28) The LSTA program’s greatest strengths include statewide services such as MSC, TBL, MMP, consulting, training, excellent staff, with strong centralized projects that continue to improve.
- 29) The LSTA program’s greatest weaknesses include the ongoing challenge in providing electronic resources to all Montanans, a need for closer alignment between inputs, outputs, and MSL’s strategic plan and LSTA goals (lack of focus at times), ongoing evaluation informed by clear, measurable goals, increasing cost of the MSC, marketing and outreach



about the SL/LSTA activities, and being perpetually at their capacity and always near their breaking point.

- 30) The LSTA program's greatest opportunities include increasing partnerships with vendors and suppliers, improved communication as a team and organization, understanding local issues that may have statewide impact at a deeper level, creating a strong evaluation plan to ensure alignment with new strategic plan, taskforce recommendations, and LSTA goals, continuing to improve on existing projects, the success of their new lifelong-learning position, and continued use of data and performance-driven planning and evaluation.
- 31) The LSTA program's greatest threats include budget and concerns around it, loss of buying power or sustainability of existing programs and services, being stretched too thin, and tension between big and small libraries.
- 32) The LSTA program has successfully achieved four of the five recommendations fully from its 2008-2012 evaluation. Recommendation 1, however, focuses on evaluation and while some progress has been made more work needs to occur here.
- 33) Five of the nine IMLS priorities were clearly achieved while four - #6 (targeting library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills), #5 (Developing public and private partnerships with other agencies and community-based organizations), #7 (Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line), and #4 (Enhancing efforts to recruit future professionals to the field of library and information services), were lower rated and less prioritized during the 2012-2015 evaluation period.
- 34) Results for A-1 – Progress Towards LSTA 2013-2017 Goals. All four LSTA goals were achieved, although Goal 3 (MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons) received only 4% of LSTA funds allocated.
- 35) Results for A-2 - Five of the six Focal Areas have been clearly addressed and Focal Area 4 (Economic & Employment Development) will become a current and future priority through the creation of a new Lifelong Learning full-time position.
- 36) Results for A-3 – Three focal groups were clearly addressed with substantial focus (10% or more of all LSTA funds): Individuals with disabilities, the library workforce (current and future), and families. Although less of a consensus, children (0-5) and school-aged youth (aged 6-17) have been somewhat addressed.
- 37) Results for B-1 – SPRs have been used to help guide overall activities although the previous text-based only format made it much more difficult to use than the new more quantitative input, output, and outcome-based system.

- 38) Results for B-2 – No major changes were made to the 2013-2017 five-year plan despite significant staffing turnover and some major cuts in state-level funding.
- 39) Results for B-3 – SPRs are widely shared and disseminated with SL stakeholders.
- 40) Results for C-1 – An objective, outside, third-party evaluator was selected and conducted the evaluation in a valid and reliable fashion utilizing a full evaluation plan, evaluation cross-walk, and evaluation logic-model.
- 41) Results for C-2 – A mixed-method approach was used collect and analyze data using qualitative and quantitative methodology. This included the use of interviews, focus groups, survey, and site visits as well as analysis of 10-years of Montana public library statistics using Pearson-R correlation, ANOVA, and linear regression.
- 42) Results for C-3 - All major stakeholders were included in the sample – staff, administrative committees, librarians, and patrons. Sampling included stratified sampling intended to ensure diverse perspectives in terms of types of libraries from different regions of the state. In addition, 100 residents from each of the six federations were randomly selected and mailed a print survey. The total sample for the evaluation was 253 participants. This included interviews (n=5), focus groups (six focus groups, n=23), four site visits spanning five days in Montana (four different libraries were visited), and a community wide survey administered to the general public (N=161) and also mailed to a random sample (N=54).
- 43) Results for C-4 – Two reports will be generated from the evaluation – this full report and a refined final report that will be submitted to IMLS that adheres to its established page limits. The reports will be widely shared with all SL stakeholders and major findings and recommendations will be disseminated on a specially designed website.
- 44) IMLS Priorities – The patron random sample’s IMLS priorities were 1 (Expand services for learning and access to information and educational resources in a variety of formats), 8 (Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks), 3 (Provide librarian training and professional development), 2 (Establish or enhance electronic and other linkages and improved coordination among and between libraries), and 7 (Target library and information services to persons having difficulty using a library and to underserved urban and rural communities). A composite ranking for staff, librarians, the SLC/NAC and the random sample found the same five IMLS priorities.
- 45) Future IMLS Measuring Success Focal Areas - The randomly sampled patrons selected its top Focal Area Priorities as Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Civic Engagement (Focal Area 6), and Human Services (Focal Area 5). The composite rankings were Information Access (Focal Area 2), Lifelong Learning (Focal Area 1), Institutional Capacity (Focal Area 3), and Human Services (Focal Area 5), and introduced Institutional Capacity as a higher priority than Civic Engagement.

- 46) Focus groups with library directors, however, identified a different set of IMLS Focal Area priorities – Institutional Capacity (Focal Area 3), Information Access (Focal Area 2), Economic & Employment Development (Focal Area 4), Lifelong Learning (Focal Area 1).
- 47) Focal Group Future Priorities – the patron random sample prioritized school-aged youth, families, children, individuals with limited functional literacy, individuals with disabilities, and library workforce as their top priorities. The composite rankings identified the same five groups.
- 48) In terms of library priorities over the past year – the top five services were checking out printed books, using the website, Wi-Fi, using the public meeting rooms, and socializing or attending community events. The random sample had a similar top five but with using reference material as a higher priority than library Wi-Fi.
- 49) The top five types of technology used to access information daily were the telephone (wired or cellular), laptop, smartphone texting, desktop, and radio. The patron random sample replaced smartphone texting and using a desktop with reading print newspapers and magazines.
- 50) The top five daily information sources both the aggregate and random samples were weather, email, and local, national, and world news.
- 51) The top five entertainment priorities were leisure reading, email, local and national news, and using a smartphone/cellphone. The patron random sample introduced outdoor leisure activities into its top five.

## Recommendations

1. Continue improving evaluation activities by developing an evaluation process aligned with the State Library’s new strategic plan and three strategic directions. Ensuring that LSTA allocations, inputs, outputs, and outcomes are meeting your long-term goals as an organization will both help with internal decision-making but also serve as opportunity for clear dialogue with internal and external stakeholders about meeting their needs.
2. Utilize a logic model as both a real-time planning and evaluation tool to ensure all LSTA allocations are identified as inputs toward, and are aligned to, specific LSTA five-year goals. This will also assist you in documenting data that will be required by the new IMLS SPR system.
3. Prioritize the following IMLS Priorities (Finding 44):
  - IMLS Priority 1 – Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills.

- IMLS Priority 8 - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks.
  - IMLS Priority 3 - Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services.
  - IMLS Priority 2 - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services.
  - IMLS Priority 7 - Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved.
4. Prioritize the following IMLS Measuring Success Focal Areas:
- Information Access (Focal Area 2) – the demand for digital resources should only continue to grow and are particularly important in Montana because of its geography and low population density. Consider lending programs that emphasize mobile technology that is preloaded with desired digital information and/or uses prepaid cellular or satellite-based networks<sup>11</sup> for connectivity in rural areas with no traditional broadband access (e.g. tablets with prepaid set of minutes through cellular or satellite company).
  - Civic Engagement (Focal Area 6) - support all libraries in educating their communities about the role libraries play in today’s society and the suite of resources and services that are now available to them. The high return-on-investment libraries represent cannot be fully realized if many members of the community do not use them. In addition, 6.1 (improve users’ ability to participate in their community) was the highest ranked focal area intent. In addition, supporting tribal college libraries and helping tribal nations build closer partnerships and relationships with public libraries can serve as a nexus for increased cultural understanding, collaboration, and investment in the future that benefits everyone.
  - Lifelong Learning (Focal Area 1) – continue focusing on programming and other resources and services for seniors/ adults, young adults, and children.
  - Economic & Employment Development (Focal Area 4) – provide training, programming, and resources to support libraries in Montana communities to help them serve as community hubs and to help facilitate redefining workforces as

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<sup>11</sup> Broadband Satellite Networks by 2019, <http://www.theverge.com/2016/2/10/10958952/boeing-viasat-fast-internet-developing-countries-rural-homes>

- worldwide consumption of fossil fuels continue to diminish. Technology access and the requisite digital literacy necessary to negotiate it are prerequisites to succeed in today's workforce. While ranked #11 in the composite rankings, focus groups with library directors identified this as a high priority for most of them, which parallel the statewide economic transition from fossil fuels to other economies.
- Institutional Capacity (Focal Area 3) – in order for libraries to best serve their communities they must be accessible in terms of facilities, hours, well-trained staff, resources, and services. 3.2. (Improve the library's physical and technological infrastructure) and 3.1. (Improve the library workforce) were ranked #6 and #8 in the survey composite rankings.
  - Human Services (Focal Area 5) - 5.2. (Improve users' ability to apply information that furthers their personal or family health & wellness) and 5.3. (Improve users' ability to apply information that furthers their parenting and family skills) were ranked #7 and #10, respectively and 5.1 (Improve users' ability to apply information that furthers their personal, family, or household finances) is also pivotal for strengthening the overall economy.
5. Prioritize the following Focal Groups as significant funding priorities (10% or more of LSTA funding):
    - a. school-aged youth
    - b. families
    - c. children
    - d. individuals with limited functional literacy
    - e. individuals with disabilities, and
    - f. library workforce
    - g. Ethnic or minority populations – specifically tribal members and tribal nations
    - h. Individuals that are unemployed/underemployed
  6. Support libraries in providing robust support of information access to high priority information and entertainment sources in print and digital formats when applicable:
    - a. Weather
    - b. Email
    - c. News: local, national, and world
    - d. Smartphones (e.g. mobile apps)
    - e. Information around outdoor leisure activities
  7. Seek to assist libraries in increasing library inputs that have been found to be correlated to quality-of-life factors at positive and statistically significant levels including:
    - a. Library per capita income
    - b. Percent of registered borrowers
    - c. Weekly hours of main branch
    - d. Full-time staff with a professional MLS degree
    - e. Increasing programs and program attendance

- f. Increasing circulation (all types)
- 8. Use advanced statistical analysis centered around 10-year data trends and significant correlations and analysis of variance for each county and federation to help inform and support the positive impact local libraries are having on their respective communities and quality-of-life.

## VIII. Appendices

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## Appendix A - List of acronyms

- ANOVA - Analysis of Variance
- BARD - Braille and Audio Reading Download
- CE - Continuing Education
- ILL - Interlibrary Loans
- KLAS - Keystone Library Automated System
- M2G - MontanaLibrary2Go
- MMP - Montana Memory Project
- MSL - Montana State Library
- MTBL - Montana Talking Book Library
- NAC – Network Advisory Council
- POP - Patron Outreach Project
- R2R - Ready2Read
- STEAM - Science, Technology, Engineering, Art, and Math
- STEM - Science, Technology, Engineering, and Math



## Appendix B - List of participants

Data Collection	Stakeholder	Date	Participants	Location
Interview 1	State Librarian	6-Sep	1	State Library
Interview 2	LSTA Coordinator	6-Sep	1	State Library
Interview 3	Director of Statewide Resources	6-Sep	1	State Library
Focus Group 1	MSL Staff	6-Sep	6	State Library/Virtual
Focus Group 2	NAC	6-Sep	4	State Library
Interview 4	State Library Commission	6-Sep	1	State Library
Focus Group 3	Library Directors	25-Oct	4	State Library/Virtual
Focus Group 4	Library Directors	25-Oct	4	State Library/Virtual
Focus Group 5	Library Directors	25-Oct	4	State Library/Virtual
Site Visit 1	School Library	25-Oct	1	Helena
Interview 5	DPI	25-Oct	1	Helena
Focus Group 6	Library Directors	26-Oct	5	State Library/Virtual
Site Visit 2	Public Library	26-Oct	4	Clancy
Site Visit 3	Public Library	26-Oct	3	Boulder
Site Visit 4	Public Library	26-Oct	3	Butte
General Survey	All	12/1-1/15	161	Online
Random Survey	Patrons	12/1-1/15	54	Print mailers

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## Appendix C - Bibliography of all documents reviewed

- 10-Year Montana Public Library Statistics Table (2017). Unpublished data spreadsheet.  
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## Appendix D - Copies of any research instruments used for surveying, interviewing, and/or use of focus groups

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[Appendix D7 – Montana State Library LSTA Five-Year \(2013-2017\) Survey](#)

## Appendix D1 – Montana LSTA Evaluation Plan

### **Evaluation Goals**

- 1) Highlight effective practices of MSL’s LSTA program - *lsta overview, logic model, data collection*
- 2) Utilize both statistical and qualitative evaluation methods to assess the efficiency in implementing the activities used in advancing state goals - *built into mixed methods; self-assessment, satisfaction ratings, efficiency = accomplishing goals with maximum impact*
- 3) Develop key findings and recommendations from evaluating the past five years for use in organizing the next Five-Year Plan - *examine 2012 recommendations, identify major findings and recommendations for this evaluation, establish logic model for next five years*
- 4) Identify processes at work in implementing the activities in the plan, including the use of performance-based measurements in planning, policy making and administration - *detail organizational management and processes for MSL LSTA administration; review annual SPRs; SWOT analysis*
- 5) Answer Retrospective Questions:
  - A-1.
    - To what extent did your Five-Year Plan activities make progress towards each goal? *Logic model and data collection*
    - Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? *Logic model and data collection*
  - A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>12</sup> and their corresponding intents? *Logic model and data collection*
  - A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities? (Yes/No) *Logic model and data collection*
- 6) Answer Process Questions:
  - B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan? *Logic model and data collection*
  - B-2. Specify any changes you made to the Five-Year Plan, and why this occurred. *Data collection*
  - B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources? *Data collection*
- 7) Answer Methodology Questions
  - C-1. Identify how you implemented an independent Five-Year Evaluation using the

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<sup>12</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

criteria described in the section of this guidance document called Selection of Evaluators.

#### Evaluation report

C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.

#### Evaluation report

C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them. [Crosswalk, evaluation report](#)

C-4. Discuss how you will share the key findings and recommendations with others. [Evaluation, dissemination website, data collection](#)

### Guidelines for Retrospective and Process Questions

1. Make use of administrative data on program performance. This information can be data that is reported to IMLS on the SPR or other programmatic data collected by the SLAA. [All public library data from 2013-2016 - compare non-funded vs. funded vs. quality of life factors; annual LSTA report; analysis of each annual SPR](#)
2. The administrative data will likely need to be supplemented with information collected from interviews, surveys, and/or focus groups. [Data collection](#)
3. Data also may be available from secondary documents, including contracted third-party program evaluations, studies from non-partisan entities, and any SLAA reports submitted to IMLS and state policy makers. [All evaluations and IMLS reports available.](#)
4. Other sources of information, such as Census data, state education data, and surveys conducted by the SLAA may be used to describe broad changes in communities or in the state. While these, for the most part, cannot be used for making direct attributions of outcomes from LSTA programming efforts, they can effectively describe the context of activities undertaken. [Yes, and will also run ANOVA and linear regression to seek relationships especially with state education data.](#)
5. Descriptive statistics should suffice in conducting any quantitative analysis. The mixing of summary tables and/or figures summarizing the results in the narrative is customary in this type of research. Presentation of extensive statistical output is generally reserved for appendices. [Descriptive stats, crosstabs, and advanced statistics will be included as appendices.](#)
6. A content analysis (with potential descriptive statistics for summarizing codes) is probably an acceptable method for conducting qualitative analysis. There are various types of sampling and coding strategies that will precede selecting a content analysis or other analytical choice; the independent evaluator should make these transparent in allowing you and other readers to assess the credibility of the evidence. (See below for more details on evaluation methodology and using an independent evaluator.) [Qualitative data collection of major stakeholders through interviews and focus groups; additional qualitative data collected via survey by stakeholder. Thematic encoding of transcripts and open ended comments.](#)

## Guidelines for Methodology Questions

7. The independent evaluator should clearly address these questions to your satisfaction before proceeding to collect and analyze data. Schedule 9/2 meeting and drafts of all data collection instruments.
8. The independent evaluator will need to carefully document project records used in the study. Professional guidelines for this type of research require protocols in place to ensure confidentiality and consent. Private server for all data collection results; consent form for all participants
9. In working with the independent evaluator, other stakeholders reviewing the document should have set aside appropriate time to assure that they have enough knowledge of the scientific techniques that the evaluators will be using in collecting and analyzing data, including tradeoffs that they are making given limited resources and time. Approval from MSL team
10. You should include a section that summarizes the methods used in any statistical and qualitative research. For qualitative research, many types of sampling and coding strategies may be appropriate; whatever gets selected should be made transparent in this section. Yes, will be part of approval process
11. The appendices should contain copies of any instruments used for data collection as well as those used in coding. Copies of all instruments and coding sheet and dictionary.

## Evaluation Crosswalk

- List all MSL goals, objectives, and activities
- List all IMLS priorities
- List all IMLS Retrospective, Process, and Methodology questions
- List Report outline sections (see full outline below): IMLS priorities, focal areas and intents (A-2), and focal groups (A-3)

## 2013-2017 Logic Model

- Situation: SWOT analysis, general overview of MSL organization and functioning (needs assessment)
- Priorities: Vision, Mission, LSTA plan goals and objectives
- Assumptions: Support of libraries? Efficiency and effectiveness of allocation? Success of LSTA projects funded? Representativeness
- External Factors: Census, state priorities, state of libraries
- MSL completes inputs, outputs, outcomes by goal, budget, and program

## Performance Data

“For the LSTA funded projects, what I would like is as much information as possible based on annually:

- What/who was funded - name, type of library, service population, and region of the state (whatever classification makes sense here - NE, NW, SE, SW, etc.)
- How much
- Type of grant
- Intended stakeholders

- The proposal and their annual reports
- Any key outputs and outcomes you have identified
- Which MST goal, objective, or activity they were aligned to
- Were they aligned with IMLS' Measuring Success Focal Area?"
  
- Compare funded by year
  - Descriptive stats
  - ANOVA by demographics by funding
  - Quality of life (census)
  - Educational data (k-12)
- Compare with non-funded by year
- Linear Regression (compare input, output, and outcome variables)

### *Sample*

The desired sample will include:

- All LSTA staff of the MSL
    - Interviews with Cara and State Librarian (Jennie) and Director of Statewide Library Resources (Tracy)
    - Focus group with remaining staff (LSTA-funded projects and positions)
      - Christie Briggs, Montana Talking Book Library Director
      - Jo Flick, Statewide Trainer & Continuing Education Coordinator
      - Jessie Goodwin, Montana Shared Catalog Director
      - Sara Groves, Lifelong Learning Librarian
      - Pam Henley, Statewide Consulting Librarian
      - Suzanne Reymer, Statewide Consulting Librarian
  - A purposeful (specifically selected to ensure they are included in the sample) and stratified (different types are selected to ensure representation) sample of libraries
    - Public
    - Academic
    - School
    - Special
    - Tribal
    - Urban/Rural
    - Patron Demographics
    - Funded vs. Non-funded
  - Librarians and library administrators:
    - All funded
    - Focus group of random/stratified (2 per type of library per year - 1 random, 1 top)
- “Why don't you select two per year per type of stakeholder served for 2013, 2014, 2015, and 2016.

This should give us 8 members per type of focus group. 1 should be randomly selected and 1 can be hand picked as a top/model program.”

- Public library (2 focus groups?) - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
- Academic library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
- School library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)

- Special library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
- Purposeful and stratified sample of patrons
  - All funded (emailed survey link)
  - Random sample focus groups based on type of library: 2 recipients per year - 1 random and 1 top/model program
    - Public library (2 focus groups?) - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
    - Academic library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
    - School library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
    - Special library - 1 random, 1 top per year (2013, 2014, 2015, and 2016)
- Random sample of patrons (e.g. representative of the state’s racial, ethnic, and socioeconomic demographics).
  - Needs assessment? Value of libraries? Do they use libraries?

### *Instrumentation & Data Analysis*

#### **Interviews**

- MSL administration
  - Context, process, SWOT analysis, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes

#### **Focus groups**

- MSL staff
  - Context, process, SWOT analysis, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes
- State commission members (three to four)
  - Context, process, SWOT analysis, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes
- Librarians and administrators
  - Impact of LSTA funding, impact on stakeholders, logic model elements
  - Responses coded by theme and organized by question; presented as common themes and quotes
- Patrons
  - Impact of LSTA funding, impact on stakeholders, logic model elements
  - Responses coded by theme and organized by question; presented as common themes and quotes



**Surveys** - draft is at <https://www.surveymonkey.com/results/SM-SQMQN8DM/>

- All LSTA MSL Staff
  - Quantitative ratings on: process, progress towards goals and objectives, IMLS priority focal areas and groups; next five years?
  - Responses coded by theme and organized by question; presented as common themes and quotes
  - Descriptive statistics
  - ANOVA for each goal and objective (are staff more satisfied with progress on a particular goal or objective)
- LSTA funded librarians and administrators
  - Quantitative ratings on: Impact of LSTA funding, impact on stakeholders, logic model elements; satisfaction, open ended comments
  - Responses coded by theme and organized by question; presented as common themes and quotes
  - Descriptive statistics
  - Correlation - progress/satisfaction by demographic factor
  - ANOVA for each goal and objective (are staff more satisfied with progress on a particular goal or objective) - progress/satisfaction by demographic factor
  - Linear Regression - progress/satisfaction by multiple factors
- All librarians and administrators
  - Quantitative ratings on: Impact of LSTA funding and/or funded projects, impact on stakeholders, logic model elements; current and future needs, satisfaction, open ended comments
  - Responses coded by theme and organized by question; presented as common themes and quotes
  - Descriptive statistics
  - Correlation - progress/satisfaction by demographic factor
  - ANOVA for each goal and objective (are staff more satisfied with progress on a particular goal or objective) - progress/satisfaction by demographic factor
  - Linear Regression - progress/satisfaction by multiple factors
  - Funded vs. Non-funded

[Appendix D2 – Montana LSTA Evaluation Crosswalk](#)

High Priority Goals	Data	Interviews	Interview Questions	Focus Groups	Survey	Survey Questions	Social Media	Data Analytics
<b>Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.</b>	Reports and logic model	MSL, librarian, administrators, patrons	Q4	MSL staff, trustees, librarians	MSL staff, librarians, patrons	Q2		
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q2		
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q3		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q4		
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q5		

<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q6</p>		
<p>1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q7</p>		
<p><b>Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.</b></p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>	<p>MSL staff, trustees, librarians</p>	<p>MSL staff, librarians and administrators</p>	<p>Q8</p>		
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q8</p>		
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q9</p>		

provide high-quality digitization equipment for libraries to use.								
2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q10		
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q11		
2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q12		
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q13		

<p><b>Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL’s number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.</b></p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>	<p>MSL staff, trustees, librarians</p>	<p>MSL staff, librarians and administrators</p>	<p>Q14</p>		
<p>3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q14</p>		
<p>3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q15</p>		
<p>3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q16</p>		
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q17</p>		
<p>3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q18</p>		

partnerships between courier services and libraries. (see goal #2, program 36 above)								
3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q19		
<b>Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.</b>	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q20		
4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q20		

4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q21		
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q22		
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q23		
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q24		
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q25		
Were any Goals Not Met?	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26		
<b>IMLS LSTA-specified Grants to States Priorities (20 U.S.C. § 9141)</b>								
1. Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals'	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q27		

needs for education, lifelong learning, workforce development, and digital literacy skills;								
2. Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q28		
3. Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q29		
4. Enhance efforts to recruit future professionals to the field of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q30		
5. Develop public and private partnerships with other agencies and community-based organizations;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q31		
6. Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q32		
7. Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q33		
8. Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q34		



9. Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q35		
<b>Measuring Success Focal Areas and Intents</b>								
1. Lifelong Learning	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.1. Improve users' formal education	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.2. Improve users' general knowledge and skills	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
2. Information Access	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.1. Improve users' ability to discover information resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.2. Improve users' ability to obtain and/or use information resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
3. Institutional Capacity	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.1. Improve the library workforce	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		

3.2. Improve the library’s physical and technological infrastructure	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.3. Improve library operations	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
4. Economic & Employment Development	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.1. Improve users’ ability to use resources and apply information for employment support	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.2. Improve users’ ability to use and apply business resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
5. Human Services	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.1. Improve users’ ability to apply information that furthers their personal, family, or household finances	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.2. Improve users’ ability to apply information that furthers their personal or family health & wellness	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.3. Improve users’ ability to apply information that furthers their parenting and family skills	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		

6. Civic Engagement	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.1. Improve users' ability to participate in their community	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.2. Improve users' ability to participate in community conversations around topics of concern.	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
<b>2012 evaluation recommendations</b>								
1. MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.		MSL staff	Q11a	MSL staff, trustees, librarians	MSL staff	Q48		
2. MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.		MSL staff	Q11b	MSL staff, trustees, librarians	MSL staff	Q49		
3. MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.		MSL staff	Q11c	MSL staff, trustees, librarians	MSL staff	Q50		
4. The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group. Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless		MSL staff	Q11d	MSL staff, trustees, librarians	MSL staff	Q51		

transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.								
5. MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.		MSL staff	Q11e	MSL staff, trustees, librarians	MSL staff	Q52		
<b>IMLS Retrospective, Process, and Methodology Questions</b>								
A-1 To what extent did your Five-Year Plan activities make progress towards each goal? Logic model and data collection		MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q2-Q25		
A-1 Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?		MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26		
A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents? Logic model and data collection		MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q36-Q41		
A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities? (Yes/No) Logic model and data collection		MSL staff	Q6	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q42		
Answer Process Questions:								
B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan? Logic model and data collection		MSL staff	Q7	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q45		
B-2. Specify any changes you made to the Five-Year Plan, and why this occurred. Data collection		MSL staff	Q8	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q46		
B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources? Data collection		MSL staff	Q9	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q47		
Answer Methodology Questions								
C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance			Evaluation Report					

document called Selection of Evaluators. Evaluation report								
C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.			Evaluation Report					
C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them. Crosswalk, evaluation report			Evaluation Report					
C-4. Discuss how you will share the key findings and recommendations with others. Evaluation, dissemination website, data collection			Evaluation Report					
<b>Logic Model</b>								
Situation (assets, problems, and engagement)		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
Priorities (guiding strategic plan)		MSL staff	Q2	MSL staff, trustees, librarians				
Assumptions		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
External Factors		MSL staff	Q1, Q3	MSL staff, trustees, librarians, patrons				

Appendix D3 – Montana LSTA Evaluation Logic Model

High Priority Goals	Year	Budget	Inputs	Outputs		Outcomes	Rating (Scale of 1-10, 1=lowest attainment, 10=highest attainment)	Comments
Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.				Activities	Frequency		Average of ratings for all Goal 1 objectives.	
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.								
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.								
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training								
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.								
1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and								

<p>facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>										
<p>1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.</p>										
<p>Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.</p>										
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>										
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>										
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the</p>										

state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.								
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.								
2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.								
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.								
Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL’s number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.								
3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.								
3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]								



<p>3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.</p>										
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>										
<p>3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)</p>										
<p>3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.</p>										
<p><b>Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address</b></p>										

<b>content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.</b>										
4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.										
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.										
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.										
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.										
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.										
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.										

[Appendix D4 –Staff Interview/Focus Group Questions](#)

**State Library Staff Interview Questions**

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)

How has this changed from the past five-year 2008-2012 LSTA plan?

3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1) - **See Program to Activity Crosswalk**
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and

collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
  - 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>13</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users’ formal education
- 1.2. Improve users’ general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users’ ability to discover information resources
- 2.2. Improve users’ ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library’s physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users’ ability to use resources and apply information for employment support
- 4.2. Improve users’ ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users’ ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users’ ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users’ ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users’ ability to participate in their community
- 6.2. Improve users’ ability to participate in community conversations around topics of concern.

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?

- 8. Library workforce (current and future)
- 9. Individuals living below the poverty line

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<sup>13</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

10. Individuals that are unemployed/underemployed
11. Ethnic or minority populations
12. Immigrants/refugees
13. Individuals with disabilities
14. Individuals with limited functional literacy or information skills
15. Families
16. Children (aged 0-5)
17. School-aged youth (aged 6-17)

**Process Questions:**

18. B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?
19. B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.
20. B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?
21. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:
  - a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
  - b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
  - c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
  - d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audiobooks*

*(cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation's population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

## 22. Ongoing Evaluation per the Five-Year Plan

### **Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

16. "Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level."
17. "While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews."
18. "The following evaluation period should include an analysis of MSC in both urban and rural libraries."

"Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC's input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.





## Appendix D5 – NAC and Library Commission Focus Group Questions

### **State Library Commission/NAC Focus Group Questions**

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)
  - 2-a. How would you, as a NAC [or Commission] representative, describe your role in the LSTA planning, policy making, and administration process?
  - 2-b. What part of the process helps you to serve in this role?
  - 2-c. What part of the process should be improved to help you serve in this role?
3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the

information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

- a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)
5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
- 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State**

**Goal 2: acquire and manage content; provide access)**

- 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.
6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>14</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of

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<sup>14</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

concern.

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)

8. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:

- a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
- b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
- c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
- d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences,*

*physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation’s population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

## 9. Ongoing Evaluation per the Five-Year Plan

### **Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

19. “Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level.”
20. “While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews.”
21. “The following evaluation period should include an analysis of MSC in both urban and rural libraries.”

“Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC’s input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.”

[Appendix D6 – Librarian and Patron Interview/Focus Group Questions](#)

### Librarian Focus Group Questions

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, ease-of-use and interaction, etc.
3. What are the State Library’s strengths and opportunities? Do they use performance-based measurements in planning, policy making and administration?
4. To what extent, do you feel the State Library met the following goals in support of Montana’s libraries and patrons?
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL’s number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017*

*period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. To what extent do you feel the State Library has met these priorities and do you feel these should be the same priorities for 2018-2022?
  - 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent do you feel the State Library met the following associated with the Measuring Success focal areas<sup>15</sup> national priorities? Which do you feel should be priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of concern.

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<sup>15</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)



7. A-3. Did any of the following groups represent a substantial focus for the State Library (Yes/No)? Which should be the primary focus over the next five years (2018-2022)?

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)

8. Any other thoughts or comments about what the State Library needs to focus on over the next five years?

[Appendix D7 – Montana State Library LSTA Five-Year \(2013-2017\) Survey](#)

Insert PDF or link to PDF

[Appendix E - Optional output of statistical findings](#)

Pending

[Appendix F - Optional summaries of coding used in any qualitative analyses](#)

Pending

## Five-Year Evaluation Report Outline

IMLS-CLR-D-0019

Documents required for the Five-Year Evaluation include a cover page (1 page), evaluation summary (2-5 pages), evaluation report (25 pages, max.), and appendices. Please follow the format specified below:

### Cover Page (1 page)

- State Library Administrative Agency
- Title of the evaluation
- Evaluator(s) name and organizational affiliation
- Date
- Name of the team, branch, unit, or person commissioning the evaluation

### Evaluation Summary (2-5 pages)

- Summarize key findings for the three retrospective and three process questions below
- Briefly describe the evaluation methodology, referencing the four methodology questions below

### Evaluation Report (25 pages, max.)

- Answer the first six questions under A. Retrospective and B. Process in order, and numbered as they are below.
- Describe the methodology employed, responding to the four questions under C. Methodology, below.

#### A. Retrospective Questions

A-1. To what extent did your Five-Year Plan activities make progress towards each goal? Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?

- Organize findings around each goal of the state's 2013-2017 Five-Year Plan
- Categorize each goal as either 1) achieved, 2) partly achieved, or 3) not achieved

A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?

Measuring Success Focal Areas and Intents

- Lifelong Learning
  - Improve users' formal education
  - Improve users' general knowledge and skills

- Information Access
  - Improve users' ability to discover information resources
  - Improve users' ability to obtain and/or use information resources
- Institutional Capacity
  - Improve the library workforce
  - Improve the library's physical and technological infrastructure
  - Improve library operations
- Economic & Employment Development
  - Improve users' ability to use resources and apply information for employment support
  - Improve users' ability to use and apply business resources
- Human Services
  - Improve users' ability to apply information that furthers their personal, family, or household finances
  - Improve users' ability to apply information that furthers their personal or family health & wellness
  - Improve users' ability to apply information that furthers their parenting and family skills
- Civic Engagement
  - Improve users' ability to participate in their community
  - Improve users' ability to participate in community conversations around topics of concern.

A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities? (Yes/No)

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)
- For the purposes of this question, a substantial focus would represent at least ten percent of the total amount of resources committed by the overall plan across multiple years.
- For those who answer Yes to any of the above groups, please discuss to what extent each group was reached.

## **B. Process Questions**

B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?

B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.

B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?

## **C. Methodology Questions**

C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of Evaluators.

C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.

C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them.

C-4. Discuss how you will share the key findings and recommendations with others.

## **Appendices**

- List of acronyms
- List of people interviewed
- Bibliography of all documents reviewed
- Copies of any research instruments used for surveying, interviewing, and/or use of focus groups
- Optional output of statistical findings
- Optional summaries of coding used in any qualitative analyses

### **IMLS LSTA-specified Grants to States Priorities (20 U.S.C. § 9141)**

- Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills;
- Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services;
- Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services;
- Enhance efforts to recruit future professionals to the field of library and information services;
- Develop public and private partnerships with other agencies and community-based organizations;
- Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills;
- Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved;
- Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
- Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.



**Appendix D2 – Montana LSTA Evaluation Crosswalk**

High Priority Goals	Data	Interviews	Interview Questions	Focus Groups	Survey	Survey Questions	Social Media	Data Analytics
<b>Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.</b>	Reports and logic model	MSL, librarian, administrators, patrons	Q4	MSL staff, trustees, librarians	MSL staff, librarians, patrons	Q2		
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q2		
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q3		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q4		
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular	Reports and logic model	MSL staff, librarians and administrators	Q4		MSL staff, librarians and administrators	Q5		

venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.								
1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q6		
1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q7		
<b>Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.</b>	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q8		
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q8		

purchase new products for pilot projects designed to determine use and value.								
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q9		
2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q10		
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q11		
2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q12		

partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.								
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q13		
<b>Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL’s number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.</b>	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q14		
3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q14		
3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q15		

<p>3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q16</p>		
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q17</p>		
<p>3.5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q18</p>		
<p>3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q19</p>		

<p><b>Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.</b></p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>	<p>MSL staff, trustees, librarians</p>	<p>MSL staff, librarians and administrators</p>	<p>Q20</p>		
<p>4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q20</p>		
<p>4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q21</p>		
<p>4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so</p>	<p>Reports and logic model</p>	<p>MSL staff</p>	<p>Q4</p>		<p>MSL staff, librarians and administrators</p>	<p>Q22</p>		

that system improvements and features can be fully utilized for patrons to access MTBL resources.								
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q23		
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q24		
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.	Reports and logic model	MSL staff	Q4		MSL staff, librarians and administrators	Q25		
Were any Goals Not Met?	Reports and logic model	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26		
<b>IMLS LSTA-specified Grants to States Priorities (20 U.S.C. § 9141)</b>								
1. Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q27		
2. Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q28		

3. Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q29		
4. Enhance efforts to recruit future professionals to the field of library and information services;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q30		
5. Develop public and private partnerships with other agencies and community-based organizations;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q31		
6. Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q32		
7. Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved;	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q33		
8. Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q34		
9. Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.	Reports and logic model	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q35		

**Measuring Success Focal Areas and Intents**



1. Lifelong Learning	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.1. Improve users' formal education	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
1.2. Improve users' general knowledge and skills	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q36		
2. Information Access	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.1. Improve users' ability to discover information resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
2.2. Improve users' ability to obtain and/or use information resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q37		
3. Institutional Capacity	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.1. Improve the library workforce	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		

3.2. Improve the library’s physical and technological infrastructure	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
3.3. Improve library operations	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q38		
4. Economic & Employment Development	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.1. Improve users’ ability to use resources and apply information for employment support	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
4.2. Improve users’ ability to use and apply business resources	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q39		
5. Human Services	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.1. Improve users’ ability to apply information that furthers their personal, family, or household finances	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
5.2. Improve users’ ability to apply information that furthers their personal or family health & wellness	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		

5.3. Improve users' ability to apply information that furthers their parenting and family skills	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q40		
6. Civic Engagement	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.1. Improve users' ability to participate in their community	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
6.2. Improve users' ability to participate in community conversations around topics of concern.	Reports, logic model, and program crosswalk	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators, and patrons	Q41		
<b>2012 evaluation recommendations</b>								
1. MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.		MSL staff	Q11a	MSL staff, trustees, librarians	MSL staff	Q48		
2. MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.		MSL staff	Q11b	MSL staff, trustees, librarians	MSL staff	Q49		
3. MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.		MSL staff	Q11c	MSL staff, trustees, librarians	MSL staff	Q50		
4. The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.		MSL staff	Q11d	MSL staff, trustees, librarians	MSL staff	Q51		

Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals’ life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.								
5. MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.	MSL staff	Q11e	MSL staff, trustees, librarians	MSL staff	Q52			
<b>IMLS Retrospective, Process, and Methodology Questions</b>								
A-1 To what extent did your Five-Year Plan activities make progress towards each goal? Logic model and data collection	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q2-Q25			
A-1 Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?	MSL staff	Q4	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q26			
A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents? Logic model and data collection	MSL staff	Q5	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q36-Q41			
A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities? (Yes/No) Logic model and data collection	MSL staff	Q6	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q42			

Answer Process Questions:								
B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan? Logic model and data collection		MSL staff	Q7	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q45		
B-2. Specify any changes you made to the Five-Year Plan, and why this occurred. Data collection		MSL staff	Q8	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q46		
B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources? Data collection		MSL staff	Q9	MSL staff, trustees, librarians	MSL staff, librarians and administrators	Q47		
Answer Methodology Questions								
C-1. Identify how you implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of Evaluators. Evaluation report			Evaluation Report					
C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.			Evaluation Report					
C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation and how you engaged them. Crosswalk, evaluation report			Evaluation Report					
C-4. Discuss how you will share the key findings and recommendations with others. Evaluation, dissemination website, data collection			Evaluation Report					
<b>Logic Model</b>								
Situation (assets, problems, and engagement)		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
Priorities (guiding strategic plan)		MSL staff	Q2	MSL staff, trustees, librarians				

Assumptions		MSL staff	Q1, Q3	MSL staff, trustees, librarians				
External Factors		MSL staff	Q1, Q3	MSL staff, trustees, librarians, patrons				

[Appendix D3 – Montana LSTA Evaluation Logic Model](#)







High Priority Goals	Year	Budget	Inputs	Outputs	Outcomes
<b>Administrative costs for managing LSTA award</b>	Fiscal Year				
<b>Goal 1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered.</b>		\$ 1,278,663.89		<b>Activities</b>	<b>Frequency</b>
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	FY2012		3 FTE for statewide consulting - all LSTA funding	Consulting contacts on leadership issues; broadband; technology planning; projects/ideas; trustee orientation (does not include e-rate or MTLIB2GO, etc.)	593
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	FY2013		3 FTE for statewide consulting - all LSTA funding	In addition to their regular duties, the 3 consultants helped revise the criteria for receiving the “Excellent Library Standards Award” (ELSA). The ELSA recognizes libraries that use MT’s Public Library Standards to assess and improve their services. Other types of libraries can also earn the award based on applicable standards. Number of	188
					As a result of the new ELSA standards, libraries are encouraged to strive harder to improve library services. The public library district transition planning template reduces the stress of the transition to a district and helps keep the process on track.

				libraries that received ELSA in this award period:		
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	FY2014		Partial time of 3 FTE Statewide Consulting Librarians	Consulting contacts on leadership issues; broadband; technology planning; projects/ideas; trustee orientation (does not include e-rate or MTLIB2GO, etc.)	134	
1.1. Provide leadership on critical issues, local policies, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.	FY2015	\$231,291.87	Partial time of 3 FTE Statewide Consulting Librarians	Consulting contacts on leadership issues; broadband; technology planning; projects/ideas; trustee orientation (does not include e-rate or MTLIB2GO, etc.)	151	
					1066	
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.			Partial time of 1 FTE-statewide consultant	Led strategic planning sessions. Number of sessions	15	
1.2. Facilitate community leadership, library as community anchor, outreach services,	FY2013		Partial time of 3 FTE Statewide	Facilitated planning meetings	4	

community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.			Consulting Librarians			
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.	FY2014		Partial time of 3 FTE Statewide Consulting Librarians	Facilitated planning meetings	6	
1.2. Facilitate community leadership, library as community anchor, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.	FY2015		Partial time of 3 FTE Statewide Consulting Librarians	Facilitated planning meetings	4	4 meetings/53 attendees
					29	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2012	\$216,957.00	3 FTE for statewide consulting - all LSTA funding	Consultants made site visits to all 82 public libraries during this reporting period. During the reporting period, information was provided on a wide range of topics including mobile devices, collection management, OCLC enrollment, services and software, building planning, statistics, human resources, marketing, library policies, social software, MTLibrary2Go, MT Shared Catalog, MT Memory Project, Discover It, EZ Proxy	412	Library directors gained the knowledge necessary to meet the requirements of the public library standards.

				<p>and the MT Library Directory. Other consulting was provided for IT support, filtering, library exhibits, building issues, blogging platforms, school-community library issues, web pages, Internet privacy concerns, RSS feeds, library board and funding body relationships, collection management, e-book creation and self-publishing. Additionally, consultants provided assistance with library districts, administration, disaster planning, technology planning, strategic planning, friends and foundations, CE and professional development, Library Federation plans of service and annual reports, reference resources, technology specifications, board development, intellectual freedom, library standards, and E-rate.</p> <p>NUMBER OF SITE VISITS:</p>		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA	FY2013	\$215,010.21	3 FTE for statewide	3 full-time library consultants offer consulting in general and	122	

will be used for MSL staff to provide onsite consultation and training			consulting - all LSTA funding	specialty areas of library development and provide continuing education opportunities for librarians and library trustees statewide. Number of site visits:		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2014	\$222,473	3 FTE for statewide consulting - all LSTA funding	Number of site visits:	135	State Library consulting contributed to the success of many administrative efforts in small public libraries around the state facing challenging situations. Consultants assisted two libraries in revising interlocal agreements; one library with board reorganization; and one library federation with transitioning to new leadership. Consultants also contributed to the development of a new staffing/compensation plan to assist directors and boards with attracting and retaining excellent employees.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2012		1 FTE	Number of libraries that received assistance for participating in E-Rate program:	220	55 MT public libraries benefited from assistance in applying for E-rate, and received \$80,000 in discounts.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2013		1 FTE	The E-Rate consultant attended annual E-Rate trainings in October 2013 in Portland, OR and the 2014 Schools Health & Libraries Broadband Conference in Washington, DC, participated in the American Library Association E-Rate Task Force, and provided data to ALA Office for Information Technology Policy on MT library broadband availability, E-Rate costs, and	60	The 60 libraries participating in E-Rate saved \$82,800 through the program.

				participation. This consultant prepared comments representing MT libraries for the Federal Communications Commission E-Rate Modernization Order, and attended monthly State E-Rate Coordinator teleconference meetings. Number of libraries that received assistance for participating in the E-Rate program:		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2014			Number of libraries that received assistance for participating in the E-Rate program:	54	54 libraries received over \$92,000 in e-rate funding. This helped them pay for voice and Internet services for their communities and enables them to connect with outside resources.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2015		3	Number of libraries that received assistance for participating in the E-Rate program:	51	E-rate consultations increased the bandwidth speed and improved the technology infrastructure. It resulted in a local savings of \$135,357.28.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2012		3 FTE	Information requests from public library staff:	1712	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2013		3 FTE	Information requests from public library staff:	330	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2014			Information requests from public library staff:	494	

1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2015		3	Information requests from public library staff:	282	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2012		3 FTE	Consultant-led trainings (in-person and virtual):	189	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2013		3 FTE	Consultant-led trainings (in-person and virtual):	50	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2014			The three Library Consultants planned and carried out training sessions for public library boards and new public library directors to help them become familiar with the laws, standards, and best practices necessary to provide and maintain successful library services. Consultant-led trainings (in-person and virtual):	22	Through formal training and orientation sessions, new library directors and board members became familiar with their responsibilities and with the wide variety of resources available, resulting in improved library services in their communities.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2015		3	The three Library Consultants planned and carried out training sessions for public library boards and new public library directors to help them become familiar with the laws, standards, and best practices necessary to	52	



				provide and maintain successful library services. Consultant-led trainings (in-person and virtual):		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2012		3 FTE	Number of people in attendance at consultant-led trainings:	2274	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2013		3 FTE	Number of people in attendance at consultant-led trainings:	859	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2014			Number of people in attendance at consultant-led trainings:	286	Through formal training and orientation sessions, new library directors and board members became familiar with their responsibilities and with the wide variety of resources available, resulting in improved library services in their communities.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2015		3	Number of people in attendance at consultant-led trainings:	416	
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2012	\$1,822	3 FTE	The consultants provided public library staff training and guidance using the Technology Petting Zoo (TPZ), a set of tablets and ereaders that library staff can use to experience working with new technology. Tablets added to TPZ:	28	Library staff gained experience with current technological devices in order to better serve their patrons and connect them to state-supported online services such as MontanaLibrary2Go.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA	FY2012		Partial time of 3 FTE- statewide consultants	The consultants provided public library staff training and guidance using the Technology	110	

will be used for MSL staff to provide onsite consultation and training				Petting Zoo (TPZ), a set of tablets and ereaders that library staff can use to experience working with new technology. 7 trainings were given. Number of attendees:		
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2013	\$12,900	3 FTE; \$7,193 non-state match for equipment	The Technology Petting Zoo is a set of tablets and e-readers that library staff can use to experience working with new technology. As library patrons increasingly use tablets to access library content and services, MT librarians continue to educate themselves to provide better support to their users. MSL updated the content and administration of its TPZ kits during this period. 10 new iPad tablets and 10 Google Nexus tablets were purchased for new “tablet labs” that add training opportunities in addition to our existing laptop labs. Number of items added:	20	115 librarians attended a poster session at the 2014 Fall Workshop where they had the opportunity to try out tablets and learn about their applications. 2 new tablet labs purchased with FY13 LSTA support guided exploration and training for library staff on workplace apps and concepts like roving reference and embedded librarianship. Projectors and speakers augment these training labs. As the comfort level has increased and the technology itself rapidly and continually changes, MSL has switched to a maintaining a core set of 5 TPZ kits. Each kit is customized specifically to supply the appropriate equipment to the 3 Statewide Consultants, the MSC Trainer and the Talking Book Library staff so that they can provide effective training and support to the librarians and TBL patrons they serve.
1.3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training	FY2014		\$21,915	Items added to Technology Petting Zoo kits:	4	Two projectors and two sets of speakers were purchased to augment two State Library tablet training labs. This equipment further enables MSL training staff to provide successful training to librarians around the state using these labs.
			\$14,722			
1.4. Provide formal face-to-face training opportunities each year that	FY2012	\$60,969.94	1 FTE - Statewide CE Coordinator			

help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.			who managed all of the following projects			
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2013	\$63,768	1 FTE - Statewide CE Coordinator who managed all of the following projects			
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2014	\$68,593	1 FTE - Statewide CE Coordinator who managed all of the following projects			
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2015	\$66,193.08	1 FTE - CE Coordinator			

venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.						
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2012	\$10,673.01	1 FTE	Fall Workshops sessions offered:	53	At the Fall Workshop, the sustained 40% increase in attendance in 2011 was sustained in 2012
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2013	\$21,072.69	1 FTE	Fall Workshops sessions offered:	21	Respondents consistently rank Fall Workshops sessions highly. 86 -100% rated the sessions at Fall Workshops as relevant to their jobs, 86-100% rated the session presenters as well prepared, and 78-90% said that the sessions met their expectations.
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for	FY2015	\$11,725.76	1	Fall Workshops sessions offered:	12	80 attendees completed an online evaluation survey following their attendance at Fall Workshops. A large majority of attendees reported that the training was interesting (60-78%), related to their job(s) (60-70%), expanded knowledge or skills (62-70%), and was practical (50-77%).

expenses including facilities, materials and presenters.						
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2012		1 FTE	Fall Workshops attendees:	561	
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2013		1 FTE	Fall Workshops attendees:	160	Respondents consistently rank Fall Workshops sessions highly. 86 -100% rated the sessions at Fall Workshops as relevant to their jobs, 86-100% rated the session presenters as well prepared, and 78-90% said that the sessions met their expectations.
	FY2015		1	Fall Workshops attendees:	140	
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2012	\$5,922.41	1 FTE	Trustee training hours:	21	Attendees gave the presenters high grades, and overwhelmingly noted that opportunities for trustees to network are rare and much appreciated. At the 2013 Montana Library Association meeting, the Flathead County Library System was honored as Montana’s first board where all the trustees had attained MSL certification under the state library’s certification program for trustees. This was a significant positive outcome in support of the MSL certification program and a model for other boards.

<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2013</p>	<p>\$9,258.68</p>	<p>1 FTE</p>	<p>MSL coordinated 3 in-person trustee trainings in 2014 at 3 sites: Billings, Kalispell, and Butte. Training centered on preparing boards to handle transitions in library leadership staff. Half of all librarians in MT are retirement age, making it critical that library boards have the resources and training to recruit and retain qualified staff. Trustee training hours:</p>	<p>9</p>	<p>Evaluation at Trustee trainings have uncovered a need for template materials to assist library boards in a director search and hire, for example. Through discussion with the CE cohort supported by the Chief Officers of State Library Agencies (COSLA), it has been determined that this is a common need across states. In response, the CE Coordinator at MSL is working with her peers to develop these materials.</p>
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2014</p>	<p>\$4,991</p>	<p>1 FTE</p>	<p>The Montana State Library provided onsite and online training directed at public library boards on the topic of planning for succession at several venues for the purpose of preparing library trustees for replacing key positions at their libraries. Trustee training hours:</p>	<p>12</p>	<p>89% of trustee training attendees reported that they learned something that was directly applicable to their library, and 75% noted that they were now aware of specific gaps that exist at their libraries that need to be addressed. 25% found that the procedures they have in place put them in good shape to manage a transition in executive staff, and a few mentioned that the affirmation of their preparedness was reassuring.</p>
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2015</p>	<p>\$5,481.87</p>	<p>1</p>	<p>The Montana State Library provided onsite and online training directed at public library boards on the topic of planning for succession at several venues for the purpose of preparing library trustees for replacing key positions at their libraries. Trustee training hours:</p>	<p>12</p>	

<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2012</p>		<p>1 FTE</p>	<p>Trustee training attendees:</p>	<p>335</p>	<p>Attendees gave the presenters high grades, and overwhelmingly noted that opportunities for trustees to network are rare and much appreciated. At the 2013 Montana Library Association meeting, the Flathead County Library System was honored as Montana’s first board where all the trustees had attained MSL certification under the state library’s certification program for trustees. This was a significant positive outcome in support of the MSL certification program and a model for other boards.</p>
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2013</p>		<p>1 FTE</p>	<p>Trustee training attendees:</p>	<p>34</p>	<p>2 of a series of 3 onsite trustee trainings were augmented by an online version of the training to reach a greater audience and provide a follow-up resource accessible anytime. Ensuring Library Leadership Continuity webinars with Jim Nys were replayed a total of 17 times. Hakala’s 4 part webinar series, Happily Ever After: Board/Directory Relationships that Work generated more than 50 plays.</p>
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2014</p>		<p>1 FTE</p>	<p>Trustee training attendees:</p>	<p>116</p>	<p>89% of trustee training attendees reported that they learned something that was directly applicable to their library, and 75% noted that they were now aware of specific gaps that exist at their libraries that need to be addressed. 25% found that the procedures they have in place put them in good shape to manage a transition in executive staff, and a few mentioned that the affirmation of their preparedness was reassuring.</p>
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and</p>	<p>FY2015</p>		<p>1</p>	<p>Trustee training attendees:</p>	<p>64</p>	

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1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2012	\$3,367.62	1 FTE	Scholarships for library staff:	20	R-Squared attendees shared their experiences with MT colleagues through a day-long training, inspired by the conference, at the MT Library Association conference in April 2013.
1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.	FY2013	\$6,596.44	1 FTE	Scholarships for library staff to attend the Association of Rural & Small Libraries annual conference and the American Library Association conference.	4	The ALA scholarship attendee partnered with Multnomah County (OR) Library staff on a webinar after attending their ALA “My Librarian” session, and shared how he was adapting their ideas at his library. The webinar had 10 live attendees and 44 plays on Vimeo.



<p>will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>				<p>Number of scholarships offered:</p>		
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2014</p>	<p>\$14,776</p>		<p>The Montana State Library used FY14 LSTA to sponsor scholarships for public librarians and members of the Montana State Library's Network Advisory Committee to attend national conferences. Afterward, the recipients shared conference findings with their peers via recorded webinar sessions facilitated by the State Library. Scholarships for library staff:</p>	<p>9</p>	<p>Scholarship attendees have commented that without the scholarship opportunities provided through the State Library, they would never have been able to attend a national conference. Post-conference sessions also increased knowledge sharing and collegiality within the Montana library community. An hour long webinar session, "Great Ideas from the ARSL Conference," was presented by 2014 attendees and uploaded to the MSL Vimeo channel (<a href="http://vimeo.com/112195336">http://vimeo.com/112195336</a>). At reporting time, this video had been replayed 22 times. The American Library Association 2015 Annual Conference Montana peer sharing webinar (<a href="https://vimeo.com/139648042">https://vimeo.com/139648042</a>) had been replayed 11 times.</p>
<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>	<p>FY2012</p>		<p>1 FTE</p>	<p>Online training hours created:</p>	<p>292</p>	<p>The output of more than 80 webinars and tutorials added to the MSL Vimeo channel and linked through the learning portal during the grant period resulted in a measurable increase in application to the MSL certification program. In calendar year 2012, there was a 90 % increase in certifications issued. In calendar year 2012, there were 80 certifications issued by the MSL; the previous 3 years had an average of 46 per year.</p>
<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other</p>	<p>FY2013</p>	<p>\$10,750.22</p>	<p>1 FTE</p>	<p>The Online Training and Meeting Software pilot gives public library directors, staff and trustees access to online meeting and training software that enables</p>	<p>82</p>	<p>A. Public library directors and staff become comfortable utilizing their individual GoToMeeting licenses to network with colleagues around the state, optimize meeting opportunities related to overall library administration, and advance the public service goals of their library within their individual</p>

<p>online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>			<p>them to virtually meet, collaborate, and share expertise. MSL was able to expand its existing Citrix contract to include 82 additional licenses, one for each public library. Directors manage their license internally, enabling staff or library trustees to also organize online meetings and trainings if desired. Through GoToMeeting, librarians network with colleagues, increase board meeting participation, and facilitate community discussions that lead to partnership opportunities. Librarians also have access to shared GoToTraining and GoToWebinar licenses. MSL also acquired more licenses for its staff to increase webinars facilitated by MSL in support of LSTA efforts. Number of GoToMeeting licenses provided to public libraries:</p>		<p>communities. B. Public library directors and staff utilize the shared GoToTraining and GoToWebinar licenses available from the State Library to share expertise and collaborate on ideas for library development and resource sharing with their colleagues around the state, and to provide direct training and assistance to their end users. C. The State Library gains an understanding of the ways in which libraries can use online meeting applications to gain efficiencies, expand services and reach new audiences. D. There is a notable expansion of training expertise that gradually develops from within the library community, as librarians begin to utilize these tools to collaborate and assist each other. E. The 6 library federations in the state see benefits, such as an increase in trustee attendance at federation meetings and meetings of multiple federations for purposes of training and collaboration. F. Librarians gain a better understanding of the use of online meeting tools as an option for specifically publicly noticed meetings.</p>
<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars</p>	<p>FY2014</p>		<p>Montana State Library LSTA-funded staff conducted 81 online training classes directed primarily toward public library staff and trustees</p>	<p>81</p>	<p>Evaluative measures for webinars include in-session feedback, statistical analysis from the MSL Vimeo channel, and informal peer review. MSL webinars are well received, archived recordings are popular with library staff, and applications for MSL certification continue to</p>

<p>and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>			<p>to support continuing education and provide a no-cost training option for public libraries so that they may provide innovative and world-class services to library patrons. These classes were recorded and added to Vimeo, an online video hosting site, so that library staff could review the information on their own time and earn CE credit toward certification. Online training hours created:</p>		<p>trend up. Librarians can search Vimeo to quickly find content either by MSL CE category classification or by the MSL program that the training is developed to address. MSL’s Learning Portal also links to national providers of online training for libraries. The constant online availability of learning opportunities supports the MSL Continuing Education Certification Program, a requirement for all MT public library directors, and an optional program for other staff and trustees.</p>
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>	<p>FY2015</p>	<p>1</p>	<p>Montana State Library LSTA-funded staff conducted online training classes directed primarily toward public library staff and trustees to support continuing education and provide a no-cost training option for public libraries so that they may provide innovative and world-class services to library patrons. These classes were recorded and added to Vimeo, an online video hosting site, so that library staff could review the information on their own time and earn CE credit toward certification. Online training hours created:</p>	<p>59</p>	<p>Applications for Montana State Library Certification reveal that users depend upon online training to supplement their face-to-face training activities. 62.5%, nearly two thirds, of librarians currently tracking their CE in the Montana Library Directory have listed that they have attended a webinar in the past few years. The mode number of webinars attended is three. Among those that have actually achieved certification, the reliance on webinars for their professional development is significantly higher. Web-based learning supports the State Library Certification program by expanding the learning opportunities for librarians and trustees, and reducing hurdles such as limited travel budgets, extreme weather, and long distances in Montana.</p>

<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>	<p>FY2012</p>		<p>1 FTE</p>	<p>Number of certifications issued to library staff:</p>	<p>309</p>	<p>Library directors in Montana are required to maintain certification through the State Library program in order to receive state aid funding. All other library staff are encouraged to achieve certification. An increase in certification signifies a better educated and skilled library workforce in Montana.</p>
<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>	<p>FY2013</p>		<p>1 FTE</p>	<p>Number of certifications issued to library staff:</p>	<p>80</p>	<p>Nearly 500 individuals have registered to track their CE with MSL, and an average of 80 librarians and trustees apply for certification or renewal every year.</p>
<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>	<p>FY2014</p>			<p>The CE Coordinator managed the Certification program and led the process to transition to a completely online system. Number of certifications issued to library staff:</p>	<p>63</p>	<p>The application procedure for Montana State Library Certification was moved to an exclusively online process for all library staff and trustees in order to improve data collection, reduce errors in processing, ease the process for applicants, and create a procedure that is sustainable as requests for certificates continue to increase while staff-time available for processing is decreasing.</p>
<p>1.4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and</p>	<p>FY2015</p>		<p>1</p>	<p>The CE Coordinator managed the Certification program and led the process to</p>	<p>86</p>	

<p>programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.</p>				<p>transition to a completely online system. Number of certifications issued to library staff:</p>		
<p>1.5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training</p>	<p>FY2013</p>		<p>1 FTE</p>	<p>Number of webinars available on the MSL Vimeo channel:</p>	<p>69</p>	<p>Evaluative measures for webinars include in-session feedback, statistical analysis from the MSL Vimeo channel, and informal peer review. MSL webinars are well received, archived recordings are popular with library staff, and applications for MSL certification continue to trend up. Librarians can search Vimeo to quickly find content either by MSL CE category classification or by the MSL program that the training is developed to address. MSL’s Learning Portal also links to national providers of online training for libraries. The constant online availability of learning opportunities supports the MSL Continuing Education Certification Program, a requirement for all MT public library directors, and an optional program for other staff and trustees.</p>
<p>1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.</p>	<p>FY2012</p>		<p>7 LSTA-funded MSL staff contributed to the development of the Learning Portal throughout this reporting period: the Training and Development Specialist, the Montana Memory Project Director, a Reader Advisor from Talking</p>	<p>The Learning Portal is a website created and maintained by MSL staff. The purpose of the Learning Portal is to provide a centralized location for online learning resources produced by MSL or as a result of MSL programs, to support continuing education of library staff and trustees statewide, and to enhance use and understanding of MSL</p>	<p>254</p>	<p>MSL staff set the following outcomes set for the Learning Portal: 1. Provide anytime, anywhere rigorous and relevant training opportunities to Montana librarians and library trustees to improve information services and library operations statewide. 2. Support the Montana Library Certification program for library staff and trustees by making it easier to find training that qualifies for continuing education credit and applies to one of the four CE categories, so that more librarians and trustees achieve their certification. 3. Nurture a culture of learning among library staff, volunteers and trustees so that they not only seek out more training</p>

			Book Library, the Training and Technical Services Specialist for the Montana Shared Catalog, and the 3 library consultants.	statewide projects and programs. The Library Learning Portal contains information about training opportunities, library development materials, and handouts from former workshops sponsored by MSL. Pages of Learning Portal content developed during this period:		opportunities, but they share what they know with their peers across the state and beyond.
1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.	FY2013		1 FTE	Learning Portal pages maintained during this period:	73	1. Provide anytime, anywhere rigorous and relevant training opportunities to Montana librarians and library trustees to improve information services and library operations statewide. 2. Support the Montana Library Certification program for library staff and trustees by making it easier to find training that qualifies for continuing education credit and applies to one of the four CE categories, so that more librarians and trustees achieve their certification. 3. Nurture a culture of learning among library staff, volunteers and trustees so that they not only seek out more training opportunities, but they share what they know with their peers across the state and beyond.
1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.	FY2014			Learning Portal pages maintained during this period:	73	The Continuing Education Coordinator adjusted and expanded the Montana State Library Learning Portal to provide easier access to training materials and better navigation so that all library staff could more quickly and easily find relevant on-demand training. 78.5 percent of respondents enrolled in a six part series exploring online resources that are licensed statewide for libraries and their patrons noted that they liked that they did not have to travel to get training. 57% indicated that they felt connected to the class. Every respondent cited at least two reasons why they liked the online class.

<p>1.6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.</p>	<p>FY2015</p>		<p>5</p>	<p>Learning Portal pages maintained during this period:</p>	<p>35</p>	
<p>Goal 2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services.</p>	<p>FY2012</p>	<p>\$1,628,319.90</p>				
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>FY2012</p>	<p>\$16,334.00</p>	<p>The Statewide Projects Librarian administered this project (0.25 FTE funded by LSTA in this period). [Do we want to include volunteer committee inputs or just MSL resources?]</p>	<p>MSL staff worked with OverDrive to add new libraries, led online trainings for participating libraries on accessing circulation and collection statistics, promotional materials, and support documentation, created step-by-step tutorials on the MSL Learning Portal, created a page documenting membership meetings and committee work on the Statewide Library Resources Portal, facilitated meetings for the membership, Executive Committee, and Selection Committee, worked with the Selection Committee in facilitating the purchase of new content, and provided basic</p>	<p>10</p>	<p>The consultants provided public library staff training and guidance using the Technology Petting Zoo (TPZ), a set of tablets and ereaders that library staff can use to experience working with new technology. Number of trainings = 7 Number of attendees:</p>

				technical support and troubleshooting to participating library staff. Number of trainings provided:		
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2012		0.25 FTE	Number of MontanaLibrary2Go training attendees:	103	Attendees gained the skills they needed to serve their local library patrons using MontanaLibrary2Go.
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds); In-kind match = 338 hours member library staff time	Number of MontanaLibrary2Go trainings provided:	2	Attendees gained the skills they needed to serve their local library patrons using MontanaLibrary2Go.
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services	FY2014		0.25 FTE (Statewide Projects Librarian,	Number of MontanaLibrary2Go trainings provided:	2	



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2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of MontanaLibrary2Go training attendees/times replayed:	37	Attendees gained the skills they needed to serve their local library patrons using MontanaLibrary2Go.
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing	FY2012	\$9,000	0.25 FTE	MSL covered the \$1,500 one-time-only startup vendor fee for new libraries joining MontanaLibrary2Go. Number of libraries that joined the consortium in this award period:	17	A total of 92 libraries and branches now participate in MontanaLibrary2Go.

materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.						
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2013	\$7,500	0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of libraries that joined MontanaLibrary2Go during the award period:	6	Use of LSTA funds for eliminating startup fees and hosting a central platform for shared content allowed all sizes of public libraries in the state to participate in ebook and downloadable audiobook lending and offer a vast collection of content to their patrons at minimal cost. The new membership cost share formula includes three different subtiers within what was previously the lowest tier, to create a more equitable cost structure per patron for the smallest libraries. The new lowest tier for new participating libraries (0-999 patrons) paid an annual fee of \$482 for access to over 22,000 items by the end of FY13, averaging out to under \$.02 per item.
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2014	\$6,000	0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of libraries that joined MontanaLibrary2Go during the award period:	4	Use of LSTA funds for eliminating startup fees and hosting a central platform for shared content allowed all sizes of public libraries in the state to participate in ebook and downloadable audiobook lending and offer a vast collection of content to their patrons at minimal cost. The new membership cost share formula includes three different subtiers within what was previously the lowest tier, to create a more equitable cost structure per patron for the smallest libraries. The new lowest tier for new participating libraries (0-999 patrons) paid an annual fee of \$482 for access to over 22,000 items by the end of FY13, averaging out to under \$.02 per item.
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services	FY2012	\$12,000	0.25 FTE	MSL used LSTA to pay for the annual hosting fee for the shared OverDrive	2,641,906	Use of LSTA expenditures in eliminating startup fees and hosting a central platform for shared content allowed even the smallest MT libraries

<p>libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>				<p>platform. MontanaLibrary2Go annual circulation:</p>		<p>to participate in ebook and downloadable audiobook lending and offer a huge collection of content to their patrons. The lowest tier for new participating libraries (0-4000 patrons) paid \$825 per year for access to over 20,000 items by the end of FY12, averaging out to under \$.05 per item. The value and popularity of this service has inspired many donations from member libraries, Friends groups, and library federations toward the shared content budget in the amount of \$47,237.</p>
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>FY2013</p>	<p>\$12,000</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>MSL used LSTA to pay for the annual hosting fee for the shared OverDrive platform. MontanaLibrary2Go annual circulation:</p>	<p>607,637</p>	<p>The value and popularity of this service has inspired many donations from member libraries, Friends groups, and library federations toward the shared content budget in the amount of \$40,396. This amount was collected from 6 public libraries and 4 federations representing all sizes and budgets. The number of checkouts during this period increased by 32%.</p>
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing</p>	<p>FY2014</p>	<p>\$12,000</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>MSL used LSTA to pay for the annual hosting fee for the shared OverDrive platform. MontanaLibrary2Go annual circulation:</p>	<p>749,996</p>	<p>Circulation (number of checkouts) increased by 23%</p>

<p>materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>						
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>FY2015</p>	<p>\$15,000.00</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>MSL used LSTA to pay for the annual hosting fee for the shared OverDrive platform. MontanaLibrary2Go annual circulation:</p>	<p>862,563</p>	<p>During the reporting period, while annual fees for member libraries increased by 5%, the number of e-books and digital audiobooks available to all MontanaLibrary2Go registered users increased by 8% from 28,410 in the FY14 LSTA reporting period to 30,748 total copies in the FY15 LSTA reporting period. This illustrates that, in addition to having access to an existing collection valued at over one million dollars, members saw a collective value increase in this reporting period alone that exceeded the value of their individual contributions. The number of Montanans making use of MontanaLibrary2Go increased during this reporting period, as did their level of activity. Circulation (number of checkouts) increased by 15%, from 749,996 in the FY14 LSTA reporting period to 862,563 in the FY15 LSTA reporting period. During the reporting period, 13,207 new accounts were created for MontanaLibrary2Go. The total number of library patrons registered for MontanaLibrary2Go user accounts increased by 17%, from 63,365 in the FY14 LSTA reporting period to 73,889 in the FY15 LSTA reporting period.</p>
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new</p>	<p>FY2012</p>	<p>\$1,000</p>	<p>0.25 FTE</p>	<p>MARC records purchased through OCLC:</p>	<p>665</p>	<p>The consortium paid for OCLC MARC records so that patrons could easily discover e-content through their local library catalogs. This creates another access point to the collection and a more seamless process for the patron.</p>

resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.						
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2012		0.25 FTE	MontanaLibrary2Go new patrons:	60,064	
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds)	MontanaLibrary2Go new patrons:	16,921	51,057 total registered MTLibrary2Go patrons
2.1. Continue and extend statewide e-content purchase programs to cut	FY2014		0.25 FTE (Statewide	MontanaLibrary2Go new patrons:	12,305	63,365 total registered MontanaLibrary2Go patrons

<p>costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>			<p>Projects Librarian, paid with state funds)</p>			
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>FY2015</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>MontanaLibrary2Go new patrons:</p>	<p>13,207</p>	
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new</p>	<p>FY2012</p>		<p>0.25 FTE</p>	<p>New items added to MontanaLibrary2Go:</p>	<p>26,675</p>	<p>A total of 20,314 items were available in MontanaLibrary2Go at the end of this reporting period, resulting in a greater selection for patrons and a greater return on investment for participating libraries.</p>

resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.						
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds); \$179,015 non-state match for content	New items added to MontanaLibrary2Go:	4,458	A total of 22,539 copies of ebook and audiobook titles were available in the shared collection at the end of this reporting period. “When I pay our MontanaLibrary2Go bill, I know I am buying WAY MORE than just access to the materials. We are also getting top-notch professionals to do the selection and acquisition of those materials. And I am so grateful that you do this for all of us. Thank you selection committee!” (Dillon Public Library staff)
2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.	FY2014	\$2,164.75	0.25 FTE (Statewide Projects Librarian, paid with state funds)	MSL contributed some LSTA funding toward the annual content budget for MontanaLibrary2Go during this period. Total new items added to MontanaLibrary2Go through both LSTA and membership fees:	8,154	30,693 items available in the shared collection at the end of this reporting period.
2.1. Continue and extend statewide e-content purchase programs to cut	FY2015		0.25 FTE (Statewide	Total new items added to MontanaLibrary2Go	7,510	

<p>costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>			<p>Projects Librarian, paid with state funds)</p>	<p>through membership fees:</p>		
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>FY2013</p>		<p>0.25 FTE</p>	<p>Number of technical support requests answered:</p>	<p>264</p>	
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new</p>	<p>FY2012</p>	<p>\$11,622</p>	<p>0.25 FTE</p>	<p>MontanaLibrary2Go Local was a pilot developed to expand and diversify the downloadable ebook collection available to the MontanaLibrary2Go consortium, to facilitate ebook content creation in libraries, and to provide</p>		<p>A survey distributed to MontanaLibrary2Go participating libraries in May 2013 indicated that library staff wanted to make additional content, particularly content with a regional emphasis, available to their patrons. This content would include locally created or published e-books, as well as titles from small- to mid-level publishers and academic presses. The setup of the Adobe Content Server was the first step toward being able to host this local content.</p>



<p>resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>				<p>a platform for locally hosting content that the consortium could acquire or purchase outright, rather than license through a vendor. This funding covered the licensing and set up of an Adobe Content Server for one year.</p>		
<p>2.1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.</p>	<p>FY2013</p>	<p>\$1,702.79</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>The MontanaLibrary2Go Selection Committee decided that the scope of the MontanaLibrary2Go Local e-content pilot collection should be limited to titles of state or regional interest. The MontanaLibrary2Go selection procedure was revised to include local author donations, which are sent on a monthly basis to that month’s selector who evaluates whether the title is appropriate for the collection. The selection team will then review before the title is added to the collection. MSL staff worked on the website infrastructure, patron authentication, and the Adobe Content Server (ACS) upgrade during this time.</p>		<p>The Selection Committee’s new procedures for reviewing local content helps guide acquisition choices in this new area of electronic resources collection development.</p>
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and</p>	<p>FY2012</p>	<p>\$21,105.00</p>	<p>0.5 FTE funded through LSTA</p>			

<p>improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>					
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	<p>FY2013</p>	<p>\$58,952.38</p>	<p>1 FTE (Montana Memory Project Director); in-kind match = 100 hours contributing library staff time</p>	<p>LSTA funded the salary, technology infrastructure, and travel for the MMP Director position.</p>	<p>The MMP Director established a formal partnership with the Mountain West Digital Library (MWDL). The MMP content is harvested by their aggregation services and MMP content is searchable on their website. The MWDL is a Service Hub of the Digital Public Library of America (DPLA) and our MMP content is also now available on this national website.</p>
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	<p>FY2014</p>	<p>\$84,571</p>	<p>2 FTE</p>	<p>LSTA funded the salary, technology infrastructure, and travel for the MMP Director position. During this reporting period, a temporary technical assistant was hired on contract to provide support to contributing institutions on the use of MMP related programs, including CONTENTdm’s Project Client; provide training and advice on adding images, objects, and</p>	

				<p>metadata to collections and on creating Dublin Core metadata records for digital items; update the MMP webpage to create new collections, new contributing institutions, lesson plans and other relevant content; post regularly to the MMP Social media sites; and complete other technical and training support duties as directed by the MMP Director.</p>		
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	FY2012		0.5 FTE	<p>MMP staff presented workshops and webinars introducing librarians to the tools and techniques for creating digital collections and provided project support and consultation for collections. Presentations or training sessions were offered in Great Falls, Augusta, Helena, Chico, Butte, Dillon, Billings, Forsyth, Choteau and Polson. Trainings and presentations were from 1 - 3 hours in length and attendees came from all parts of the state. Topics covered included introducing the MMP, CONTENTdm software, a joint presentation with the MT Women in Agriculture Oral</p>	165	<p>Attendees gained the skills they needed to contribute new collections to the MMP.</p>

				<p>Histories project, historical photographs from the Dillon and Butte areas, historical college or high school yearbooks from Helena, Billings and Sidney, and local newspapers from Malta and Sidney. Number of presentations:</p>		
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	FY2013		<p>1 FTE (Montana Memory Project Director)</p>	<p>MMP staff presented trainings and workshops introducing the MMP as a community resource, explaining how to contribute collections, and how to collaborate with other organizations to create collections. Number of MMP presentations:</p>	46	<p>Attendees gained the skills they needed to contribute new collections to the MMP.</p>
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	FY2014		<p>2 FTE</p>	<p>MMP staff presented trainings and workshops introducing the MMP as a community resource, explaining how to contribute collections, and how to collaborate with other organizations to create collections. Number of MMP presentations:</p>	56	<p>Attendees gained the skills they needed to contribute new collections to the MMP.</p>
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online</p>	FY2015		<p>1</p>	<p>MMP staff presented trainings and workshops introducing the MMP as a community resource,</p>	53	

resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.				explaining how to contribute collections, and how to collaborate with other organizations to create collections. Number of MMP presentations:		
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2012		0.5 FTE	Number of training attendees:	1670	Attendees gained the skills they needed to contribute new collections to the MMP.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013		1 FTE (Montana Memory Project Director)	Number of training attendees:	412	Attendees gained the skills they needed to contribute new collections to the MMP.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for	FY2014		2 FTE	Number of training attendees:	840	Attendees gained the skills they needed to contribute new collections to the MMP.

MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.						
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2015		1	Number of training attendees:	318	
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013		1 FTE (Montana Memory Project Director)	Number of MMP outreach visits:	38	As a result of meetings between the MMP Director and potential institutional partners, 13 new collections have been added or are currently being worked on by new partners.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2014		2 FTE	Number of MMP outreach visits:	26	Seven of the new collections came from first-time contributors, all of whom were contacted through outreach efforts.

<p>training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>						
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	<p>FY2015</p>		<p>1</p>	<p>Number of MMP outreach visits:</p>	<p>22</p>	
<p>2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.</p>	<p>FY2012</p>	<p>\$7,139.62</p>	<p>0.5 FTE</p>	<p>FY12 LSTA funds were used for 9 awards totaling \$7,139.62 to assist 5 libraries, 2 museums and 1 archive in digitizing unique collections for inclusion in the MMP: Beaverhead County Museum, the Butte Silver Bow Public Archives, Carroll College Library, Phillips County Library and the Phillips County Museum, Rocky Mountain College Library, Sidney-Richland County Library, and MSU Billings Library. Additionally, \$2,091 was</p>	<p>9</p>	<p>These new collections add greater geographic representation and increase the number of items that the public can access to learn about Montana history through the MMP website.</p>

				used to employ an intern to clean up metadata for the University of Montana - Mansfield Library collection. Number of new collections:		
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013	\$6,258.12	1 FTE (Montana Memory Project Director)	This funding paid for the costs of digitizing the materials by a central vendor. The funding recipients included 4 public libraries, 1 museum, 1 school & 1 academic library, 1 state agency library, and 1 city agency. Number of new collections:	9	These new collections add greater geographic representation and increase the number of items that the public can access to learn about Montana history through the MMP website.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2014	\$7,169	2 FTE	This funding paid for the costs of digitizing the materials by a central vendor. Number of new collections:	25	These new collections add greater geographic representation and increase the number of items that the public can access to learn about Montana history through the MMP website.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique	FY2015	\$5,101.20	1	This funding paid for the costs of digitizing the materials by a central vendor. Number of new collections:	4	



historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.						
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2012	\$2,091.00	0.5 FTE	\$2,091 was used to employ an intern to clean up metadata for the University of Montana - Mansfield Library collection. Digital collections improved:	1	Metadata standardization allows for an easier search and discovery of items on the MMP website and allows for consistent transfer to other content management platforms.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013		1 FTE (Montana Memory Project Director)	Digital collections improved:	78	The cataloguing committee created new guidelines and reviewed metadata requirements in fall 2013. The new basic metadata requirements were applied to the existing collections and collection search results have vastly improved.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This	FY2012	\$8,732.50	0.5 FTE	FY12 LSTA funds were also used during this period to pay for the CONTENTdm annual subscription and the statewide Digital Archive subscription that provides long term	178	Subsidizing the cost of the content management software and digital archive software and maintaining the website allowed libraries to create and share digital content online that they may otherwise not have the financial resources or staff time and expertise to share. The statewide platform also allowed that local

will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.				preservation of master images. Number of collections hosted on MMP website:		content to be exposed to a wider audience that it would have otherwise.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013	\$19,030.58	1 FTE (Montana Memory Project Director); \$11,808.58 state match for software	This funding was used during this period to pay for the CONTENTdm annual subscription and the statewide Digital Archive subscription which provides long term preservation of master images Number of collections hosted on MMP website:	78	The out-of-the-box CONTENTdm webpage design lacked a friendly user interface. This past year new front pages were designed and published. These pages organize the vast array of content into format types to make content easier to find.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2014	\$11,030	2 FTE	This funding was used during this period to pay for the CONTENTdm annual subscription and the statewide Digital Archive subscription which provides long term preservation of master images Number of collections hosted on MMP website:	103	Subsidizing the cost of the content management software and digital archive software and maintaining the website allowed libraries to create and share digital content online that they may otherwise not have the financial resources or staff time and expertise to share. The statewide platform also allowed that local content to be exposed to a wider audience that it would have otherwise.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection,	FY2015	\$17,649.00	1	This funding was used during this period to pay for the CONTENTdm annual subscription and the statewide Digital Archive subscription which provides long term preservation of master images Number	48	

arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.				of collections hosted on MMP website:		
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2012		0.5 FTE	Number of contributing institutions:	161	Subsidizing the cost of the content management software and digital archive software and maintaining the website allowed libraries to create and share digital content online that they may otherwise not have the financial resources or staff time and expertise to share. The statewide platform also allowed that local content to be exposed to a wider audience that it would have otherwise.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013		1 FTE (Montana Memory Project Director)	Number of contributing institutions:	38	The number of contributing institutions increased by 27%.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2014		2 FTE	Number of contributing institutions:	45	

digitization. LSTA will also provide high-quality digitization equipment for libraries to use.						
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2015		1	Number of contributing institutions:	48	
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2012		0.5 FTE	Number of images hosted on site:	2,069,128	Subsidizing the cost of the content management software and digital archive software and maintaining the website allowed libraries to create and share digital content online that they may otherwise not have the financial resources or staff time and expertise to share. The statewide platform also allowed that local content to be exposed to a wider audience that it would have otherwise.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013		1 FTE (Montana Memory Project Director)	Number of images added to MMP:	254,762	The number of items in the MMP increased by 66%.

high-quality digitization equipment for libraries to use.						
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2014		2 FTE	Number of images hosted on site:	860,164	
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2015		1	Number of images hosted on site:	707,964	A newspaper collection was removed from the MMP during this period and transferred to a separate platform.
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2013		1 FTE (Montana Memory Project Director)	Number of images added to MMP:	254,762	The number of items in the MMP increased by 66%.

high-quality digitization equipment for libraries to use.						
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2014		2 FTE	Number of images added to MMP:	104,402	
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2015		1	Number of images added to MMP:		
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide	FY2014		2 FTE	Number of website visits during reporting period:	124,769	

high-quality digitization equipment for libraries to use.						
2.2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.	FY2015	2306 other MMP expenses (equipment, printing, MWDL membership)	1	Number of website visits during reporting period:	174,430	At the end of this reporting period, the number of followers for the MMP's Facebook page had increased by 49%, from 2,578 to 3,852 followers. On Twitter, the MMP now has 184 followers. This has resulted in increased awareness and use of the MMP website. The number of MMP web sessions increased during this reporting period by 8.98%, to 174,430 sessions, and the number of users increased by 12.86%, to 118,050 unique users.
2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.	FY2012	\$32,500.00	0.25 FTE	\$32,000 in FY12 LSTA provided one year of access to a unique, customizable instance of EBSCO Discovery Service for all Montana libraries. Locations served:	800	This contract provided access to a customizable discovery tool at no cost to libraries. It enabled libraries to test the discovery tool and to create a one-stop search tailored to the needs of their research communities.
2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials	FY2013	\$16,250	0.25 FTE (Statewide Projects Librarian, paid with state funds); \$171,248 state match for databases	This funding provided one year of access to a unique, customizable instance of EBSCO Discovery Service for all Montana libraries. Locations served:	800	This contract provided access to a customizable discovery tool at no cost to libraries. It enabled libraries to test the discovery tool and to create a one-stop search tailored to the needs of their research communities.

<p>to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>						
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2014</p>	<p>\$16,250</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>This funding provided one year of access to a unique, customizable instance of EBSCO Discovery Service for all Montana libraries. Locations served:</p>	<p>800</p>	<p>This contract provided access to a customizable discovery tool at no cost to libraries. It enabled libraries to test the discovery tool and to create a one-stop search tailored to the needs of their research communities.</p>
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2015</p>	<p>\$32,000.00</p>	<p>0.25 FTE Statewide Projects Librarian</p>	<p>This funding provided one year of access to a unique, customizable instance of EBSCO Discovery Service for all Montana libraries. Locations served:</p>	<p>800</p>	
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for</p>	<p>FY2013</p>	<p>\$5,000</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Records representing the MT Natural Heritage Program Field Guide and MT Geographic Information Systems</p>	<p>6,434</p>	<p>Access points to MT resources have increased as library patrons are able to search across records for MT content</p>



<p>MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>				<p>Data List collections created and maintained by the MSL Natural Heritage Program and Geographic Information divisions were added to all Discover It profiles during this period. Number of records added to statewide EDS:</p>		
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2012</p>		<p>0.25 FTE</p>	<p>Number of EDS training sessions</p>	<p>40</p>	<p>Attendees learned how to customize their EDS profiles to better meet the needs of their communities.</p>
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2013</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Number of EDS training sessions:</p>	<p>13</p>	<p>Attendees learned how to customize their EDS profiles to better meet the needs of their communities.</p>

<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2014</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Number of EDS training sessions:</p>	<p>na</p>	<p>Attendees learned how to customize their EDS profiles to better meet the needs of their communities.</p>
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2014</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Number of records added to statewide EDS:</p>	<p>0</p>	
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials</p>	<p>FY2012</p>		<p>0.25 FTE</p>	<p>Number of EDS training attendees:</p>	<p>329</p>	<p>Attendees learned how to customize their EDS profiles to better meet the needs of their communities.</p>

<p>to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>						
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2013</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Number of EDS training attendees:</p>	<p>117</p>	<p>Attendees learned how to customize their EDS profiles to better meet the needs of their communities.</p>
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2012</p>		<p>0.25 FTE</p>	<p>Number of EDS search sessions:</p>	<p>202,147</p>	
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for</p>	<p>FY2013</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Number of EDS search sessions:</p>	<p>69,069</p>	<p>Discover It use in libraries increased by 22%.</p>

<p>MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>						
<p>2.3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.</p>	<p>FY2014</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Number of EDS search sessions:</p>	<p>76,508</p>	<p>EDS usage increased by 9.7%.</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2012</p>	<p>\$181,310.00</p>	<p>4 FTE (2.34 paid with LSTA and 1.66 from member fees).</p>	<p>MSC staff is responsible for web development, installing and maintaining hardware, installing and updating software, administrative support, database management, new library implementation, providing technical support and training for new libraries, and training member library staff to use MSC tools.</p>	<p>33,780</p>	<p>Participating libraries saved staff time on systems work that the MSC staff covers on their behalf. Participating library staff gained knowledge about using the ILS software and about copy cataloging.</p>

				Number of help requests answered:		
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	FY2013	\$172,150	4 FTE (2.34 paid with LSTA and 1.66 from member fees); non-state match = \$277,558 for technology infrastructure and personnel; in-kind match = 400 hours member library staff time	MSC staff facilitated the growth and development of the statewide catalog, evaluated and implemented new products and updates, negotiated licenses and fees, and provided technical support to MSC members. Number of help requests answered:	17,000	Participating libraries saved staff time on systems work that the MSC staff covers on their behalf. Participating library staff gained knowledge about using the ILS software and about copy cataloging.
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	FY2014	\$176,254	5 FTE for MSC: 2.34 paid with LSTA funds and 2.66 paid from MSC membership fees.	MSC staff facilitated the growth and development of the statewide catalog, evaluated and implemented new products and updates, negotiated licenses and fees, and provided technical support to MSC members. Number of help requests answered:	1,890	Participating libraries saved staff time on systems work that the MSC staff covers on their behalf. Participating library staff gained knowledge about using the ILS software and about copy cataloging.
2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.	FY2015	\$184,912.62	5 FTE for MSC: 2.34 paid with LSTA funds and 2.66 paid from MSC membership fees.	MSC staff facilitated the growth and development of the statewide catalog, evaluated and implemented new products and updates, negotiated licenses and fees, and provided technical support to MSC members. Number of help requests answered:	1,890	

<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2012</p>		<p>4 FTE (2.34 paid with LSTA and 1.66 from member fees).</p>	<p>Number of MSC training sessions offered:</p>	<p>130</p>	<p>Participating library staff gained knowledge about using the ILS software and about copy cataloging.</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2013</p>		<p>4 FTE (2.34 paid with LSTA and 1.66 from member fees).</p>	<p>Number of MSC training sessions offered:</p>	<p>44</p>	<p>Participating library staff gained knowledge about using the ILS software and about copy cataloging.</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2014</p>		<p>5 FTE</p>	<p>Number of MSC training sessions offered:</p>	<p>15</p>	<p>Participating library staff gained knowledge about using the ILS software and about copy cataloging.</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2015</p>		<p>5 FTE</p>	<p>Number of MSC training sessions offered:</p>	<p>34</p>	

<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2012</p>		<p>4 FTE (2.34 paid with LSTA and 1.66 from member fees).</p>	<p>Number of MSC training attendees:</p>	<p>1427</p>	<p>Participating library staff gained knowledge about using the ILS software and about copy cataloging.</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2013</p>		<p>4 FTE (2.34 paid with LSTA and 1.66 from member fees).</p>	<p>Number of MSC training attendees:</p>	<p>423</p>	<p>Participating library staff gained knowledge about using the ILS software and about copy cataloging.</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2014</p>		<p>5 FTE</p>	<p>Number of MSC training attendees:</p>	<p>182</p>	<p>Participating library staff gained knowledge about using the ILS software and about copy cataloging.</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2015</p>		<p>5 FTE</p>	<p>Number of MSC training attendees:</p>	<p>442</p>	

<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2012</p>	<p>\$54,850.16</p>	<p>4 FTE (2.34 paid with LSTA and 1.66 from member fees).</p>	<p>This funding was used to pay for one-time vendor startup fees and data migration fees for MSC new libraries. Number of libraries added to MSC:</p>	<p>38</p>	<p>Increased access to library materials for 15,486 registered patrons of new MSC libraries</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2013</p>	<p>\$16,344</p>	<p>4 FTE (2.34 paid with LSTA and 1.66 from member fees).</p>	<p>Each year, libraries across the state are invited to apply to join the MSC. LSTA funds are available to help libraries with start-up costs. Number of libraries added to the MSC:</p>	<p>3</p>	<p>Increased access to library materials for patrons of new MSC libraries</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2014</p>	<p>\$1,900</p>	<p>5 FTE</p>	<p>Each year, libraries across the state are invited to apply to join the MSC. LSTA funds are available to help libraries with start-up costs. Number of libraries added to the MSC:</p>	<p>2</p>	<p>Increased access to library materials for patrons of new MSC libraries</p>
<p>2.4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.</p>	<p>FY2015</p>	<p>\$39,667.00</p>	<p>5 FTE</p>	<p>Each year, libraries across the state are invited to apply to join the MSC. LSTA funds are available to help libraries with start-up costs. Number of libraries added to the MSC:</p>	<p>7</p>	<p>Increased access to library materials for patrons of new MSC libraries</p>



<p>2.5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.</p>			<p>Obviously this was done in a big way. Which other objective should I refer to here?</p>			
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2012</p>	<p>\$16,334.00</p>	<p>0.25 FTE</p>	<p>The Statewide Projects Librarian administered the OCLC Group Services project. This funding covered 0.25 FTE.</p>		
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2013</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds); state match = \$98,886; non-state match = \$369,730; in-kind match = 45 hours member library staff time</p>	<p>Enrolled libraries have access to discovery, cataloging, and interlibrary loan tools, with costs based on a formula that keeps OCLC affordable for all libraries. The Group Services contract includes access to CatExpress, Connexion, FirstSearch, WorldCat, and WorldShare Interlibrary Loan. The Statewide Projects</p>		

<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2014</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Librarian administered the OCLC Group Services project.  Enrolled libraries have access to discovery, cataloging, and interlibrary loan tools, with costs based on a formula that keeps OCLC affordable for all libraries. The Group Services contract includes access to CatExpress, Connexion, FirstSearch, WorldCat, and WorldShare Interlibrary Loan. The Statewide Projects Librarian administered the OCLC Group Services project.</p>	
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2015</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Enrolled libraries have access to discovery, cataloging, and interlibrary loan tools, with costs based on a formula that keeps OCLC affordable for all libraries. The Group Services contract includes access to CatExpress, Connexion, FirstSearch, WorldCat, and WorldShare Interlibrary Loan. The Statewide Projects Librarian administered the OCLC Group Services project.</p>	<p>Interlibrary loan transactions through OCLC decreased by 3% from the FY14 LSTA reporting period to the current reporting period. However, ILL requests made by patrons in MSC libraries that share user privileges continued to increase, probably because of the simpler "place hold" capability within the Shared Catalog. In this five-year period, MSC library patrons increased their holds on library materials from other MSC libraries by 7.37% (from 271,627 in 2012 to 291,662 in 2016). The consortium also increased the number of libraries sharing items with one another via direct patron holds by 30% (from 61 libraries to 79 libraries). This suggests that the MSC is meeting its goal of increasing access to materials for a growing portion of Montana citizens through their local libraries. The Montana Shared Catalog consortium's project to streamline its configuration and circulation</p>

						<p>policies during this reporting period has resulted in the MSC staff being able to work more efficiently to meet the needs of MSC member libraries, as well as to prepare for any future system migration and to position the consortium to utilize new technologies by reducing the complexity of the shared system. During this three-year system reorganization project, staff identified and removed nearly 1,000 unused policies and unused reports from the system. As a result of this system reorganization, various processes done by MSC staff are now much faster: • Time to add a new library from 120 to 50 hours (58% decrease) • Adding a new branch from 20 to 8 hours (60% decrease) • Adding a library to a sharing group from 20 to 6 hours (70% decrease) • Changing a library to eliminate fines from 5 to 0.5 hours (90% decrease) • Changing circulation rules from 2 to 0.5 hours (75% decrease) MSC staff can now utilize the time saved in these tasks to respond more quickly to ongoing support requests, to develop more training materials to help members use the system effectively, and to research possibilities for further increasing the usefulness and efficiency of the shared system.</p>
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2012</p>	<p>\$59,736.00</p>	<p>0.25 FTE</p>	<p>This funding was used to offset costs to participating libraries for access to OCLC cataloging and interlibrary loan tools. Number of libraries enrolled to receive discounted access to OCLC Group Services cataloging and interlibrary loan tools:</p>	<p>1045</p>	<p>The OCLC cost share formula implemented by MSL allows libraries of all kinds to continue to participate in the statewide OCLC contract and make use of cataloging and interlibrary loan tools. The cost for libraries is much less through the statewide license than if the library purchased these services individually.</p>

<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2013</p>	<p>\$62,277</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>This funding was used to offset costs to participating libraries for access to OCLC cataloging, interlibrary loan, and authentication tools. Number of libraries enrolled to receive discounted access to OCLC Group Services:</p>	<p>251</p>	<p>The OCLC Statewide Group Services contract made more than a dozen cataloging and resource sharing tools available at a discounted rate to 251 public, academic, school, and special libraries and branches that were enrolled during this period.</p>
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2014</p>	<p>\$89,741</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>This funding was used to offset costs to participating libraries for access to OCLC cataloging, interlibrary loan, and authentication tools. Number of libraries enrolled to receive discounted access to OCLC Group Services:</p>	<p>272</p>	<p>The OCLC Statewide Group Services contract made more than a dozen cataloging and resource sharing tools available at a discounted rate to public, academic, school, and special libraries and branches that were enrolled during this period.</p>
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to</p>	<p>FY2015</p>	<p>\$75,380.00</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>This funding was used to offset costs to participating libraries for access to OCLC cataloging, interlibrary loan, and authentication tools. Number of libraries enrolled to receive discounted access to OCLC Group Services:</p>	<p>273</p>	

demonstrate possible solutions to this fulfillment issue.						
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2012		0.25 FTE	Number of original catalog records added to WorldCat:	8,336	Montana library staff added records to WorldCat, which increased access to and awareness of those holdings through the WorldCat interface. Original catalog records created access to unique items for the first time and made them discoverable online.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of original catalog records added to WorldCat:	3,140	Montana library staff added records to WorldCat, which increased access to and awareness of those holdings through the WorldCat interface. Original catalog records created access to unique items for the first time and made them discoverable online.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between	FY2014		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of original catalog records added to WorldCat:	2,933	Montana library staff added records to WorldCat, which increased access to and awareness of those holdings through the WorldCat interface. Original catalog records created access to unique items for the first time and made them discoverable online.

libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.						
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2015		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of original catalog records added to WorldCat:	2,000	
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2012		0.25 FTE	Number of copy catalog records updated in WorldCat:	466,590	Montana library staff added records to WorldCat, which increased access to and awareness of those holdings through the WorldCat interface.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of copy catalog records updated in WorldCat:	78,980	Montana library staff added records to WorldCat, which increased access to and awareness of those holdings through the WorldCat interface.

methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.						
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2014		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of copy catalog records updated in WorldCat:	89,023	Montana library staff added records to WorldCat, which increased access to and awareness of those holdings through the WorldCat interface.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2015		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of copy catalog records updated in WorldCat:	209,155	
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new	FY2012		0.25 FTE	Number of ILL requests filled (borrowing):	53,071	Montana library staff filled user requests through interlibrary borrowing and lending, which reduced duplication of collections and saved money on collection development at the local level.

options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.						
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of ILL requests filled (borrowing):	49,758	Montana library staff filled user requests through interlibrary borrowing and lending, which reduced duplication of collections and saved money on collection development at the local level.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2014		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of ILL requests filled (borrowing):	46,859	Montana library staff filled user requests through interlibrary borrowing and lending, which reduced duplication of collections and saved money on collection development at the local level.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what	FY2015		0.25 FTE (Statewide Projects Librarian,	Number of ILL requests filled (borrowing):	44,099	



library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.			paid with state funds)			
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2012		0.25 FTE	Number of ILL requests filled (lending):	194,449	Montana library staff filled user requests through interlibrary borrowing and lending, which reduced duplication of collections and saved money on collection development at the local level.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2013		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of ILL requests filled (lending):	50,420	Montana library staff filled user requests through interlibrary borrowing and lending, which reduced duplication of collections and saved money on collection development at the local level.
2.6. Design and expand projects to demonstrate how materials can get to	FY2014		0.25 FTE (Statewide	Number of ILL requests filled (lending):	50,201	Montana library staff filled user requests through interlibrary borrowing and lending, which

<p>a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>			<p>Projects Librarian, paid with state funds)</p>			<p>reduced duplication of collections and saved money on collection development at the local level.</p>
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2015</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>Number of ILL requests filled (lending):</p>	<p>50,000</p>	
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2012</p>	<p>\$16,334.00</p>	<p>0.25 FTE</p>	<p>The Statewide Projects Librarian administered the courier project. This funding covered 0.25 FTE.</p>		

<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2013</p>	<p>No LSTA invested in the courier project from this award period.</p>	<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>The Statewide Projects Librarian administered the courier project.</p>		
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.</p>	<p>FY2014</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>The Statewide Projects Librarian administered the courier project.</p>		
<p>2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to</p>	<p>FY2015</p>		<p>0.25 FTE (Statewide Projects Librarian, paid with state funds)</p>	<p>The Statewide Projects Librarian administered the courier project.</p>		<p>Access to a regular courier service reduces the cost of resource sharing of physical materials between libraries. The average cost per item, based on contract value and estimated items sent during this reporting period, was \$0.32. This is approximately a 90% reduction in cost compared to standard shipping via mail. This cost savings to libraries means that libraries can devote more of their budget to meeting other funding priorities.</p>

demonstrate possible solutions to this fulfillment issue.						
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2012	\$10,372.68	0.25 FTE	This funding was used to assist libraries with startup costs for joining the courier service. Number of libraries that joined the courier:	43	In May 2013, a survey was distributed to staff at libraries participating in the courier consortium. 67% responded that the courier service made a noticeable impact in their library circulation numbers and delivery savings; 56% were also tentatively interested in the possibility of expanding courier service both within MT and regionally. Comments provided on the survey also indicated that there continued to be a wish to have MSL assist with the current courier effort by providing centralized communication tools, collecting consistent and standardized statistics, and participating in discussions regarding contracts and service expansion and development, among other roles and responsibilities.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2014	\$7,839	0.25 FTE (Statewide Projects Librarian, paid with state funds)	This funding was used to offset costs to libraries participating in the courier service. Number of libraries that received this discount:	19	55 libraries were served through the 19 drop site libraries that were able to participate at discounted service rates.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop	FY2015	\$5,765.50	0.25 FTE (Statewide Projects Librarian, paid with state funds)	This funding was used to offset costs to libraries participating in the courier service. Number of libraries that received this discount:	18	During this reporting period, the courier service served 54 library locations through 18 drop sites that signed service agreements with Critelli Couriers. The Montana State Library holds the contract with Critelli.

methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.						
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2012		0.25 FTE	Number of items circulating via courier per month:	17,060	
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.	FY2014		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of crates circulating via courier per month:	685	The proven value of the courier network to sharing group libraries supports continued efforts to strengthen the network and keep costs affordable for any Montana libraries that are interested in sharing physical materials for the benefit of their patrons. For libraries, "affordable" means at least being consistently more cost effective than sending via mail. Statistics indicate that volume and cost per item factor into affordability, and that a flat rate does not actually represent a discount for some libraries that do not send and receive a volume of materials on the level of the MSC sharing group libraries.
2.6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new	FY2015		0.25 FTE (Statewide Projects Librarian, paid with state funds)	Number of items circulating via courier per month:	16,265	

options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.						
Goal 3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL’s number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.		\$ 181,700.46				
3.1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.	FY2012		See goal 2.4			
3.2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]			See goal 2.1			
3.3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.	FY2012		See goal 2.2			
3.4. Continue to develop programming materials and tools for libraries to use and continue to	FY2012	\$10,000.00	0.125 FTE for early literacy position	This amount funded early literacy staff hours.	12	Since launching the Ready2Read program in 2009, reported attendance in children’s programming statewide has increased by 16%

<p>partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>				<p>Number of Ready2Read training events offered:</p>		<p>(from 158,625 in 2008 to 183,865 in 2012) and the number of available children’s programs has increased by 44% (from 6,584 in 2008 to 9,497 in 2012).</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2013</p>	<p>\$10,000.00</p>	<p>0.125 FTE for early literacy position; \$112 state match; \$7,900 non-state match</p>	<p>This amount funded early literacy staff hours. Number of Ready2Read training events offered:</p>		<p>Since launching the Ready2Read program in 2009, reported attendance in children’s programming statewide has increased over 21% (from 158,625 in 2008 to 193,456 in 2013) and the number of available children’s programs has increased by over 53% (from 6,584 in 2008 to 10,127 in 2013).</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2014</p>	<p>\$10,000.00</p>	<p>0.125 FTE for early literacy position</p>	<p>This amount funded early literacy staff hours. Number of Ready2Read training events offered:</p>		<p>In 2015, the State Library conducted its first-ever assessment of summer reading programs in the state. 74 Montana libraries responded to the online survey. Findings indicated that summer reading is an important library service in communities statewide, with 97% of survey respondents saying that they offer a summer reading program. Survey respondents were asked what type of summer reading program they offered, and were encouraged to check all that apply since many libraries offer multiple versions of a summer reading program targeted at different audiences. Results indicated that 74% of respondents offer an early literacy program; 98% offer a children’s summer reading program; 63% offer a teen summer reading</p>

						program; and 37% offer a summer reading program specifically for adults.
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2015	\$28,675.90	0.125 FTE for early literacy position			
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2012		0.125 FTE	Number of Ready2Read training (online and in-person sessions, excluding the Rendezvous) attendees:	479	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books	FY2012	\$4,007.00	0.125 FTE	This funding supported the Ready2Read Rendezvous. This event was centered on early literacy training to help public library staff deliver programming for public libraries to serve children ages 0-7. Number of attendees:	88	To evaluate the Rendezvous, attending librarians were required to complete a significant year-long project putting into practice something they learned. The only parameters for the project were: a) the projects had to be a long-term effort, not something that could be easily implemented; b) the projects had to utilize information that had been gained as a result of attending the Rendezvous; and c) the projects had to expand the library’s current early literacy efforts and reach children from birth-5 years old. Libraries had to design their projects and outline goals,



<p>and other items to be used for local programming efforts.</p>						<p>objectives, and tasks associated with each objective.</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2013</p>	<p>\$15,504.42</p>	<p>0.125 FTE</p>	<p>This funding supported the Ready2Read Rendezvous. Training was offered at the 2014 Rendezvous featuring developmentally appropriate play spaces in libraries and how to integrate play in library programming and space; how to integrate early literacy and developmental information into storyhours for mixed ages; and how to position your library as a center of the community for youth programming. Number of attendees:</p>	<p>38</p>	<p>To evaluate the Rendezvous, attending librarians were required to complete a significant year-long project putting into practice something they learned. The only parameters for the project were: a) the projects had to be a long-term effort, not something that could be easily implemented; b) the projects had to utilize information that had been gained as a result of attending the Rendezvous; and c) the projects had to expand the library’s current early literacy efforts and reach children from birth-5 years old. Libraries had to design their projects and outline goals, objectives, and tasks associated with each objective. Final projects include complete re-designs of children’s areas, community partnerships, ongoing early literacy training in communities, and extensive programming overhauls. Examples of community partnerships include Missoula Public Library’s “pop-up museum” facilitated by SpectrUM Discovery Center, a program of the University of Montana, which places 3 hands-on science activities within the children’s area; Missoula Public Library’s partnership with the local food bank which brings healthy snacks to children attending summer library activities; Blackfeet Community College – Medicine Spring Library’s “Books and Babies” program coordinated with the community health center and the local Head Start to extend their outreach to new audiences; and Glendive Public Library’s partnerships with the local Health Department and medical center to provide newborn babies with a board book and a guide for new parents (including “the importance of the “fabulous five” – reading, singing, playing, writing, and talking – and several rhymes with finger plays). Glendive has strengthened its partnership with the Health</p>

						<p>Department by inviting a registered nurse to attend one storytime program each month to answer parents’ questions, take babies’ height and weight, and make referrals to other helpful resources.</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2015</p>	<p>\$15,294.14</p>	<p>0.125 FTE for early literacy position</p>	<p>This funding supported the Ready2Read Rendezvous. Training was offered at the 2015 Rendezvous featuring developmentally appropriate play spaces in libraries and how to integrate play in library programming and space; how to integrate early literacy and developmental information into storyhours for mixed ages; and how to position your library as a center of the community for youth programming. Number of attendees:</p>	<p>45</p>	<p>Following the Ready 2 Read Rendezvous, a total of 12 libraries incorporated Countdown to Kindergarten programs in their libraries during this reporting period. These include large libraries such as the Bozeman Public Library and ImagineIf Libraries in Kalispell, but also small libraries such as Glacier County Library in Cut Bank, which serves the Blackfeet reservation, and the James E. Shanley Tribal Library which serves the Fort Peck reservation. An outcome based on attendance at the Ready 2 Read Rendezvous from ImagineIf Libraries in Flathead County, Montana: "We did implement an Early Literacy Kit project with our City-County Health Department. The idea for the kit came out of Ready 2 Read Rendezvous 2015; each kit contains a board book, egg shaker, information about the texting program, a mini poster with early literacy tips, a library card, and days and times of all of our library programs. The kits have been a huge success so far. We trained home visiting nurses on early literacy practices and they bring the information to their clients in their homes or in the case of WIC, during office visits. "In the three months since we started the program, we have given out 140 kits to clients through WIC (Women, Infants and Children) and the Healthy Montana Families program, which sends nurses to visit clients in their homes and teach them about healthy parent-child relationships, safety and early learning. The feedback from Health Department staff and kit recipients has been overwhelmingly positive, with 100% of recipients agreeing with the statement: "After practicing the skills from the</p>

					<p>library kit, I feel prepared to help my baby or child be a successful person and arrive at school ready to learn. "We have also collected comments from recipients and learned that the kits can have a major impact on people's lives. Here are a few quotes that we received thus far: 'My baby was born in September. I never thought to start reading to him so soon. So glad to have books to start reading to him.' 'This is a book I wanted to purchase for my child that I couldn't afford, and now we have it.' 'I'm excited to read the book to my new baby when he arrives.' 'I'm able to continue teaching my son in my native language and also in English now that I have another book to read to him.' 'I'm excited to take my daughter to library; I forgot it was an option for small children.' 'We read more than one book each day now.' " Another outcome based on attendance at the Ready 2 Read Rendezvous, from Glacier County Libraries in Cut Bank, Montana (which also serves the Blackfeet reservation): "We did incorporate many ideas from the Ready 2 Read Rendezvous and the awesome training we received there! Many of the ideas for our 'Explore IT' Bench/Wall in our children's area were adapted on a smaller scale from the training there both from Jeri with the Boston Children's Museum and from the Storyville concept. (The changeable themes with our mini market stall and the "mouse house" are 2 examples). We were so inspired! Bess always handles Story Time for the month of August, so she decided to do 'Kindergarten Kamp' for the entire month. The themes she presented were: Scissors School, Dress for Success, Lunch Time, Riding the Bus, and Friendship. We purchased little supply boxes and each week they got to add a new school supply to their box and then on the last week they took them home. We had 20 participants</p>
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						and the parents were very appreciative of the program, with new participants that had not attended Story Time before. We also had positive feedback from teachers who thought this was a wonderful idea.” Additionally, all Ready 2 Read Rendezvous participants had to attend a webinar to provide updates on their year-long projects. Each webinar had about eight attendees during which each participant shared their project and provided details as to the success they had experienced thus far and the challenges. Participants worked together to brainstorm solutions for challenges. Participants then had to provide a written project update to the Early Literacy Coordinator. Additional training needs were identified in this process (managing volunteers, working with community partners) for which later webinars were scheduled.
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2014	\$2,150		A contract consultant was hired using \$1,375 in FY13 LSTA to assist with 4 Ready2Read program development meetings; assist with planning and leading 4 trainings at the April 2014 MT Library Association conference; present 4 training webinars; planning and participating in the Rendezvous; and presenting a Summer Reading Program webinar and evaluation. Number of training events offered:	0	62 people attended.
3.4. Continue to develop programming materials and tools for libraries to use and continue to	FY2015	\$1,600.00	0.125 FTE for early literacy position	A contract consultant was hired using \$1,600 in FY15 LSTA to assist	7	

<p>partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>				<p>with Ready2Read program development meetings; assist with planning and leading trainings at the April 2015 MT Library Association conference; present training webinars; planning and participating in the Rendezvous; and presenting a Summer Reading Program webinar and evaluation. Number of training events offered:</p>		
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2012</p>	<p>\$7,630.00</p>	<p>0.125 FTE</p>	<p>MSL staff developed written materials that are accessible to parents and caregivers, even if those parents and caregivers have low literacy skills themselves. Additionally, MSL worked with an award-winning graphic designer and children’s book illustrator to develop a series of materials specific to Montana by featuring Montana animals. The animals featured on the Ready 2 Read materials include mountain lions, bison, bears, wolves, and elk. The materials encourage parents to talk, sign, play, read, and write with their young children.</p>	<p>5,000</p>	<p>Informational posters, cards, bookmarks, and magnets were developed. Each item is tremendously popular. Hospitals across the state included materials in ‘new baby’ bags. The cards and bookmarks were also distributed to Head Start programs, and each local Best Beginnings Advisory Council program distributed these materials to parents and caregivers.</p>

				Number of posters distributed in this period:		
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013	\$3,524.82	0.125 FTE	Number of Ready2Read material information items printed distributed during this reporting period:	60,000	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2014			Number of Ready2Read material information items printed distributed during this reporting period:		62
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books	FY2015	\$1,623.48	0.125 FTE for early literacy position	Number of Ready2Read material information items printed distributed during this reporting period:	15,000	

and other items to be used for local programming efforts.						
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2012	\$2,150.00	0.125 FTE	MSL contracted with a children's services librarian from Bozeman to lead online and in-person training to help Montana librarians prepare for the Summer Reading Program. Number of SRP training events offered:	12	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013	\$1,375.00		A contract consultant was hired using \$1,375 in FY13 LSTA to assist with 4 Ready2Read program development meetings; assist with planning and leading 4 trainings at the April 2014 MT Library Association conference; present 4 training webinars; planning and participating in the Rendezvous; and presenting a Summer Reading Program webinar and evaluation. Number of training events offered:	13	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long	FY2014	\$2,150		A contract consultant was hired using \$1,375 in FY13 LSTA to assist with 4 Ready2Read program development meetings; assist with	0	62 people attended.

<p>learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>				<p>planning and leading 4 trainings at the April 2014 MT Library Association conference; present 4 training webinars; planning and participating in the Rendezvous; and presenting a Summer Reading Program webinar and evaluation. Number of training events offered:</p>		
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2015</p>	<p>\$1,600.00</p>	<p>0.125 FTE for early literacy position</p>	<p>A contract consultant was hired using \$1,600 in FY15 LSTA to assist with Ready2Read program development meetings; assist with planning and leading trainings at the April 2015 MT Library Association conference; present training webinars; planning and participating in the Rendezvous; and presenting a Summer Reading Program webinar and evaluation. Number of training events offered:</p>	<p>7</p>	
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt</p>	<p>FY2012</p>	<p>\$1,100.00</p>	<p>0.125 FTE</p>	<p>Summer reading manuals for public libraries:</p>	<p>440</p>	<p>Libraries received discounted access to the Collaborative Summer Reading Program manual.</p>



and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.						
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013	\$1,100	0.125 FTE	Number of summer reading manuals distributed to public libraries:	110	Libraries received discounted access to the Collaborative Summer Reading Manual.
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2014	\$1,375		The State Library purchased summer reading manuals from the Collaborative Summer Library Program (CSLP) for all Montana libraries and branches. Number of summer reading manuals distributed to public libraries:	110	Approximately 91% of survey respondents used the Collaborative Summer Library Program manual that is provided to them from the State Library.
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community.	FY2015	\$1,375.00	0.125 FTE for early literacy position	The State Library purchased summer reading manuals from the Collaborative Summer Library Program (CSLP) for all Montana libraries and branches. Number of summer reading manuals	110	

LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.				distributed to public libraries:		
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2012	270		Summer reading public service announcements produced:	12	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013	\$270.00	0.125 FTE	Summer reading public service announcements produced:	6	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013	\$18,446.78	0.25 FTE	The MT Makers traveling makerspace pilot equips libraries with tools and resources for young patrons to experiment with technology and craft in a way that is not readily available in most communities. These	12	The programming focus was most heavily concentrated on the more traditional arts and crafts elements of the kit, as library staff reported their level of familiarity and comfort was highest in this area. 100% of reporting sites organized arts activities (4); 50% planned science-based formal programs (2); 50% planned technology programs (2); 50% planned activities with a focus on engineering (2); and 25% planned math activities (1). Library staff themselves reported

<p>of materials and purchasing books and other items to be used for local programming efforts.</p>				<p>tools come in the form of traveling kits that circulate to libraries for 8-10 weeks at a time. Number of kits created for statewide use:</p>		<p>having gained new experiences from using the technology and electronics tools in the kit, as many of the staff had never had the opportunity to use them before. The most frequently reported challenge and request was the need for additional training on more complex pieces like the programming tools such as the Arduino. In response, MSL staff offered additional “drop in” sessions and also partnered with a vendor to host a Google Hangout and cover the fundamentals of programming the Arduino.</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2013</p>	<p>\$18,446.78</p>	<p>0.25 FTE</p>	<p>The MT Makers traveling makerspace pilot equips libraries with tools and resources for young patrons to experiment with technology and craft in a way that is not readily available in most communities. These tools come in the form of traveling kits that circulate to libraries for 8-10 weeks at a time. Number of kits created for statewide use:</p>	<p>6</p>	<p>The programming focus was most heavily concentrated on the more traditional arts and crafts elements of the kit, as library staff reported their level of familiarity and comfort was highest in this area. 100% of reporting sites organized arts activities (4); 50% planned science-based formal programs (2); 50% planned technology programs (2); 50% planned activities with a focus on engineering (2); and 25% planned math activities (1). Library staff themselves reported having gained new experiences from using the technology and electronics tools in the kit, as many of the staff had never had the opportunity to use them before. The most frequently reported challenge and request was the need for additional training on more complex pieces like the programming tools such as the Arduino. In response, MSL staff offered additional “drop in” sessions and also partnered with a vendor to host a Google Hangout and cover the fundamentals of programming the Arduino.</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt</p>	<p>FY2014</p>	<p>\$4,656</p>	<p>0.25 FTE</p>	<p>The purpose of the Montana Makers traveling makerspace pilot was to create opportunities through local libraries to expose primarily school-aged Montanans to STEAM</p>	<p>6</p>	

<p>and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>				<p>(science, technology, engineering, arts, mathematics) tools and resources that are not otherwise easily accessible in most Montana communities. Additionally, library staff across the state would have the opportunity to try out maker materials before committing funds to purchase materials that would be appropriate for their communities. Number of electronic textiles kits purchased for statewide use:</p>		
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2013</p>		<p>0.25 FTE</p>	<p>Number of libraries that hosted makerspace kits:</p>	<p>21</p>	<p>“I was able to attend the Maker Space workshop and a staff member attended the STEAM story time workshop at the end of September, so we are feeling pretty comfortable with the kit and excited to start using it. I’m really excited about this opportunity and want to thank you, State Library, and IMLS for this wonderful opportunity to connect more with our patrons. There are so many things we are being encouraged to participate in right now, it is so helpful to have the kit and guidance to provide us with a solid starting point. It makes it “do-able” instead of overwhelming.” (Glacier County Library staff)</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program</p>	<p>FY2014</p>		<p>0.25 FTE</p>	<p>Number of libraries that hosted makerspace kits:</p>	<p>15</p>	<p>Of the 15 libraries that hosted makerspaces during this reporting period, eight responded that they initially wanted to host a maker kit “to increase young adult/teen programming”; six responded “to increase STEM related programming”; four responded “to provide new services and new opportunities through the</p>

<p>materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>					<p>library”; and four responded “to try out makerspace materials before purchasing.” In the evaluation, these libraries responded that they were successful in increasing STEM related programming (10 responses); providing new services (five responses); increasing community participation in library programs by attracting new users to the library (four responses); and increasing the number of programs for young adults and teens (two responses). Hosting libraries almost unanimously stated that they benefited from being able to test makerspace materials through the pilot before purchasing items for their libraries (13 responses). In the pre-hosting application, most (12) hosting libraries stated that they believed “technology” would be of greatest interest to young adults, followed by building (five), arts (four), and science (three). In the post-hosting evaluation, technology did not fare quite as well with only eight libraries stating that those tools had been the most widely used. Arts and crafts (nine) were most popular. Ten libraries responded that technology tools had been used the least, in part because pieces such as the Arduino were difficult for library staff and volunteers to understand in a short amount of time in advance of planning programs. When asked what changes they would suggest for improving the content of the maker kits, five libraries suggested “more project examples from other libraries, better documentation, and more training;” four libraries suggested that content be separated into smaller, separate kits with a more specific focus; and three libraries requested more consumable materials (paper, glue, batteries) and accessories as these expendable items became a considerable expense in sustaining programs. Libraries identified partners in their communities as being predominantly professionals or experts in a</p>
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						specific field (scientists, information technology professionals, medical professionals, engineers, and electricians, among others); or K-12 school faculty and students or student groups. Local organizations and afterschool groups such as the YMCA, 4-H, and the county extension office were also identified as program partners. Two libraries reached out directly to neighboring libraries to partner on programs or to ask for advice on planning programs.
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013		0.25 FTE	Number of programs hosted by libraries during this period that made use of the makerspace kits:	52	“I have heard many of our youth settling for mediocrity and never hitching their saddle to a distant star. They don’t believe that they are smart enough to try for things in the science and technology arena. I want them to know that their library believes in them and that we can provide resources to help them reach for the stars and be that amazing person that they are meant to be.” (Glendive Public Library) "There was enough technology to do several months’ worth of programs. We used MaKey MaKey to make a giant, foot-operated game controller and banana keyboard. The teens also made an AM radio with the Snap Circuits. Other programs using skills developed with the kit included an hour of code and 3D printing. These numbers are huge for us and clearly show that the kit was a success. We plan to continue providing DIY/maker supplies for teens throughout the school year." (Belgrade Community Library staff)
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing	FY2014		0.25 FTE	Number of programs hosted by libraries during this period that made use of the makerspace kits:	33	

of materials and purchasing books and other items to be used for local programming efforts.						
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013		0.25 FTE	Number of attendees at maker programs:	1,647	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2014		0.25 FTE	Number of attendees at maker programs:	1,254	
3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.	FY2013	\$2,082	0.5 FTE	Share Your Story was an LSTA-funded pilot that circulates portable digital audiovisual recording kits to libraries on a rotating basis. Hosting library staff is trained to use and make these tools available to record their communities' stories in audio or video format.	4	<ul style="list-style-type: none"> <li>• Previously undocumented cultural heritage from the local community is documented and shared.</li> <li>• Community awareness of library resources and programs increases.</li> <li>• Presence of library resources and programs in the community expands.</li> <li>• Project that promotes intergenerational activity generates strong turnouts/participation.</li> <li>• New patrons visit the library or make use of library services.</li> <li>• Patrons have the opportunity to learn new technologies and skills.</li> <li>• Staff feel more confident with</li> </ul>

<p>and other items to be used for local programming efforts.</p>				<p>These stories are then collected and uploaded to several locations, where appropriate: the dedicated project website, the MSL Vimeo channel, and the MT Memory Project, as well as the contributing library’s website, if desired. Number of kits provided to libraries:</p>		<p>hands-on technology training, and offer increased or more varied opportunities to library patrons. • Community partnerships are formed or expanded to assist in promoting and collect stories.</p>
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2013</p>		<p>0.5 FTE</p>	<p>Number of interviews recorded:</p>	<p>8</p>	
<p>3.4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.</p>	<p>FY2015</p>	<p>\$15,294.14</p>	<p>0.125 FTE for early literacy position</p>	<p>This funding supported the Ready2Read Rendezvous. Training was offered at the 2015 Rendezvous featuring developmentally appropriate play spaces in libraries and how to integrate play in library programming and space; how to integrate early literacy and developmental information into storyhours for mixed</p>	<p>45</p>	<p>Following the Ready 2 Read Rendezvous, a total of 12 libraries incorporated Countdown to Kindergarten programs in their libraries during this reporting period. These include large libraries such as the Bozeman Public Library and ImagineIf Libraries in Kalispell, but also small libraries such as Glacier County Library in Cut Bank, which serves the Blackfeet reservation, and the James E. Shanley Tribal Library which serves the Fort Peck reservation. An outcome based on attendance at the Ready 2 Read Rendezvous from ImagineIf Libraries in Flathead County, Montana: "We did implement an Early Literacy Kit project with our City-County Health Department. The idea for the kit</p>



				<p>ages; and how to position your library as a center of the community for youth programming. Number of attendees:</p>	<p>came out of Ready 2 Read Rendezvous 2015; each kit contains a board book, egg shaker, information about the texting program, a mini poster with early literacy tips, a library card, and days and times of all of our library programs. The kits have been a huge success so far. We trained home visiting nurses on early literacy practices and they bring the information to their clients in their homes or in the case of WIC, during office visits. "In the three months since we started the program, we have given out 140 kits to clients through WIC (Women, Infants and Children) and the Healthy Montana Families program, which sends nurses to visit clients in their homes and teach them about healthy parent-child relationships, safety and early learning. The feedback from Health Department staff and kit recipients has been overwhelmingly positive, with 100% of recipients agreeing with the statement: "After practicing the skills from the library kit, I feel prepared to help my baby or child be a successful person and arrive at school ready to learn. "We have also collected comments from recipients and learned that the kits can have a major impact on people's lives. Here are a few quotes that we received thus far: 'My baby was born in September. I never thought to start reading to him so soon. So glad to have books to start reading to him.' 'This is a book I wanted to purchase for my child that I couldn't afford, and now we have it.' 'I'm excited to read the book to my new baby when he arrives.' 'I'm able to continue teaching my son in my native language and also in English now that I have another book to read to him.' 'I'm excited to take my daughter to library; I forgot it was an option for small children.' 'We read more than one book each day now.' " Another outcome based on attendance at the Ready 2 Read Rendezvous, from Glacier County Libraries in</p>
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					<p>Cut Bank, Montana (which also serves the Blackfeet reservation): "We did incorporate many ideas from the Ready 2 Read Rendezvous and the awesome training we received there! Many of the ideas for our 'Explore IT' Bench/Wall in our children's area were adapted on a smaller scale from the training there both from Jeri with the Boston Children's Museum and from the Storyville concept. (The changeable themes with our mini market stall and the "mouse house" are 2 examples). We were so inspired! Bess always handles Story Time for the month of August, so she decided to do 'Kindergarten Kamp' for the entire month. The themes she presented were: Scissors School, Dress for Success, Lunch Time, Riding the Bus, and Friendship. We purchased little supply boxes and each week they got to add a new school supply to their box and then on the last week they took them home. We had 20 participants and the parents were very appreciative of the program, with new participants that had not attended Story Time before. We also had positive feedback from teachers who thought this was a wonderful idea." Additionally, all Ready 2 Read Rendezvous participants had to attend a webinar to provide updates on their year-long projects. Each webinar had about eight attendees during which each participant shared their project and provided details as to the success they had experienced thus far and the challenges. Participants worked together to brainstorm solutions for challenges. Participants then had to provide a written project update to the Early Literacy Coordinator. Additional training needs were identified in this process (managing volunteers, working with community partners) for which later webinars were scheduled.</p>
<p>3.5. Continue work with established courier services to find an efficient</p>			<p>See goal 2.6</p>		

<p>and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)</p>						
<p>3.6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.</p>			<p>Which goal/objective? Or NA? The BTOP grant focused on this goal. It did not use LSTA funds although BTOP staff consulted with LSTA funded staff, but I couldn't accurately state the number of hours.</p>			
<p><b>Goal 4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted</b></p>	<p>FY2012</p>	<p>\$194,500.02</p>	<p>6 FTE and 90 volunteers.</p>	<p>This funding covers staff salaries and operations for the Montana Talking Book Library (MTBL). Established in 1968, MTBL provides eligible Montana patrons, ages 3 to 103, with direct personal one-to-one patron service and support for ordering, receiving and/or downloading audio and Braille materials.</p>		<p>As part of the Patron Outreach Project (POP), patrons were initially surveyed in 2013 and asked for their input on what significance and value they place on MTBL services in their lives. We received a 81% patron response. When asked what, if any, impact MTBL services had on the patron's quality of life, 100% responded positively, with 89% indicating the main leisure reading and entertainment they receive is through MTBL services. 100% indicated they would recommend MTBL services to everyone with a visual, physical or reading disability. 97% indicated they would not have the quality or accessibility of leisure reading materials without MTBL services, siting transportation, and other limited resources available to them. 3% of patrons indicated they have the resources to afford other leisure reading resources, but utilize</p>

<p><b>in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.</b></p>						<p>MTBL services as their main source of reading and entertainment. 90% indicated the quality of the MTBL and NLS collections are excellent with emphasis on the new easier to use and play digital program; while 10% indicated they will miss the cassette collection and player. Any overwhelming 100% indicated excellent service from all Readers’ Advisors in areas of response to patron requests, suggested reading materials and technology support.</p>
		<p>\$194,500.02</p>				
<p>4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.</p>	<p>FY2012</p>		<p>6 FTE</p>	<p>Number of Montana titles converted from analog to digital:</p>	<p>597</p>	<p>A Digital Transition strategy, developed to convert local Montana analog titles to audio digital, was approved by the Montana Legislature for one-time monies starting on 07/01/2013 through 06/30/2014. It was anticipated that one-third of the local collection would be digitized during that time. In the time period covered in this reporting period, 50 Montana cassette titles were converted to digital. MTBL submitted its first locally recorded digital book “Hand Raised: The Barns of Montana” to NLS for potential nationwide patron enjoyment in the online BARD collection. This creates an additional resource for nationwide Talking Book Libraries to offer their patrons and increases efficiency by not having to utilize an interlibrary loan process.</p>
<p>4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.</p>	<p>FY2013</p>		<p>6 FTE</p>	<p>Number of Montana titles converted from analog to digital:</p>	<p>287</p>	<p>The MTBL Digital Recording Program converted 25% (or 231 titles) of our local cassette titles to digital cartridges. New recording software and equipment were purchased during this time period to offer improved audio quality services and software security. The benefit to MT patrons is access to a higher quality of available MT audio titles from a TBL local recording studio.</p>
<p>4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee</p>	<p>FY2014</p>		<p>6 FTE</p>	<p>Number of Montana titles converted from analog to digital:</p>	<p>35</p>	

transition to digital format and to purchase software, digital cartridges and containers.						
4.1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.	FY2015		6 FTE	Number of Montana titles converted from analog to digital:	225	
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	FY2012		6 FTE	Number of patrons trained to use BARD:	168	
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	FY2013		6 FTE	Number of patrons trained to use BARD:	58	
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	FY2014		6 FTE	Number of patrons trained to use BARD:	41	
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	FY2015		6 FTE	Number of patrons trained to use BARD:	44	
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers.	FY2012		6 FTE	Number of institutions trained to use BARD:	24	

LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.						
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	FY2013		6 FTE	Number of institutions trained to use BARD:	5	
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	FY2014		6 FTE	Number of institutions trained to use BARD:	12	
4.2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.	FY2015		6 FTE	Number of institutions trained to use BARD:	2	
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	FY2012		6 FTE	No activities reported for this objective for FY2012.		
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide	FY2013		6 FTE	Keystone Library Automated Systems (KLAS) updated the MTBL KLAS database system in February,		MTBL staff worked with KLAS staff to develop and install a completely redesigned catalogue subject code heading system that would better meet the needs of MTBL patrons, create a more expedited way to get books to patrons faster, as

system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.				2014, which offered staff additional database functionality in administering patron support. NLS contracted to receive more commercial books from publishers.		well as give more accurate support to MTBL staff in searching the catalogue. The redesign of the KLAS catalog subject code system greatly improved searching capabilities over what the original database system offered. The end result created a much easier and quicker mechanism of finding the desired books for patrons.
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	FY2014		6 FTE	In April 2015, the MTBL Reader Advisor and Keystone automated database (KLAS) software administrator attended the KLAS Users' Conference in Oklahoma City, Oklahoma.		
4.3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.	FY2015		6 FTE			
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	FY2012		6 FTE	MSL/MTBL contracted with a marketing firm to develop a 13 month Patron Outreach Project with the goal of increasing awareness of MTBL, new patrons, and establishing sustainability. Patrons added:	1051	Measurable increases in the MTBL project due to the Patron Outreach Project included: MTBL experienced an increase of 6% in new patrons, welcoming 514 additional new patrons to the service; a 4% increase in phone inquiries regarding services, and a 5% increase in distribution of patron applications and brochures.
4.4. Implement a Patron Outreach Project (POP) to reach all eligible	FY2013		6 FTE	Patrons added:	537	The Patron Outreach Project came to an end on December 31, 2013. The objectives to increase

Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.						awareness about MTBL were successfully met through educating the public about MTBL services using advertising, social media avenues, and newly revised brochures, mailers, and posters. The project reached at least 503,531 Montanans statewide through newspaper ads, with over 3,000 radio spots, and over 1,200 TV public service announcements and paid ads, including ad placement in specialty magazines and publications. Success was also measured by a 29.6% increase in new patrons signed up with MTBL, a 17.2% increase in new patrons downloading materials, and a 117% increase in public requests for MTBL applications for prospective patrons and institutions.
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	FY2014			n/a during this reporting period.		
4.4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.	FY2015		6 FTE			
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2012		6 FTE	Number of patrons served:	16,299	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2013		6 FTE	Number of patrons served:	5,237	Responses to a patron survey on MTBL services were overwhelmingly positive. 80% said that they found MTBL services essential to their quality of life; and 20% would be challenged to find other affordable online resources to serve their needs.



4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2014		6 FTE	Number of patrons served:	2,991	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2015	4691.55 for hardware/software	6 FTE	Number of patrons served:	3,113	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2012		6 FTE	Number of items distributed to patrons:	698,226	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2013		6 FTE	Number of items distributed to patrons:	202,029	Circulation: an increase of 1.5% in USPS processed materials;a total increase of 20.7% in overall circulation of processed materials.
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2014		6 FTE	Number of items distributed to patrons:	147,892	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2015	19917.85 for office lease and supplies	6 FTE	Number of items distributed to patrons:	183,467	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to	FY2012		6 FTE	Number of books downloaded from BARD:	87,773	

implement these activities and to purchase equipment and materials.						
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2013		6 FTE	Number of books downloaded from BARD:	19,790	an increase of 19.2% in BARD downloads
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2014		6 FTE	Number of books downloaded from BARD:	23,525	The number of BARD downloads increased by 19%
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2015		6 FTE	Number of books downloaded from BARD:	28,795	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2012		6 FTE	Number of Braille patrons:	116	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2013		6 FTE	Number of Braille patrons:	69	Responses to a patron survey on MTBL services were overwhelmingly positive. 80% said that they found MTBL services essential to their quality of life; and 20% would be challenged to find other affordable online resources to serve their needs.
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2012		6 FTE	Number of Braille books delivered:	14,686	
4.5. Increase the amount of accessible materials to individuals	FY2013		6 FTE	MTBL created a small internal children's	2,332	Ensures free, accessible and easy-to-use library materials with personal support to state residents

<p>who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.</p>				<p>collection of Twin Vision for Pre-K to 3rd grade. This collection includes Pre-K board books and tactile image books. Twin Vision books are created by taking a standard print book with illustrations and transcribing the text into Braille on a clear plastic overlay inserted on the page. Number of Braille books delivered:</p>		<p>who cannot use standard print due to a visual, physical, or reading disability.</p>
<p>4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.</p>	<p>FY2014</p>		<p>6 FTE</p>	<p>MTBL created a small internal children’s collection of Twin Vision for Pre-K to 3rd grade. This collection includes Pre-K board books and tactile image books. Twin Vision books are created by taking a standard print book with illustrations and transcribing the text into Braille on a clear plastic overlay inserted on the page. Number of Braille books delivered:</p>	<p>82</p>	
<p>4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.</p>	<p>FY2015</p>		<p>6 FTE</p>	<p>MTBL created a small internal children’s collection of Twin Vision for Pre-K to 3rd grade. This collection includes Pre-K board books and tactile image books. Twin Vision books are created by taking a standard print</p>	<p>12,169</p>	

				book with illustrations and transcribing the text into Braille on a clear plastic overlay inserted on the page. Number of Braille books delivered:		
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2012		6 FTE	Number of patron requests answered by Reader Advisors:	61,177	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2013		6 FTE	Number of patrons requests answered by Reader Advisors:	14,882	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2014		6 FTE	Number of patrons requests answered by Reader Advisors:	18,953	Reader Advisors fielded 27% more requests from patrons
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2015		6 FTE	Number of patrons requests answered by Reader Advisors:	12,169	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2012		6 FTE	Number of BARD titles duplicated for non-BARD patrons:	5,820	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to	FY2013		6 FTE	The book inspection and duplication workstations were centralized for a more efficient use of	1,568	The Duplication on Demand Cartridge Program creates access to digital titles in a physical cartridge format for patrons who do not have the resources to access online BARD titles. A total

implement these activities and to purchase equipment and materials.				staff and volunteer time in addition to speeding up the circulation of duplicated digital books being mailed out to patrons. Number of BARD titles duplicated for non-BARD patrons:		of 1,568 titles were duplicated during this reporting period, reflecting the recycling of every cartridge and container originally purchased to maximize LSTA money.
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2014		6 FTE	The book inspection and duplication workstations were centralized for a more efficient use of staff and volunteer time in addition to speeding up the circulation of duplicated digital books being mailed out to patrons. Number of BARD titles duplicated for non-BARD patrons:	1,060	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2015		6 FTE	The book inspection and duplication workstations were centralized for a more efficient use of staff and volunteer time in addition to speeding up the circulation of duplicated digital books being mailed out to patrons. Number of BARD titles duplicated for non-BARD patrons:	1,752	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2012		6 FTE	Number of magazine issues distributed:	69,292	
4.5. Increase the amount of accessible materials to individuals	FY2013		6 FTE	Number of magazine issues distributed:	17,894	

who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.						
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2014		6 FTE	Number of magazine issues distributed:	12,417	
4.5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.	FY2015		6 FTE	Number of magazine issues distributed:	12,353	
4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.	FY2012		6 FTE	New brochures and posters were designed for a variety of outreach efforts to include having a presence at appropriate conferences such as Montana Library Association, Brain Injury Alliance Organization, all three Montana Blind and Low Vision Support Organizations, Montana Education Association, Montana Special Education Association, Montana Ophthalmology Academy, Montana Optometric Association, Montana Veterans Association, Montana Nursing Home and Assisted Living Organizations, and		MTBL increased awareness of its services through these partnerships.

<p>4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.</p>	<p>FY2013</p>			<p>community organizations.                  MTBL staff led or participated in trainings, conference presentations, or information sessions for MT Governor Steve Bullock, the General Federation of Women’s Clubs of MT, newly blind and low vision patrons attending a Summer Orientation Program, the MT HealthCare Association, consumer groups including Brain Injury Association of MT, MT Association of the Blind, National Federation of the Blind-MT, and American Council for the Blind-MT; all MT Blind and Low Vision department low vision support groups; NLS National Biennium Conference; Pacific NW Library Association Conference; Helena College-UM Student Disability Service; Carroll College Volunteer Fair; multiple retirement facilities; statewide community clubs and organizations; and blind and public elementary school special education</p>		<p>MTBL increased awareness of its services through these partnerships.</p>
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			<p>teachers and parents. MTBL also collaborated with Perkins School for the Blind to offer legally deaf and blind Montanans technology benefits through the national iCanConnect program; and with independent Orientation and Mobility Counselors, vendors, and organizations to provide demonstrations of various devices to patrons using the MTBL Patron Center.</p>		
<p>4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.</p>	<p>FY2014</p>		<p>MTBL staff presented training and outreach to these organizations: Montana Blind and Low Vision Department; Montana American Council for the Blind (MACB) consumer group; Montana Veterans Administration; Butte Housing Authority; various chapters of the Montana Association for the Blind; Montana Library Association; National Federation of the Blind – Montana chapter; Great Falls low vision group; Touchmark retirement home book club; Overhear Consulting Company; Montana Health Care</p>		<p>MTBL increased awareness of its services through these partnerships.</p>



				<p>Association; and Eagles Manor retirement home. Additionally, MTBL staff provided information and demonstrated services for state legislators at the Montana Library Association’s Library Legislative Day in January 2015.</p>		
<p>4.6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.</p>	<p>FY2015</p>		<p>6 FTE</p>			

## Appendix D4 –Staff Interview/Focus Group Questions

### State Library Staff Interview Questions

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)  
  
How has this changed from the past five-year 2008-2012 LSTA plan?
3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1) - **See Program to Activity Crosswalk**
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and

collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2017 period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
- 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>16</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users’ formal education
- 1.2. Improve users’ general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users’ ability to discover information resources
- 2.2. Improve users’ ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library’s physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users’ ability to use resources and apply information for employment support
- 4.2. Improve users’ ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users’ ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users’ ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users’ ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users’ ability to participate in their community
- 6.2. Improve users’ ability to participate in community conversations around topics of concern.

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?

- 23. Library workforce (current and future)
- 24. Individuals living below the poverty line
- 25. Individuals that are unemployed/underemployed
- 26. Ethnic or minority populations

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<sup>16</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

27. Immigrants/refugees
28. Individuals with disabilities
29. Individuals with limited functional literacy or information skills
30. Families
31. Children (aged 0-5)
32. School-aged youth (aged 6-17)

**Process Questions:**

8. B-1. How have you used data from the old and new State Program Report (SPR) and elsewhere to guide activities included in the Five-Year Plan?
9. B-2. Specify any changes you made to the Five-Year Plan, and why this occurred.
10. B-3. How and with whom have you shared data from the old and new SPR and from other evaluation resources?
11. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:
  - a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
  - b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
  - c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
  - d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audiobooks (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to*

*embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation’s population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*

#### Ongoing Evaluation per the Five-Year Plan

##### **Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

1. “Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level.”
2. “While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews.”
3. “The following evaluation period should include an analysis of MSC in both urban and rural libraries.”

“Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC’s input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.

## Appendix D5 – NAC and Library Commission Focus Group Questions

### State Library Commission/NAC Focus Group Questions

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, etc. (Identify processes at work in implementing the activities in the plan, including the use of **performance-based measurements in planning, policy making and administration**)
  - 2-a. How would you, as a NAC [or Commission] representative, describe your role in the LSTA planning, policy making, and administration process?
  - 2-b. What part of the process helps you to serve in this role?
  - 2-c. What part of the process should be improved to help you serve in this role?
3. Let's do a SWOT analysis
  - a. What are the strengths of your LSTA program?
  - b. What are your main weaknesses?
  - c. What are your main opportunities for the next five years?
  - d. What are your main threats to protect against and avoid in the next five years?
4. Describe your current plan and to what extent did your Five-Year Plan activities make progress towards each goal (see below)? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA**

**Priority 5 (6) - target library services to individuals with special needs).** *This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017 period.*

- a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)
5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. Do you feel these should be the same priorities for 2018-2022?
- 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (**MSL State Goal 1: consultation, leadership, training**)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)



- 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.
6. A-2. To what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas<sup>17</sup> and their corresponding intents? Do you feel these should be the same priorities for 2018-2022?
- 1. Lifelong Learning (MSL Goal 3)**
    - 1.1. Improve users' formal education
    - 1.2. Improve users' general knowledge and skills
  - 2. Information Access (MSL Goals 2, 3, 4)**
    - 2.1. Improve users' ability to discover information resources
    - 2.2. Improve users' ability to obtain and/or use information resources
  - 3. Institutional Capacity (MSL Goals 1, 3)**
    - 3.1. Improve the library workforce
    - 3.2. Improve the library's physical and technological infrastructure
    - 3.3. Improve library operations
  - 4. Economic & Employment Development**
    - 4.1. Improve users' ability to use resources and apply information for employment support
    - 4.2. Improve users' ability to use and apply business resources
  - 5. Human Services**
    - 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
    - 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
    - 5.3. Improve users' ability to apply information that furthers their parenting and family skills
  - 6. Civic Engagement**
    - 6.1. Improve users' ability to participate in their community
    - 6.2. Improve users' ability to participate in community conversations around topics of concern.

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<sup>17</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

7. A-3. Did any of the following groups represent a substantial focus for your Five-Year Plan activities (Yes/No)? Should there be any changes or targeted groups for 2018-2022?
- Library workforce (current and future)
  - Individuals living below the poverty line
  - Individuals that are unemployed/underemployed
  - Ethnic or minority populations
  - Immigrants/refugees
  - Individuals with disabilities
  - Individuals with limited functional literacy or information skills
  - Families
  - Children (aged 0-5)
  - School-aged youth (aged 6-17)
8. Please describe to what extent MSL addressed these previous 2012 evaluation recommendations:
- a. **MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services.** *Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project, MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.*
  - b. **MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services.** *The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.*
  - c. **MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries.** *The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.*
  - d. **The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group.** *Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not*

*transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.*

- e. **MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.** *The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation’s population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.*
9. Ongoing Evaluation per the Five-Year Plan

**Evaluation Plan (pg. 22)**

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

1. “Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level.”
2. “While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews.”
3. “The following evaluation period should include an analysis of MSC in both urban and rural libraries.”

“Evaluation will be an ongoing activity.

- MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects.
- This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC’s input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.”

## Appendix D6 – Librarian and Patron Interview/Focus Group Questions

### Librarian Focus Group Questions

1. Describe the current state of Montana in terms of its economy, demographics, current and future needs, and the role of libraries.
2. Describe the State Library and your LSTA process in terms of staff, activities, reporting, funding, ease-of-use and interaction, etc.
3. What are the State Library’s strengths and opportunities? Do they use performance-based measurements in planning, policy making and administration?
4. To what extent, do you feel the State Library met the following goals in support of Montana’s libraries and patrons?
  - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed? (A-1)

**Goal 1:** MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered (**LSTA Priority 1 - expand services for learning and access to information; LSTA Priority 3 - consultation, leadership, training**).

**Goal 2:** MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services (**LSTA Priority 2 - establish or enhance electronic and other linkages/improve library coordination; LSTA Priority 7 - expand services for learning and access to information**).

**Goal 3:** MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 7 - expand services for learning and access to information**).

*The goal is MSL’s number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.*

**Goal 4:** MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need (**LSTA Priority 4 (5) - develop public and private partnerships; LSTA Priority 5 (6) - target library services to individuals with special needs**). *This is not truly the number four goal for MSL. In the agency’s long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA priority for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL’s goals for the 2013-2017*

*period.*

5. Here are the nine IMLS priorities and it appears that MSL has explicitly targeted 6 of 9. To what extent do you feel the State Library has met these priorities and do you feel these should be the same priorities for 2018-2022?
  - 1) Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills (MSL State Goal 1: consultation, leadership, training)
  - 2) Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services (**MSL State Goal 2: acquire and manage content; provide access**)
  - 3) Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services (**MSL State Goal 1: consultation, leadership, training**)
  - 4) Enhance efforts to recruit future professionals to the field of library and information services;
  - 5) Develop public and private partnerships with other agencies and community-based organizations (**MSL State Goal 3: promote partnerships and collaboration and MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 6) Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills (**MSL State Goal 4: acquire content and provide access and outreach for TBL patrons**)
  - 7) Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line (as defined by the Office of Management and Budget and revised annually in accordance with section 9902(2) of title 42) applicable to a family of the size involved (**MSL State Goal 2: acquire and manage content; provide access**)
  - 8) Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks; and
  - 9) Carry out other activities consistent with the purposes set forth in section 9121, as described in the SLAA's plan.

6. A-2. To what extent do you feel the State Library met the following associated with the Measuring Success focal areas<sup>18</sup> national priorities? Which do you feel should be priorities for 2018-2022?

**1. Lifelong Learning (MSL Goal 3)**

- 1.1. Improve users' formal education
- 1.2. Improve users' general knowledge and skills

**2. Information Access (MSL Goals 2, 3, 4)**

- 2.1. Improve users' ability to discover information resources
- 2.2. Improve users' ability to obtain and/or use information resources

**3. Institutional Capacity (MSL Goals 1, 3)**

- 3.1. Improve the library workforce
- 3.2. Improve the library's physical and technological infrastructure
- 3.3. Improve library operations

**4. Economic & Employment Development**

- 4.1. Improve users' ability to use resources and apply information for employment support
- 4.2. Improve users' ability to use and apply business resources

**5. Human Services**

- 5.1. Improve users' ability to apply information that furthers their personal, family, or household finances
- 5.2. Improve users' ability to apply information that furthers their personal or family health & wellness
- 5.3. Improve users' ability to apply information that furthers their parenting and family skills

**6. Civic Engagement**

- 6.1. Improve users' ability to participate in their community
- 6.2. Improve users' ability to participate in community conversations around topics of concern.

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<sup>18</sup> October 2011 COSLA Report, [Fall 2011 Appendix A -- Evolution of Measuring Success Initiative](#)

7. A-3. Did any of the following groups represent a substantial focus for the State Library (Yes/No)? Which should be the primary focus over the next five years (2018-2022)?

- Library workforce (current and future)
- Individuals living below the poverty line
- Individuals that are unemployed/underemployed
- Ethnic or minority populations
- Immigrants/refugees
- Individuals with disabilities
- Individuals with limited functional literacy or information skills
- Families
- Children (aged 0-5)
- School-aged youth (aged 6-17)

8. Any other thoughts or comments about what the State Library needs to focus on over the next five years?

**Appendix D7 – Montana State Library LSTA Five-Year (2013-2017) Survey**  
**Montana State Library Five-Year LSTA Evaluation Survey**

As a requirement of the Institute of Museum and Library Services (IMLS) funding of the Library Services and Technology Act (LSTA), each state must conduct an evaluation of its five-year plan. The primary purpose of this evaluation is to understand the progress made towards the Montana State Library's high priority goals as identified in our 2013-2017 LSTA Five-Year Plan. Another equally important goal, however, is to understand the current and future needs of our great state and in what ways can your State Library align itself in helping meet these needs in a new five-year plan (2018-2022).

You can also complete this survey online at <https://www.surveymonkey.com/r/msllstarandomsurvey>

**Please complete the survey no later than December 31, 2016.**

**1. How important are the following INFORMATION sources in your daily life?**

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone over the Internet (Skype, Gmail talk, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
National news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Movie reviews	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
World news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General website surfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weather	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone/Cell phone Telephone Calls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone/Cell phone Texting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social Media in General (e.g. Youtube, Instagram, LinkedIn, Snapchat, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*



2. How important are the following these additional INFORMATION sources in your daily life?

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bloggging in general	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Video conferencing (Skype, Google Video, Facetime, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hunting/Fishing Reports and Forecasts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet Computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laptop Computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chromebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Desktop Computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

3. How important are the following sources of ENTERTAINMENT in your daily life?

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Redbox	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
National news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies via DVD	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
YouTube videos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone/Cellphone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Netflix	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies on the Internet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local news	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leisure reading	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies on TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone web browsing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone texting/instant messaging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

**4. How important are these additional sources of ENTERTAINMENT in your daily life?**

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Playing traditional games (e.g. board games, cards, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching / Reading about sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General website surfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Video conferencing (Skype, Google Video, Facetime, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Listening to music on the Internet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Movie reviews	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone listening to music/podcasts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone playing games/using apps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Amazon Prime or Other Internet Streaming Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attending community events (sports, theater, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone over the Internet (Skype, Gmail talk, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching movies at the theater	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching TV in general	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exercising/playing sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone Talking on the Phone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone watching TV/videos/Movies, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor leisure activities (bicycling, horseback riding, skiing, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**5. What do you believe are the three most important resources, programs, or services the Library should provide to benefit you and the community?**

*Priority 1:*

*Priority 2:*

*Priority 3:*

**6. Think about the past 12 months. In a typical month, approximately how many times would you say you have visited or used, including online, a library?**

- Less than once a month
- 1 visit
- 2 visits
- 3-4 visits
- 5 or more visits
- Not at all

Please elaborate on your selection, especially if you do not use the Library (why?) or use it infrequently:

**7. On average, how long does it take you to arrive at the library you use most frequently?**

- 0-5 minutes
- 5-10 minutes
- 10-15 minutes
- 15-20 minutes
- 20-25 minutes
- 25-30 minutes
- 30+ minutes

**8. Please rate the importance of the following library services to you over the past 12 months:**

	1 (Not Important)	2	3	4	5	6	7 (Extremely Important)	N/A
Checking out printed books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Checking out audio books or music on CDs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Checking out movies on DVDs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downloading eBooks, music, or eAudio books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Downloading Audio books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using reference materials, newspapers, magazines, or other periodicals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs or services designed for children 5 and under	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help with homework for school aged children or teens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library Wi-Fi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff help with your computer or other digital device	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Computer or Internet training classes or workshops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library Website (e.g. to search for materials, place materials on hold, renew materials, use research resources, or manage your account online).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs or services to help find a job or create a resume	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to read	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to work or study	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to socialize and attend community events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To use public meeting rooms for any purpose, including voting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**9. To what extent do you feel the following national library priorities should represent a substantial focus of Montana's libraries over the next five years?**

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhance efforts to recruit future professionals to the field of library and information services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop public and private partnerships with other agencies and community-based organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, and to individuals with limited functional literacy or information skills.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**10. Which of the following national library priority areas should be a priority for Montana's libraries in serving library patrons over the next five years?**

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
1. Lifelong Learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.1. Improve users' formal education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.2. Improve users' general knowledge and skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Information Access	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.1. Improve users' ability to discover information resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.2. Improve users' ability to obtain and/or use information resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Institutional Capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.1. Improve the library workforce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.2. Improve the library's physical and technological infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3.3. Improve library operations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>4. Economic &amp; Employment Development</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.1. Improve users’ ability to use resources and apply information for employment support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.2. Improve users’ ability to use and apply business resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>5. Human Services</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.1. Improve users’ ability to apply information that furthers their personal, family, or household finances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.2. Improve users’ ability to apply information that furthers their personal or family health & wellness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.3. Improve users’ ability to apply information that furthers their parenting and family skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>6. Civic Engagement</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6.1. Improve users’ ability to participate in their community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6.2. Improve users’ ability to participate in community conversations around topics of concern.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**11. To what extent do you feel the following groups should represent a substantial focus for Montana libraries over the next five years?**

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
Library workforce (current and future)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals living below the poverty line	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals that are unemployed/underemployed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ethnic or minority populations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Immigrants/refugees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals with disabilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individuals with limited functional literacy or information skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Families	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children (aged 0-5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School-aged youth (aged 6-17)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Comments:*

**Demographic Information**

**12. Please tell us your gender:**

- Female  Male

**13. Please tell us your race and check all that apply:**

- White  White (Spanish/Hispanic/Latino)  Black  American Indian or Alaskan Native  Asian  
 Native Hawaiian or Other Pacific Islander  Other (please specify):

**14. Please tell us your age range:**

- 17 or Under  18-24  25-34  35-44  45-54  55-64  65+

**15. What is the major language spoken in your home?**

- English  Spanish  Native American (please specify tribal language) or Other (please specify):

**16. Your education (highest degree earned):**

- |  |   |
|--|---|
| <input type="radio"/> Some high school                             | <input type="radio"/> Bachelor's Degree |
| <input type="radio"/> High School Diploma                          | <input type="radio"/> Master's Degree   |
| <input type="radio"/> Associate of Arts (2-year community college) | <input type="radio"/> Ph.D./Ed.D.       |
| <input type="radio"/> Technical Certificate                        | <input type="radio"/> JD / MD           |

**17. Your Combined Household Income:**

- 0-\$25,000  \$25,000-\$50,000  \$50,000-\$75,000  \$75,000-\$100,000  \$100,000+

**18. Do you have a computing device (computer, laptop, and/or Tablet) at home?**

- Yes  No

**19. Do you have access to the Internet at home, and, if so, through what device(s)? (check all that apply)**

- No, I do not have access to the Internet  Laptop  Desktop  Tablet  Chromebook  
 Cellphone (no web browsing)  Smartphone  Other (please specify):

**20. On a daily basis, how often do you use the following resources for accessing information?**

	1 (Low Priority)	2	3	4	5	6	7 (High Priority)	N/A
Print newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Print magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Radio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laptop computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Desktop computer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tablet PC (e.g. Surface, iPad Air, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Cellphone (no web browsing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone web browsing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone mobile apps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social Media (e.g. Facebook, Twitter, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Computer instant messaging (e.g. Google Hangout, Facebook, Twitter, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone instant messaging (e.g. Instant messaging, Google Hangout, Facebook, Twitter, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smartphone texting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone (wired or cell)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Comments:**

21. We greatly thank you for taking the time to complete our survey. Please let us know if you have any other thoughts or comments on how the State Library has progressed over the past five years OR what you feel we should focus on in the next Five Year 2018-2022 strategic plan.

All completed surveys with a name and contact information will be entered into a drawing to win an iPad Mini 2 or one of three \$20 Starbucks gift cards.

Name (optional):

Phone Number (optional):

Email Address (optional):

Thank you so much for your participation in this survey!

Appendix E –

E1 – Logic Model Summary Tables

Administrative costs for managing LSTA award

LSTA Goals	FY2012	%	FY2013	%	FY2014	%	FY2015	%	Total	%
Goal 1	\$313,782.07	31%	\$339,356.24	35%	\$354,507.33	36%	\$316,942.52	32%	\$1,324,588.16	33%
Goal 2	\$476,794.96	47%	\$377,464.87	39%	\$416,420.99	42%	\$447,388.31	45%	\$1,718,069.13	43%
Goal 3	\$25,157.00	2%	\$52,303.02	5%	\$20,681.00	2%	\$48,568.52	5%	\$146,709.54	4%
Goal 4	\$194,500.02	19%	\$199,362.00	21%	\$199,362.00	20%	\$174,652.10	18%	\$767,876.12	19%
<b>TOTAL</b>	<b>\$1,010,234.05</b>		<b>\$968,486.13</b>		<b>\$990,971.32</b>		<b>\$987,551.45</b>		<b>\$3,957,242.95</b>	

Administrative costs for managing LSTA award

LSTA Goals	FY2012	FY2013	FY2014	FY2015	Total
Goal 1	\$313,782.07	\$339,356.24	\$354,507.33	\$316,942.52	\$1,324,588.16
Goal 2	\$476,794.96	\$377,464.87	\$416,420.99	\$447,388.31	\$1,718,069.13
Goal 3	\$25,157.00	\$52,303.02	\$20,681.00	\$48,568.52	\$146,709.54
Goal 4	\$194,500.02	\$199,362.00	\$199,362.00	\$174,652.10	\$767,876.12
<b>TOTAL</b>	<b>\$1,010,234.05</b>	<b>\$968,486.13</b>	<b>\$990,971.32</b>	<b>\$987,551.45</b>	<b>\$3,957,242.95</b>

Goal Outputs

Activity	2012	2013	2014	2015	Total
Site Visits	412	122	135		669
E-Rate Consultations	220	60	54	51	385
Information requests from public library staff	1712	330	494	282	2818
Consultant led training (in-person and virtual)	189	50	22	52	313
Attendance at training sessions	2274	859	286	416	3835
Technology Petting Zoos (TPZ)					
Activity	2012	2013	2014	2015	Total
E-Rate Savings	\$80,000.00	\$82,800.00	\$92,000.00	\$135,357.28	\$390,157.28
Activity	2012	2013	2014	2015	Total
Fall Training Workshops	53	21		12	86
Workshop Attendees	561	160		140	861
Trustee Training Hours	21	9	12	12	54
Trustee Attendees	335	34	116	64	549
Activity/Output	2012	2013	2014	2015	Total
Online Training Hours	292		81	59	432
GoToMeeting Licenses		82			82
Certifications	309	80	63	86	538
Number of webinars available on the MSL Vimeo channel		69			69
Activity/Output	2012	2013	2014	2015	Total
MontanaLibrary2Go Circulation (e-resources)	2,641,906	607,637	749,996	862,563	4,862,102
MontanaLibrary2Go New Patrons	60,064	16,921	12,305	13,207	102,497



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New items added to MontanaLibrary2Go	26,675	4,458	8,154	7,510	46,797
Total items available in MontanaLibrary2Go	20,314	22,539	30,693		
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Montana Memory Project (MMP) Training Presentations	165	46	56	53	320
Attendees	1670	412	840	318	3,240
MMP Outreach Visits		38	26	22	86
Digital Collections Improved	1	78			79
New Collections Added	9	9	25	4	47
Number of collections hosted on MMP website	178	78	103	48	407
Contributing Institutions	161	38	45	48	292
Number of images hosted on site	2,069,128	254,762	860,164	707,964	3,892,018
Number of images added		254,762	104,402		359,164
Website Visits		124,769	174,430		299,199
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
EBSCO Discovery Service for all Montana libraries	800	800	800	800	3,200
Training Sessions	40	13			53
Training Attendees	329	117			446
Search Statistics	202,147	69,069	76,508		347,724
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Montana Shared Catalog Allocations	\$181,310.00	\$172,150	\$176,254	\$184,912.62	\$714,626.62
Help Requests	33,780	17,000	1,890	1,890	54,560
Training Sessions Offered	130	44	15	34	223
Attendees	1427	423	182	442	2,474
Number of Libraries Added to MSC	38	3	2	7	50
Startup and data migration fees	\$54,850.16	\$16,344	\$1,900	\$39,667.00	\$112,761.16
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Offset costs to participating libraries for access to OCLC cataloging, interlibrary loan, and authentication tools	\$59,736.00	\$62,277	\$89,741	\$75,380.00	\$287,134.00
Number of libraries enrolled to receive discounted access to OCLC Group Services	1045	251	272	273	1,841
Number of original catalog records added to WorldCat	8,336	3,140	2,933	2,000	16,409
Number of copy catalog records updated in WorldCat	466,590	78,980	89,023	209,155	843,748
Number of ILL requests filled (borrowing)	53,071	49,758	46,859	44,099	193,787
Number of ILL requests filled (lending)	194,449	50,420	50,201	50,000	345,070
Courier Project	\$16,334.00				\$ 16,334.00
startup costs for joining the courier service	\$10,372.68		\$7,839	\$5,765.50	\$ 23,977.18
Number of libraries that received this discount	43		19	18	80
Number of items circulating via courier per month	17,060		685	16,265	34,010
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Cost of early literacy staff hours	\$10,000.00	\$10,000.00	\$10,000.00	\$28,675.90	\$ 58,675.90
Number of Ready2Read training events offered:	12				12
Number of Ready2Read training (online and in-person sessions, excluding the Rendezvous) attendees	479				479

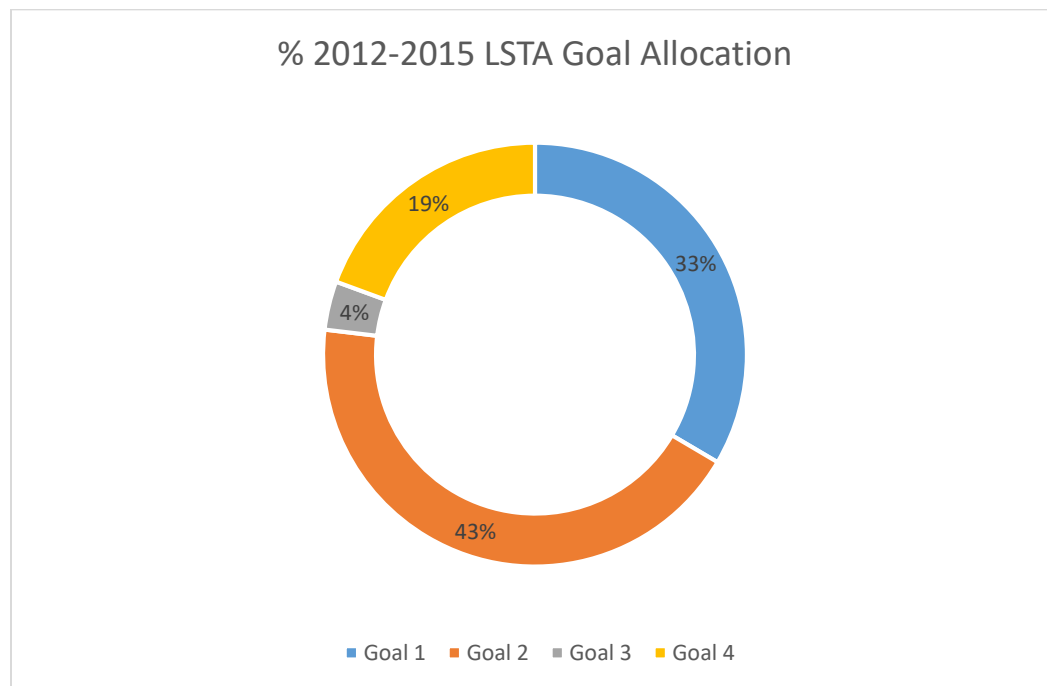
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Cost of Ready2Read Rendezvous	\$4,007.00	\$15,504.42		\$15,294.14	\$ 34,805.56
Attendees	88	38		45	171
Ready2Read program development meeting			\$2,150	\$1,600.00	\$ 3,750.00
Cost of Ready2Read material information	\$7,630.00	\$3,524.82		\$1,623.48	\$ 12,778.30
Ready2Read material disseminated	5,000	60,000		15,000	80000
Cost of Summer Reading Program Training	\$2,150.00	\$1,375.00	\$2,150	\$1,600.00	\$ 7,275.00
Summer Reading Program Training Sessions	12	13	0	7	32
Cost of Summer Reading Program Manuals	\$1,100.00	\$1,100	\$1,375	\$1,375.00	\$ 4,950.00
Summer Reading Program Manuals Disseminated	440	110	110	110	770
Cost of Summer reading public service announcements		\$270.00			270
Summer reading public service announcements		6			6
Cost of MT Makers traveling makerspaces	\$18,446.78	\$18,446.78	\$4,656		\$ 41,549.56
MT Makers traveling makerspaces disseminated		18	6		24
Number of libraries that hosted makerspace kits		21	15		36
Number of programs hosted by libraries during this period that made use of the makerspace kits		52	33		85
Number of attendees at maker programs		1,647	1,254		2901
Cost of Share Your Story		\$2,082			\$ 2,082.00
Share Your Story Kits		4			4
Share Your Story Interviews		8			8
Cost of Ready2Read Rendezvous Training				\$15,294.14	\$ 15,294.14
Ready2Read Rendezvous Training Attendees				45	45
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Number of Montana titles converted from analog to digital	597	287	35	225	1144
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Number of patrons trained to use BARD	168	58	41	44	311
Number of institutions trained to use BARD	24	5	12	2	43
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Patron Outreach Project (POP) new patrons added	1051	537			1588
<b>Activity/Output</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>Total</b>
Number of Patrons Served	16,299	5,237	2,991	3,113	27,640
Items Distributed	698,226	202,029	147,892	183,467	1,231,614
Number of books downloaded from BARD	87,773	19,790	23,525	28,795	159,883
Number of Braille patrons	116	69			185
Number of Braille books delivered:	14,686	2,332	82	12,169	29,269
Number of patron requests answered by Reader Advisors	61,177	14,882	18,953	12,169	107,181
Number of BARD titles duplicated for non-BARD patrons:	5,820	1,568	1,060	1,752	10,200
Number of magazine issues distributed:	69,292	17,894	12,417	12,353	111,956

2012-2015 LSTA Goal Allocation	Total	%
Goal 1	\$ 1,324,589.18	33%

Goal 2	\$ 1,718,070.41	43%
Goal 3	\$ 146,709.64	4%
Goal 4	\$ 767,876.72	19%
	\$ 3,957,245.95	100%

2012-2015 LSTA Goal Allocation	%
Goal 1	33%
Goal 2	43%
Goal 3	4%
Goal 4	19%
	100%



## E2 – Survey Responses Summary Tables

**E3 - Montana Public Library Statistics (2006-2015)**  
**Public Library Income**

<b>Descriptives</b>				
		<b>N</b>	<b>Mean</b>	<b>Maximum</b>
Income - City	2006	80	\$ 69,713.66	\$1,708,022.00
	2007	80	\$ 72,736.61	\$1,713,790.00
	2008	80	\$ 77,007.74	\$1,792,506.00
	2009	80	\$ 99,950.70	\$1,948,285.00
	2010	80	\$107,218.85	\$1,955,178.00
	2011	81	\$110,233.16	\$2,077,614.00
	2012	82	\$108,632.98	\$2,043,261.00
	2013	82	\$112,103.22	\$2,084,607.00
	2014	82	\$116,286.22	\$2,157,146.00
	2015	82	\$117,829.11	\$2,340,621.00
	Total	809	\$ 99,328.70	\$2,340,621.00
		Change	41%	
		<b>N</b>	<b>Mean</b>	<b>Maximum</b>
Income - County	2006	80	\$142,422.69	\$2,238,838.00
	2007	80	\$148,056.76	\$2,411,618.00
	2008	80	\$169,429.68	\$2,672,110.00
	2009	80	\$161,348.24	\$2,535,196.00
	2010	80	\$154,832.23	\$2,375,380.00
	2011	81	\$163,619.86	\$2,725,274.00
	2012	82	\$162,909.65	\$2,680,669.00
	2013	82	\$171,293.73	\$2,767,134.00
	2014	82	\$183,597.95	\$2,954,951.00
	2015	82	\$195,361.71	\$3,289,770.00
	Total	809	\$165,413.78	\$3,289,770.00
		Change	27%	
		<b>N</b>	<b>Mean</b>	<b>Maximum</b>
Income - State - Coal Severance Tax	2006	80	\$ 1,769.88	\$ 5,764.00
	2007	80	\$ 1,867.41	\$ 6,412.00
	2008	80	\$ 2,192.21	\$ 9,562.00
	2009	80	\$ 2,192.29	\$ 9,550.00
	2010	80	\$ 2,192.11	\$ 9,550.00
	2011	81	\$ 2,164.98	\$ 10,465.00
	2012	82	\$ 2,138.77	\$ 10,558.00
	2013	82	\$ 2,138.67	\$ 10,547.00
	2014	82	\$ 2,138.67	\$ 10,663.00
	2015	82	\$ 2,119.71	\$ 10,372.00
	Total	809	\$ 2,091.98	\$ 10,663.00
		Change	17%	
		<b>N</b>	<b>Mean</b>	<b>Maximum</b>

Income - State - Interlibrary Loan	2006	80	\$ 2,273.90	\$ 56,729.00
	2007	80	\$ 1,937.99	\$ 60,690.00
	2008	80	\$ 2,133.69	\$ 59,015.00
	2009	80	\$ 2,125.85	\$ 56,950.00
	2010	80	\$ 2,185.29	\$ 51,390.00
	2011	81	\$ 2,182.65	\$ 45,754.00
	2012	82	\$ -	\$ -
	2013	82	\$ -	\$ -
	2014	82	\$ -	\$ -
	2015	82	\$ -	\$ -
	Total	809	\$ 1,272.35	\$ 60,690.00
		Change	#DIV/0!	
		N	Mean	Maximum
Income - State - Per Capita/Per Square Mile	2006	80	\$ 1,327.99	\$ 12,322.00
	2007	80	\$ 1,280.96	\$ 12,322.00
	2008	80	\$ 1,269.66	\$ 12,322.00
	2009	80	\$ 1,280.36	\$ 12,322.00
	2010	80	\$ 1,283.09	\$ 12,322.00
	2011	81	\$ 1,257.81	\$ 12,322.00
	2012	82	\$ 1,242.45	\$ 13,026.00
	2013	82	\$ 1,249.88	\$ 13,026.00
	2014	82	\$ 4,810.45	\$ 50,133.00
	2015	82	\$ 4,810.45	\$ 50,133.00
	Total	809	\$ 1,990.77	\$ 50,133.00
		Change	72%	
		N	Mean	Maximum
Income - State - Total	2006	80	\$ 5,680.94	\$ 69,103.00
	2007	80	\$ 5,086.36	\$ 72,881.00
	2008	80	\$ 5,595.56	\$ 75,087.00
	2009	80	\$ 5,598.43	\$ 73,055.00
	2010	80	\$ 5,660.49	\$ 67,518.00
	2011	81	\$ 5,605.62	\$ 65,876.00
	2012	82	\$ 3,381.11	\$ 20,696.00
	2013	82	\$ 3,388.48	\$ 20,685.00
	2014	82	\$ 6,949.13	\$ 51,663.00
	2015	82	\$ 6,930.13	\$ 51,688.00
	Total	809	\$ 5,385.67	\$ 75,087.00
		Change	18%	
		N	Mean	Maximum
Income - Federal	2006	80	\$ 220.54	\$ 9,967.00
	2007	80	\$ 311.23	\$ 10,976.00
	2008	80	\$ 485.21	\$ 20,992.00
	2009	80	\$ 1,647.13	\$ 96,687.00
	2010	80	\$ 328.64	\$ 20,000.00
	2011	81	\$ 3,053.68	\$ 89,634.00
	2012	82	\$ 2,162.78	\$ 88,759.00
	2013	82	\$ 1,316.46	\$ 36,620.00
	2014	82	\$ 144.27	\$ 4,908.00

	2015	82	\$ 238.18	\$ 17,000.00
	Total	809	\$ 993.11	\$ 96,687.00
		Change	7%	
		N	Mean	Maximum
Income - Other	2006	80	\$ 24,116.66	\$ 481,946.00
	2007	80	\$ 22,620.80	\$ 436,408.00
	2008	80	\$ 28,540.20	\$ 594,803.00
	2009	80	\$ 21,020.03	\$ 377,736.00
	2010	80	\$ 27,781.74	\$ 552,142.00
	2011	81	\$ 20,647.84	\$ 289,362.00
	2012	82	\$ 20,884.66	\$ 270,426.00
	2013	82	\$ 20,326.78	\$ 238,731.00
	2014	82	\$ 23,527.48	\$ 224,773.00
	2015	82	\$ 21,503.11	\$ 258,656.00
		Total	809	\$ 23,078.71
		Change	-12%	
		N	Mean	Maximum
Income - Total	2006	80	\$242,154.49	\$2,692,752.00
	2007	80	\$248,811.76	\$2,679,169.00
	2008	80	\$281,058.39	\$2,986,056.00
	2009	80	\$289,564.51	\$2,981,711.00
	2010	80	\$295,821.94	\$3,146,422.00
	2011	81	\$303,160.16	\$3,048,759.00
	2012	82	\$297,971.17	\$3,015,300.00
	2013	82	\$308,428.67	\$3,068,898.00
	2014	82	\$330,505.05	\$3,333,206.00
	2015	82	\$341,862.24	\$3,459,592.00
		Total	809	\$294,199.96
		Change	29%	
		N	Mean	Maximum
Income - Per Capita (Service Population)	2006	80	\$ 26.02	\$ 199.45
	2007	80	\$ 25.67	\$ 97.84
	2008	80	\$ 27.52	\$ 93.80
	2009	80	\$ 29.58	\$ 103.53
	2010	80	\$ 31.78	\$ 106.94
	2011	81	\$ 29.79	\$ 101.68
	2012	82	\$ 29.77	\$ 124.47
	2013	82	\$ 31.51	\$ 124.90
	2014	82	\$ 33.68	\$ 136.85
	2015	82	\$ 34.01	\$ 120.27
		Total	809	\$ 29.95
		Change	23%	
		N	Mean	Maximum
Income - Per Capita (Census/Estimated Population)	2006	80	\$ 37.83	\$ 854.17
	2007	80	\$ 31.35	\$ 193.39
	2008	80	\$ 34.02	\$ 227.10

	2009	80	\$ 36.96	\$ 265.99
	2010	80	\$ 38.79	\$ 414.71
	2011	81	\$ 30.03	\$ 102.30
	2012	82	\$ 30.19	\$ 125.09
	2013	82	\$ 42.87	\$ 564.85
	2014	82	\$ 46.43	\$ 557.44
	2015	82	\$ 44.65	\$ 402.23
	Total	809	\$ 37.34	\$ 854.17
		Change	15%	

## Public Library Capital

Descriptives				
		N	Mean	Maximum
Capital Expenditures - Collection	2006	80	\$ 3,819.69	\$ 266,127.00
	2007	80	\$ 37,333.89	\$ 2,939,000.00
	2008	80	\$ 473.74	\$ 16,163.00
	2009	80	\$ 398.51	\$ 17,640.00
	2010	80	\$ 866.96	\$ 26,803.00
	2011	81	\$ 4,510.15	\$ 331,327.00
	2012	82	\$ 4,193.99	\$ 315,236.00
	2013	82	\$ -	\$ -
	2014	82	\$ 369.83	\$ 23,539.00
	2015	82	\$ 235.46	\$ 14,508.00
	Total	809	\$ 5,179.59	\$ 2,939,000.00
	Change		-1522%	
Capital Expenditures - Equipment	2006	80	\$ 2,720.81	\$ 57,318.00
	2007	80	\$ 9,820.54	\$ 483,309.00
	2008	80	\$ 2,185.83	\$ 64,735.00
	2009	80	\$ 3,525.04	\$ 55,885.00
	2010	80	\$ 5,034.80	\$ 157,500.00
	2011	81	\$ 2,279.19	\$ 32,539.00
	2012	82	\$ 2,985.80	\$ 49,715.00
	2013	82	\$ -	\$ -
	2014	82	\$ 30,607.37	\$ 2,414,215.00
	2015	82	\$ 4,072.43	\$ 155,534.00
	Total	809	\$ 6,348.77	\$ 2,414,215.00
	Change		33%	
Capital Expenditures - Building	2006	80	\$104,376.81	\$ 7,571,417.00
	2007	80	\$ 43,603.41	\$ 2,657,679.00
	2008	80	\$ 22,635.33	\$ 880,000.00
	2009	80	\$ 9,218.05	\$ 387,671.00
	2010	80	\$ 17,074.25	\$ 302,234.00
	2011	81	\$ 4,854.16	\$ 150,000.00
	2012	82	\$ 8,655.30	\$ 506,170.00
	2013	82	\$ -	\$ -
	2014	82	\$ 59,873.15	\$ 4,733,312.00
	2015	82	\$ 35,538.21	\$ 1,908,128.00
	Total	809	\$ 30,505.91	\$ 7,571,417.00



		Change	-194%	
Capital Expenditures - Other	2006	80	\$ 1,089.49	\$ 51,439.00
	2007	80	\$ 809.83	\$ 30,190.00
	2008	80	\$ 1,818.16	\$ 102,640.00
	2009	80	\$ 980.69	\$ 43,126.00
	2010	80	\$ 2,659.63	\$ 100,000.00
	2011	81	\$ 891.35	\$ 50,000.00
	2012	82	\$ 2,461.52	\$ 118,793.00
	2013	82	\$ -	\$ -
	2014	82	\$ 1,943.99	\$ 118,386.00
	2015	82	\$ 36.59	\$ 3,000.00
	Total	809	\$ 1,267.09	\$ 118,793.00
			Change	-2878%
Capital Expenditures - Total	2006	80	\$112,006.80	\$ 7,628,735.00
	2007	80	\$ 91,567.66	\$ 3,319,021.00
	2008	80	\$ 27,113.05	\$ 891,455.00
	2009	80	\$ 14,122.29	\$ 392,401.00
	2010	80	\$ 25,635.64	\$ 533,337.00
	2011	81	\$ 12,534.84	\$ 427,823.00
	2012	82	\$ 18,296.62	\$ 514,893.00
	2013	82	\$ -	\$ -
	2014	82	\$ 92,794.33	\$ 7,147,527.00
	2015	82	\$ 39,882.68	\$ 1,921,579.00
	Total	809	\$ 43,301.35	\$ 7,628,735.00
			Change	-181%
Capital Revenue - Local	2006	80	\$ 42,490.70	\$ 2,848,337.00
	2007	80	\$ 44,271.09	\$ 3,319,021.00
	2008	80	\$ 3,882.24	\$ 242,004.00
	2009	80	\$ 9,527.19	\$ 387,671.00
	2010	80	\$ 6,286.94	\$ 243,955.00
	2011	81	\$ 2,642.15	\$ 200,414.00
	2012	82	\$ 15,479.48	\$ 514,893.00
	2013	82	\$ -	\$ -
	2014	82	\$ 92,615.29	\$ 7,147,527.00
	2015	82	\$ 30,325.05	\$ 1,921,579.00
	Total	809	\$ 24,822.11	\$ 7,147,527.00
			Change	-40%
Capital Revenue - State	2006	80	\$ -	\$ -
	2007	80	\$ -	\$ -
	2008	80	\$ -	\$ -
	2009	80	\$ -	\$ -
	2010	80	\$ 93.61	\$ 7,489.00
	2011	81	\$ 195.70	\$ 15,852.00
	2012	82	\$ -	\$ -
	2013	82	\$ -	\$ -
	2014	82	\$ -	\$ -
	2015	82	\$ -	\$ -
	Total	809	\$ 28.85	\$ 15,852.00
			Change	#DIV/0!
Capital Revenue - Federal	2006	80	\$ 22.70	\$ 1,816.00
	2007	80	\$ -	\$ -
	2008	80	\$ -	\$ -
	2009	80	\$ -	\$ -
	2010	80	\$ 3,777.93	\$ 302,234.00

	2011	81	\$ -	\$ -
	2012	82	\$ -	\$ -
	2013	82	\$ -	\$ -
	2014	82	\$ -	\$ -
	2015	82	\$ -	\$ -
	Total	809	\$ 375.83	\$ 302,234.00
		Change	#DIV/0!	
Capital Revenue - Other	2006	80	\$ 40,670.01	\$ 3,200,000.00
	2007	80	\$ 15,314.53	\$ 1,217,837.00
	2008	80	\$ 14,570.14	\$ 880,000.00
	2009	80	\$ 2,419.43	\$ 190,560.00
	2010	80	\$ 2,753.20	\$ 128,250.00
	2011	81	\$ 2,830.52	\$ 129,250.00
	2012	82	\$ 3,964.23	\$ 120,000.00
	2013	82	\$ 1,214.48	\$ 57,500.00
	2014	82	\$ 937.13	\$ 23,000.00
	2015	82	\$ 2,436.57	\$ 100,252.00
	Total	809	\$ 8,638.76	\$ 3,200,000.00
			Change	-1569%
Capital Revenue - Total	2006	80	\$ 83,183.41	\$ 6,048,337.00
	2007	80	\$ 59,585.61	\$ 3,319,021.00
	2008	80	\$ 18,452.38	\$ 880,000.00
	2009	80	\$ 11,946.61	\$ 387,671.00
	2010	80	\$ 12,911.68	\$ 309,723.00
	2011	81	\$ 5,668.37	\$ 200,414.00
	2012	82	\$ 19,443.71	\$ 514,893.00
	2013	82	\$138,374.78	\$10,258,440.00
	2014	82	\$ 93,552.43	\$ 7,147,527.00
	2015	82	\$ 32,761.62	\$ 1,921,579.00
	Total	809	\$ 47,768.09	\$10,258,440.00
			Change	-154%

### Registered Patrons and Service Hours

#### Descriptives

		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Registered Borrowers - Registered Borrowers	2006	80	4927.79	9452.79	2824.17	7031.4	0	51559
	2007	80	5302.35	9889.741	3101.5	7503.2	0	56519
	2008	80	5591.04	10488.51	3256.93	7925.14	0	58992
	2009	80	5528.89	10664.96	3155.52	7902.26	95	64545
	2010	80	5598.68	10833.06	3187.9	8009.45	87	63342
	2011	81	5769.17	12185.67	3074.7	8463.65	80	77000
	2012	82	5661.73	12179.6	2985.58	8337.88	87	75457
	2013	82	5880.66	12535.47	3126.31	8635	110	72700
	2014	82	5877.23	12356.69	3162.17	8592.3	98	77085
	2015	82	5622.99	11105.66	3182.81	8063.17	89	59581
	Total	809	5578.12	11167.77	4807.41	6348.83	0	77085
		Change	12%					

		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Registered Borrowers - Percent Registered	2006	80	47.9334	26.80078	41.9692	53.8976	0	141.72
	2007	80	49.7538	23.64375	44.4921	55.0154	0	141.72
	2008	80	52.9619	22.13126	48.0368	57.8869	0	135.16
	2009	80	52.2343	21.56979	47.4341	57.0344	13.79	112.92
	2010	80	52.1694	22.75973	47.1044	57.2343	14.41	136.4
	2011	81	47.866	21.81235	43.0429	52.6892	14.87	146.3
	2012	82	47.7013	24.80967	42.2501	53.1526	15.17	160.24
	2013	82	49.484	25.7582	43.8243	55.1437	15.39	169.33
	2014	82	50.0117	26.70658	44.1436	55.8798	15.25	187.09
	2015	82	51.2639	29.29326	44.8275	57.7003	14	205.18
	Total	809	50.13	24.60037	48.4323	51.8277	0	205.18
		Change	6%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Main - Weekly Hours	2006	80	37.95	12.37	35.2	40.7	15	64
	2007	80	38.3	12.665	35.48	41.12	15	64
	2008	80	38.5	12.703	35.67	41.33	15	64
	2009	80	38.85	12.452	36.08	41.62	15	64
	2010	80	39.15	12.146	36.45	41.85	15	64
	2011	81	39.52	11.878	36.89	42.14	15	64
	2012	82	40.23	11.374	37.73	42.73	15	63
	2013	82	40.45	11.327	37.96	42.94	15	63
	2014	82	40.02	11.487	37.5	42.55	15	63
	2015	82	40.22	11.334	37.73	42.71	15	63
	Total	809	39.33	11.943	38.5	40.15	15	64
		Change	6%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Branch - Weekly Hours	2006	80	7.4	20.444	2.85	11.95	0	126
	2007	80	7.16	19.925	2.73	11.6	0	126
	2008	80	8.08	20.942	3.41	12.74	0	126
	2009	80	8.18	21.19	3.46	12.89	0	126
	2010	80	8.26	21.496	3.48	13.05	0	126
	2011	81	8.99	21.486	4.24	13.74	0	116
	2012	82	9.09	21.932	4.27	13.9	0	120
	2013	82	9.66	24.788	4.21	15.1	0	160
	2014	82	9.17	22.041	4.33	14.01	0	120
	2015	82	8.96	21.699	4.2	13.73	0	120
	Total	809	8.5	21.533	7.02	9.99	0	160
		Change	17%					
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
2006		80	0.49	3.28	-0.24	1.22	0	28
2007		80	0.49	3.28	-0.24	1.22	0	28

Service Hours - Bookmobile - Weekly Hours	2008	80	0.46	3.276	-0.27	1.19	0	28
	2009	80	0.54	3.315	-0.2	1.28	0	28
	2010	80	0.53	3.315	-0.21	1.26	0	28
	2011	81	0.52	3.294	-0.21	1.25	0	28
	2012	82	0.51	3.274	-0.21	1.23	0	28
	2013	82	0.71	3.693	-0.1	1.52	0	28
	2014	82	1.02	5.004	-0.08	2.12	0	32
	2015	82	1.06	5.007	-0.04	2.16	0	32
	Total	809	0.63	3.727	0.38	0.89	0	32
Change		54%						
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - School - Weekly Hours	2006	80	0.65	4.653	-0.39	1.69	0	40
	2007	80	0.65	4.653	-0.39	1.69	0	40
	2008	80	0.65	4.653	-0.39	1.69	0	40
	2009	80	0.65	4.653	-0.39	1.69	0	40
	2010	80	0.65	4.653	-0.39	1.69	0	40
	2011	81	1.14	6.26	-0.25	2.52	0	40
	2012	82	0.95	6.055	-0.38	2.28	0	40
	2013	82	1.05	6.104	-0.29	2.39	0	40
	2014	82	1.51	7.34	-0.1	3.13	0	40
	2015	82	1.51	7.34	-0.1	3.13	0	40
Total	809	0.94	5.726	0.55	1.34	0	40	
Change		57%						
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - All - Weekly Hours	2006	80	46.49	27.393	40.39	52.58	15	179
	2007	80	46.6	27.206	40.55	52.65	15	179
	2008	80	47.69	28.143	41.42	53.95	15	179
	2009	80	48.21	27.974	41.99	54.44	15	179
	2010	80	48.59	28.221	42.31	54.87	15	179
	2011	81	50.16	29.776	43.58	56.74	15	169
	2012	82	50.78	29.847	44.22	57.34	15	181
	2013	82	51.87	32.785	44.66	59.07	15	221
	2014	82	51.73	32.218	44.65	58.81	15	213
	2015	82	51.76	31.818	44.76	58.75	15	213
Total	809	49.41	29.53	47.37	51.45	15	221	
Change		10%						
		N	Mean	Std. Deviation	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Service Hours - Annual Hours Open	2006	80	2417.35	1424.439	2100.36	2734.34	780	9308
	2007	80	2423.2	1414.737	2108.37	2738.03	780	9308
	2008	80	2479.75	1463.424	2154.08	2805.42	780	9308
	2009	80	2507.05	1454.629	2183.34	2830.76	780	9308
	2010	80	2526.55	1467.513	2199.97	2853.13	780	9308
	2011	81	2608.35	1548.331	2265.98	2950.71	780	8788
	2012	82	2640.59	1552.02	2299.57	2981.6	780	9412
	2013	82	2697.02	1704.841	2322.43	3071.62	780	11492

	2014	82	2690.05	1675.357	2321.93	3058.17	780	11076
	2015	82	2691.32	1654.535	2327.78	3054.86	780	11076
	Total	809	2569.28	1535.572	2463.3	2675.25	780	11492
	Change		10%					

### Library Resources

Descriptives					
		N	Mean	Minimum	Maximum
General - Number of Bookmobiles	2006	80	0.03	0	1
	2007	80	0.03	0	1
	2008	80	0.03	0	1
	2009	80	0.03	0	1
	2010	80	0.03	0	1
	2011	81	0.02	0	1
	2012	82	0.02	0	1
	2013	82	0.05	0	1
	2014	82	0.05	0	1
	2015	82	0.06	0	1
	Total	809	0.03	0	1
		Change	50%		
		N	Mean	Minimum	Maximum
General - Number of Branches	2006	80	0.36	0	4
	2007	80	0.36	0	4
	2008	80	0.38	0	4
	2009	80	0.38	0	4
	2010	80	0.38	0	4
	2011	81	0.38	0	4
	2012	82	0.39	0	6
	2013	82	0.39	0	5
	2014	82	0.4	0	6
	2015	82	0.39	0	6
	Total	809	0.38	0	6
		Change	8%		
		N	Mean	Minimum	Maximum
General - Service Population	2006	80	11253.78	156	123097
	2007	80	11253.78	156	123097
	2008	80	11253.78	156	123097
	2009	80	11253.78	156	123097
	2010	80	11253.78	156	123097
	2011	81	12274.4	494	141254
	2012	82	12124.71	494	141254
	2013	82	12124.71	494	141254
	2014	82	12153.99	494	141254
	2015	82	12055.28	494	141254
	Total	809	11705	156	141254
		Change	7%		
		N	Mean	Minimum	Maximum

Census/Estimated Population	2006	80	11664.44	160	131963
	2007	80	11798.38	159	133689
	2008	80	11931.61	155	136128
	2009	80	12017.24	151	138223
	2010	80	12197.69	161	141254
	2011	81	12225.59	491	143256
	2012	82	11965.93	492	139516
	2013	82	12239.22	158	144986
	2014	82	12160.77	166	143339
	2015	82	12255.15	163	145066
	Total	809	12046.91	151	145066
	Change	5%			
	N	Mean	Minimum	Maximum	
General - Square Footage of Library	2006	80	8063.38	450	66000
	2007	80	8492.85	500	66000
	2008	80	8588.08	500	68000
	2009	80	8605.2	500	68000
	2010	80	8670.14	500	68000
	2011	81	8586.19	500	68000
	2012	82	8629.65	500	68000
	2013	82	8626.51	500	68000
	2014	82	8636.39	500	68000
	2015	82	8670.13	500	68000
	Total	809	8557.72	450	68000
	Change	7%			

## Programs and Attendance

Descriptives							
	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs - Adult	2006	80	20.79	12.8	28.78	0	229
	2007	80	22.34	14.07	30.61	0	222
	2008	80	24.18	15.96	32.39	0	214
	2009	80	31.38	20.93	41.82	0	226
	2010	80	42.2	20.18	64.22	0	786
	2011	81	36.47	24.65	48.29	0	298
	2012	82	40.54	26.26	54.81	0	361
	2013	82	67.99	17.99	117.98	0	2028
	2014	82	46.15	31.29	61	0	414
	2015	82	50.96	34.3	67.63	0	462
	Total	809	38.43	31.99	44.86	0	2028
	Change	59%					
	N	Mean	95% Confidence Interval for Mean		Minimum	Maximum	
			Lower Bound	Upper Bound			
Programs - Children	2006	80	76.48	55.65	97.3	0	372

	2007	80	78.38	56.51	100.24	1	431
	2008	80	82.3	59.82	104.78	1	451
	2009	80	93.09	67.86	118.32	0	493
	2010	80	102.4	73.73	131.07	0	618
	2011	81	108.35	77.79	138.91	1	695
	2012	82	115.82	85.13	146.51	1	667
	2013	82	123.5	75.89	171.11	0	1716
	2014	82	114.01	85.25	142.77	0	682
	2015	82	131.39	95.19	167.59	0	792
	Total	809	102.76	93.25	112.28	0	1716
		Change	42%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs - Young Adult	2006	80	4.1	2.49	5.71	0	37
	2007	80	5.2	3.27	7.13	0	41
	2008	80	8.89	4.34	13.44	0	147
	2009	80	11.18	5.97	16.38	0	164
	2010	80	12.63	6.64	18.61	0	178
	2011	81	13.84	7.5	20.18	0	173
	2012	82	15.8	7.65	23.96	0	260
	2013	82	15.2	7.87	22.52	0	208
	2014	82	14.6	8.76	20.44	0	183
	2015	82	19.9	8.75	31.05	0	362
	Total	809	12.18	10.15	14.2	0	362
		Change	79%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs - Total	2006	80	101.36	73.23	129.49	0	600
	2007	80	105.91	76.16	135.67	1	544
	2008	80	115.36	83.01	147.71	1	690
	2009	80	135.64	99.32	171.96	0	678
	2010	80	157.23	113.11	201.34	0	857
	2011	81	158.65	116.56	200.75	1	793
	2012	82	172.16	128.12	216.2	1	849
	2013	82	206.68	105.67	307.7	0	3952
	2014	82	174.76	129.56	219.95	0	985
	2015	82	202.26	143.81	260.71	0	1350
	Total	809	153.36	137.44	169.29	0	3952
		Change	50%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Adult	2006	80	468.03	288.15	647.9	0	4333
	2007	80	630.71	353.36	908.06	0	8572
	2008	80	671.01	344.37	997.66	0	11069
	2009	80	799.26	390.45	1208.07	0	14310
	2010	80	832.68	330.34	1335.01	0	18705
	2011	81	908.09	399.7	1416.47	0	17996

	2012	82	968.94	441.92	1495.96	0	18658
	2013	82	1050.63	433.48	1667.79	0	17391
	2014	82	994.76	482.27	1507.25	0	17500
	2015	82	997.38	536.19	1458.57	0	15036
	Total	809	833.93	693.09	974.77	0	18705
	Change		53%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Children	2006	80	1870.69	1196.19	2545.19	0	14832
	2007	80	1905.18	1197.43	2612.92	5	14683
	2008	80	1982.81	1240.83	2724.79	0	15926
	2009	80	2124.91	1340.82	2909.01	0	18419
	2010	80	2064.94	1253.74	2876.13	0	20567
	2011	81	2120.65	1329.47	2911.84	5	19866
	2012	82	2242.26	1424.26	3060.25	6	18302
	2013	82	2359.22	1401.82	3316.62	0	28000
	2014	82	2530.57	1638.79	3422.35	0	18588
	2015	82	2578.83	1604.39	3553.26	0	24418
	Total	809	2180.4	1924.73	2436.08	0	28000
	Change		27%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Young Adult	2006	80	109.98	36.74	183.21	0	2577
	2007	80	163.19	59.6	266.78	0	3250
	2008	80	217.83	72.12	363.53	0	4456
	2009	80	257.81	101.7	413.93	0	4692
	2010	80	262.05	69.83	454.27	0	7148
	2011	81	285.83	57.34	514.31	0	8798
	2012	82	271.74	20.93	522.56	0	10117
	2013	82	262.35	33.53	491.18	0	9160
	2014	82	258.15	62.09	454.2	0	7762
	2015	82	250.5	37.45	463.55	0	8303
	Total	809	234.27	175.85	292.69	0	10117
	Change		56%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Programs Attendance - Total	2006	80	2448.69	1606.35	3291.02	0	17581
	2007	80	2699.08	1710.1	3688.05	5	22679
	2008	80	2871.65	1781.82	3961.48	0	29304
	2009	80	3181.99	1987.11	4376.87	0	31088
	2010	80	3159.66	1802.29	4517.04	0	41260
	2011	81	3314.57	1926.3	4702.84	5	42803
	2012	82	3482.94	2021.2	4944.68	6	45787
	2013	82	3672.21	2043.41	5301	0	43425
	2014	82	3783.48	2338.39	5228.56	0	35584
	2015	82	3826.71	2347.59	5305.83	0	31857
	Total	809	3248.61	2840	3657.21	0	45787



		Change	36%			
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## Circulation

Descriptives							
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Juvenile - Annual	2006	80	22824.81	10951.08	34698.55	0	307161
	2007	80	23719.86	11106.78	36332.95	0	322794
	2008	80	23093.53	10845.59	35341.46	0	322858
	2009	80	25381.78	11580.87	39182.68	0	338926
	2010	80	25810.84	12011.27	39610.41	0	318320
	2011	81	25910.88	11722.75	40099	0	326088
	2012	82	25028.17	12122.3	37934.04	-1	290908
	2013	82	24904.65	11582.94	38226.36	0	311219
	2014	82	25807.89	11761.56	39854.22	0	312584
	2015	82	25933.41	11738.25	40128.58	0	320902
	Total	809	24848.61	20712.53	28984.69	-1	338926
		Change	12%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Non-juvenile - Annual	2006	80	45587.16	23858.22	67316.1	153	598675
	2007	80	46358.26	24064.31	68652.22	250	624090
	2008	80	49807.54	25655.51	73959.56	265	628679
	2009	80	52669.68	27450.45	77888.9	250	641002
	2010	80	58591.65	27525.12	89658.18	178	920827
	2011	81	66916.52	19694.23	114138.81	588	1746477
	2012	82	66866.35	17603.47	116129.24	679	1895584
	2013	82	51410.16	24094.85	78725.47	725	836787
	2014	82	46651.35	24791.6	68511.1	0	501649
	2015	82	48135.24	24183.36	72087.13	0	625244
	Total	809	53315.89	43660.83	62970.96	0	1895584
		Change	5%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Total	2006	80	68411.98	34900.15	101923.8	257	905836
	2007	80	70078.13	35277.84	104878.41	649	946884
	2008	80	72901.06	36825.86	108976.27	690	951537
	2009	80	78051.45	39165.58	116937.32	650	979928
	2010	80	84402.49	40035.58	128769.4	658	1205188
	2011	81	92827.4	33345.2	152309.59	900	2045346
	2012	82	91894.52	32197.93	151591.12	1094	2151460
	2013	82	76314.8	36002.99	116626.62	1252	1148006
	2014	82	72459.24	36676.92	108241.57	426	814233
	2015	82	74068.66	36085.6	112051.71	512	943285
	Total	809	78164.5	64762.9	91566.1	257	2151460

		Change	8%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Circulation - Per Capita (Service Population)	2006	80	6.2776	5.283	7.2722	1.33	29.08
	2007	80	6.0115	5.0656	6.9574	0.38	34.21
	2008	80	6.3279	5.3966	7.2592	0.4	31.36
	2009	80	6.5946	5.6971	7.4922	0.38	26.56
	2010	80	6.937	5.7761	8.0979	0.38	35.32
	2011	81	6.4637	5.3829	7.5445	1.62	34.67
	2012	82	6.4121	5.3807	7.4435	1.78	37.3
	2013	82	6.023	5.0523	6.9938	1.91	36.03
	2014	82	5.9749	4.9173	7.0325	0.86	37.89
	2015	82	6.1645	4.9837	7.3453	1.03	41.91
	Total	809	6.3171	5.997	6.6372	0.38	41.91
	Change		-2%				
Circulation - Per Capita (Census/Estimated Population)	2006	80	8.5757	4.9463	12.2052	0.52	124.52
	2007	80	8.0849	4.4074	11.7623	0.52	146.93
	2008	80	8.2416	4.768	11.7153	0.56	138.56
	2009	80	8.5297	5.3603	11.6992	0.52	120.66
	2010	80	8.9859	5.0909	12.8809	0.49	150.3
	2011	81	6.502	5.4145	7.5895	1.51	34.82
	2012	82	6.4852	5.449	7.5215	1.44	37.49
	2013	82	8.2785	4.298	12.259	0.97	162.95
	2014	82	8.258	4.2596	12.2565	0.87	162.48
	2015	82	8.5459	4.0536	13.0381	1.03	183.39
	Total	809	8.0453	6.977	9.1135	0.49	183.39
	Change		0%				
Circulation - Electronic	2006	0	.	.	.	.	.
	2007	0	.	.	.	.	.
	2008	0	.	.	.	.	.
	2009	0	.	.	.	.	.
	2010	0	.	.	.	.	.
	2011	0	.	.	.	.	.
	2012	0	.	.	.	.	.
	2013	82	3,982.01	1765.17	6198.85	0	5,9451
	2014	82	9,566.8	256.62	18876.99	0	37,4769
	2015	82	7,362.88	3534.68	11191.07	0	9,4329
	Total	246	6,970.57	3570.79	10370.34	0	37,4769
	Change		46%				
Laptop/Device Checkout – Annually	2006	0	.	.	.	.	.
	2007	0	.	.	.	.	.
	2008	0	.	.	.	.	.
	2009	0	.	.	.	.	.
	2010	0	.	.	.	.	.
	2011	0	.	.	.	.	.
	2012	0	.	.	.	.	.
	2013	0	.	.	.	.	.
	2014	82	163.45	12.15	314.75	0	5250
	2015	82	108.46	7.12	209.81	0	3600
	Total	164	135.96	45.77	226.14	0	5250
	Change		-51%				

## Library Automation

Descriptives									
		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
Automation - Number of Internet Computers	2006	80	10.15	11.684	1.306	7.55	12.75	0	73
	2007	80	10.70	12.345	1.380	7.95	13.45	0	69
	2008	80	11.86	13.093	1.464	8.95	14.78	1	69
	2009	80	12.53	13.311	1.488	9.56	15.49	1	69
	2010	80	13.75	15.067	1.685	10.40	17.10	1	76
	2011	81	15.10	16.628	1.848	11.42	18.78	1	85
	2012	82	15.56	16.271	1.797	11.99	19.14	1	93
	2013	82	15.28	16.075	1.775	11.75	18.81	1	99
	2014	82	16.55	18.941	2.092	12.39	20.71	1	108
	2015	82	16.44	19.046	2.103	12.25	20.62	2	113
Total	809	13.81	15.546	.547	12.74	14.89	0	113	
Automation - Online Full Text Databases	2006	80	8.26	9.385	1.049	6.17	10.35	0	66
	2007	80	9.93	12.104	1.353	7.23	12.62	0	69
	2008	80	10.66	11.735	1.312	8.05	13.27	0	69
	2009	80	10.58	11.262	1.259	8.07	13.08	0	69
	2010	80	12.63	14.216	1.589	9.46	15.79	0	76
	2011	81	13.38	15.895	1.766	9.87	16.90	0	85
	2012	82	13.84	15.007	1.657	10.54	17.14	0	93
	2013	82	.00	.000	.000	.00	.00	0	0
	2014	82	.00	.000	.000	.00	.00	0	0
	2015	82	.00	.000	.000	.00	.00	0	0
Total	809	7.89	12.076	.425	7.06	8.72	0	93	
Public Internet Computer Users - Weekly	2006	80	256.50	489.456	54.723	147.58	365.42	3	3060
	2007	80	314.43	570.843	63.822	187.39	441.46	2	3011
	2008	80	309.06	571.863	63.936	181.80	436.32	3	3260
	2009	80	323.79	601.946	67.300	189.83	457.74	4	3618
	2010	80	326.63	581.776	65.045	197.16	456.09	4	3155
	2011	81	323.31	566.357	62.929	198.08	448.54	2	3250
	2012	82	370.46	707.898	78.174	214.92	526.01	3	4328
	2013	82	347.91	690.498	76.253	196.20	499.63	0	4400

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	2014	82	448.37	1264.987	139.694	170.42	726.31	0	10098
	2015	82	271.23	418.650	46.232	179.24	363.22	0	2350
	Total	809	329.46	682.741	24.004	282.34	376.58	0	10098
Public Internet Computer Users - Yearly	2006	80	13338.00	25451.699	2845.586	7674.00	19002.00	156	159120
	2007	80	16350.10	29683.854	3318.756	9744.28	22955.92	104	156572
	2008	80	16071.25	29736.866	3324.683	9453.63	22688.87	156	169520
	2009	80	16836.95	31301.207	3499.581	9871.21	23802.69	208	188136
	2010	80	16984.50	30252.371	3382.318	10252.16	23716.84	208	164060
	2011	81	16812.05	29450.580	3272.287	10299.99	23324.11	104	169000
	2012	82	19264.10	36810.697	4065.061	11175.90	27352.29	156	225056
	2013	82	18091.56	35905.890	3965.142	10202.17	25980.95	0	228800
	2014	82	23315.02	65779.323	7264.111	8861.72	37768.33	0	525096
	2015	82	14104.05	21769.788	2404.071	9320.70	18887.40	0	122200
	Total	809	17131.98	35502.551	1248.203	14681.87	19582.08	0	525096
Automation - Internet Terminals - Public	2006	80	9.13	10.443	1.168	6.80	11.45	1	66
	2007	80	9.78	11.536	1.290	7.21	12.34	1	69
	2008	80	10.69	11.362	1.270	8.16	13.22	1	69
	2009	80	11.20	11.571	1.294	8.63	13.77	1	69
	2010	80	12.58	14.243	1.592	9.41	15.74	1	76
	2011	81	14.14	15.773	1.753	10.65	17.62	1	85
	2012	82	15.22	15.954	1.762	11.71	18.72	1	93
	2013	82	14.54	15.237	1.683	11.19	17.88	0	99
	2014	82	15.63	18.411	2.033	11.59	19.68	1	108
	2015	82	15.71	18.790	2.075	11.58	19.84	2	113
Total	809	12.89	14.755	.519	11.87	13.90	0	113	
Automation - Internet Terminals - Staff	2006	80	5.48	7.956	.889	3.70	7.25	1	45
	2007	80	5.81	8.735	.977	3.87	7.76	0	47
	2008	80	5.91	8.054	.900	4.12	7.70	0	36
	2009	80	6.34	9.142	1.022	4.30	8.37	0	51
	2010	80	6.61	8.987	1.005	4.61	8.61	1	45
	2011	81	6.54	8.853	.984	4.59	8.50	1	41
	2012	82	7.07	8.977	.991	5.10	9.05	1	39
	2013	82	6.82	8.481	.937	4.95	8.68	0	37
	2014	82	6.83	9.084	1.003	4.83	8.83	1	49
	2015	82	7.49	11.610	1.282	4.94	10.04	1	64
Total	809	6.50	9.013	.317	5.87	7.12	0	64	

**Wired and Wireless**

Descriptives							
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Patron Upload Wired	2006		
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	7.71	3.36	12.05	0	100
	2014	82	20.28	-4.17	44.73	0	1000
	2015	82	20.51	-3.88	44.9	0	1000
	Total	809	4.92	1.41	8.42	0	1000
	Change		62%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Patron Upload Wireless	2006		
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	6.88	2.65	11.1	0	100
	2014	82	20.01	-4.44	44.47	0	1000
	2015	82	19.48	-4.91	43.86	0	1000
	Total	809	4.7	1.2	8.2	0	1000
	Change		65%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Patron Download Wired	2006		
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	11.62	7.26	15.99	0	100
	2014	82	23.62	-0.67	47.91	0	1000
	2015	82	28.5	4.16	52.84	0	1000
	Total	809	6.46	2.94	9.98	0	1000
	Change		59%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
				Patron Download Wireless	2006		
	2007	80	0	0	0	0	0

	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	11.44	7.07	15.8	0	100
	2014	82	22.71	-1.6	47.01	0	1000
	2015	82	25.32	1.02	49.61	0	1000
	Total	809	6.03	2.52	9.54	0	1000
		Change	55%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Upload Wired	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	18.85	-5.53	43.24	0	1000
	2014	82	20.45	-3.99	44.9	0	1000
	2015	82	21.57	-2.89	46.04	0	1000
	Total	809	6.17	1.91	10.43	0	1000
			Change	13%			
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Upload Wireless	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	17.73	-6.66	42.12	0	1000
	2014	82	20.06	-4.39	44.52	0	1000
	2015	82	20.67	-3.79	45.13	0	1000
	Total	809	5.93	1.67	10.18	0	1000
			Change	14%			
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Download Wired	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	22.34	-1.97	46.65	0	1000
	2014	82	23.26	-1.04	47.55	0	1000
	2015	82	29.13	4.72	53.54	0	1000
	Total	809	7.57	3.31	11.84	0	1000

		Change	23%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Staff Download Wireless	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	21.8	-2.52	46.13	0	1000
	2014	82	22.13	-2.18	46.45	0	1000
	2015	82	25.84	1.48	50.2	0	1000
	Total	809	7.07	2.82	11.33	0	1000
		Change	16%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Wireless Sessions – Annually	2006	80	0	0	0	0	0
	2007	80	0	0	0	0	0
	2008	80	0	0	0	0	0
	2009	80	0	0	0	0	0
	2010	80	0	0	0	0	0
	2011	81	0	0	0	0	0
	2012	82	0	0	0	0	0
	2013	82	0	0	0	0	0
	2014	82	2686.07	664.75	4707.4	0	67942
	2015	82	3477.74	1166.31	5789.18	0	61344
	Total	809	624.76	307.41	942.12	0	67942
		Change	23%				

### Interlibrary Loans

Descriptives							
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Loans - In State	2006	80	1083.04	168.13	1997.94	0	29848
	2007	80	1377.65	198.02	2557.28	0	37109
	2008	80	1314.46	336.46	2292.46	0	33059
	2009	80	2059.46	523.33	3595.59	0	48722
	2010	80	2607.48	704.16	4510.79	0	61498
	2011	81	2295.8	382.37	4209.24	0	59124
	2012	82	2298.96	380.26	4217.67	0	56317
	2013	82	2843.72	685.24	5002.2	-1	66599
	2014	82	2609.48	490.43	4728.52	0	65927
	2015	82	2707.04	545.11	4868.96	0	68508
Total	809	2124.82	1580.42	2669.22	-1	68508	
		Change	60%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum

				Lower Bound	Upper Bound		
Interlibrary Loans - Loans - Out of State	2006	80	58.35	27.35	89.35	0	787
	2007	80	63.38	27.09	99.66	0	957
	2008	80	70.3	33.43	107.17	0	946
	2009	80	69.85	35	104.7	0	921
	2010	80	72.03	31.84	112.21	0	1445
	2011	81	65.95	27.04	104.86	0	1240
	2012	82	77.51	31.63	123.39	0	1396
	2013	82	83.06	28.21	137.91	-1	1991
	2014	82	71.45	33.76	109.14	0	1143
	2015	82	73.6	37.16	110.04	0	1199
	Total	809	70.6	58.22	82.98	-1	1991
		Change	21%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Loans - Total	2006	80	1141.39	205.09	2077.69	0	30635
	2007	80	1441.03	236.64	2645.41	0	38066
	2008	80	1384.76	382.7	2386.82	0	34005
	2009	80	2129.31	572.45	3686.18	0	49522
	2010	80	2679.5	763.93	4595.07	0	61870
	2011	81	2361.75	422.45	4301.05	0	60364
	2012	82	2376.48	429.16	4323.79	0	57713
	2013	82	2926.78	728.71	5124.85	-2	68590
	2014	82	2680.93	541.35	4820.51	0	66803
	2015	82	2780.63	591.87	4969.4	0	69707
	Total	809	2195.42	1643.52	2747.33	-2	69707
		Change	59%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Borrows - In State	2006	80	1106.01	192.44	2019.59	0	27721
	2007	80	1258.53	134.87	2382.18	0	37038
	2008	80	1568.74	114.55	3022.92	0	43109
	2009	80	2020.66	314.7	3726.62	0	55035
	2010	80	2563.73	484.13	4643.32	0	61814
	2011	81	2225.11	90.48	4359.74	0	67046
	2012	82	2301.01	223.17	4378.85	0	64900
	2013	82	2668	417.6	4918.4	-1	65215
	2014	82	2691.38	430.76	4951.99	0	64701
	2015	82	2723.33	399.79	5046.87	0	68727
	Total	809	2117.57	1526.08	2709.06	-1	68727
		Change	59%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Borrows - Out of State	2006	80	873.94	-571.16	2319.03	0	58172
	2007	80	159.23	91.07	227.38	0	1619
	2008	80	162.15	77.86	246.44	0	2417



	2009	80	167.56	91.69	243.44	0	1775
	2010	80	124.26	71.9	176.63	0	1445
	2011	81	154.35	68.03	240.67	0	2511
	2012	82	127.83	72.39	183.27	0	1168
	2013	82	120.77	63.41	178.13	-1	1295
	2014	82	129.88	66.34	193.41	0	1570
	2015	82	120.66	61.71	179.61	0	1401
	Total	809	213.11	70.75	355.46	-1	58172
		Change	-624%				
		N	Mean	95% Confidence Interval for Mean		Minimum	Maximum
				Lower Bound	Upper Bound		
Interlibrary Loans - Total	2006	80	1979.95	270.14	3689.76	0	58344
	2007	80	1417.75	258.48	2577.02	0	37526
	2008	80	1730.89	231.57	3230.2	0	44645
	2009	80	2188.23	440.5	3935.95	0	55593
	2010	80	2687.99	597.76	4778.21	0	62289
	2011	81	2379.46	208.04	4550.87	0	67490
	2012	82	2428.84	326.51	4531.18	0	65313
	2013	82	2788.77	515.18	5062.36	-2	65523
	2014	82	2821.26	535.83	5106.68	0	65549
	2015	82	2843.99	492.41	5195.57	0	69910
	Total	809	2330.67	1715.25	2946.1	-2	69910
		Change	30%				

### E4 - Statistically Significant Correlations Between Inputs, Outputs, and Quality-of-Life (2006-2015)

		Income - Per Capita (Service Population)	Income - Per Capita (Census/Estimated Population)
Circulation - Per Capita (Service Population)	Pearson Correlation	.523**	.533**
	Sig. (2-tailed)	.000	.000
	N	809	809
Circulation - Per Capita (Census/Estimated Population)	Pearson Correlation	.468**	.808**
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Service Population)	Pearson Correlation	.596**	.390**
	Sig. (2-tailed)	.000	.000
	N	809	809
Collection - Per Capita (Census/Estimated Population)	Pearson Correlation	.507**	.779**
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	Pearson Correlation	.904**	.582**
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	Pearson Correlation	.606**	.902**
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	Pearson Correlation	.520**	.562**
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Service Population)	Pearson Correlation	.511**	.547**
	Sig. (2-tailed)	.000	.000
	N	809	809
Visits - Annual Per Capita (Census/Estimated Population)	Pearson Correlation	.417**	.750**
	Sig. (2-tailed)	.000	.000
	N	809	809

		Service Hours - Main - Weekly Hours	Service Hours - Branch - Weekly Hours	Service Hours - Bookmobile - Weekly Hours
Automation - Number of Internet Computers	Pearson Correlation	.564**	.624**	.491**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Online Full Text Databases	Pearson Correlation	.388**	.447**	.140**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Weekly	Pearson Correlation	.450**	.544**	.347**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Public Internet Computer Users - Yearly	Pearson Correlation	.450**	.544**	.347**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Internet Terminals - Public	Pearson Correlation	.530**	.628**	.417**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Automation - Internet Terminals - Staff	Pearson Correlation	.598**	.592**	.522**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Wireless Sessions – Annually	Pearson Correlation		.313**	.440**
	Sig. (2-tailed)		.000	.000
	N		809	809

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Circulation - Juvenile - Annual	Pearson Correlation	.518**	.523**	.631**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Non-juvenile - Annual	Pearson Correlation	.459**	.547**	.486**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Total	Pearson Correlation	.491**	.556**	.545**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Circulation - Electronic	Pearson Correlation	.345**	.544**	.712**
	Sig. (2-tailed)	.000	.000	.000
	N	246	246	246
Collection - Print	Pearson Correlation	.588**	.584**	.631**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Print Serials	Pearson Correlation	.596**	.585**	.451**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Collection - Audios	Pearson Correlation	.509**	.294**	.732**
	Sig. (2-tailed)	.000	.000	.000
	N	320	320	320
Audios - Physical Units	Pearson Correlation	.523**	.589**	.638**
	Sig. (2-tailed)	.000	.000	.000
	N	489	489	489
Income - County	Pearson Correlation	.441**	.752**	.333**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Per Capita/Per Square Mile	Pearson Correlation	.424**	.467**	.665**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Income - State - Total	Pearson Correlation	.424**	.547**	.368**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Programs - Program Attendance - Total	Pearson Correlation	.552**	.555**	.467**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total FTE w/MLS	Pearson Correlation	.505**	.539**	.543**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Staff - Total Paid Staff	Pearson Correlation	.584**	.667**	.522**
	Sig. (2-tailed)	.000	.000	.000
	N	164	164	164
Visits - Weekly	Pearson Correlation	.572**	.638**	.481**
	Sig. (2-tailed)	.000	.000	.000
	N	809	809	809
Visits - Yearly	Pearson Correlation	.572**	.638**	.481**
	Sig. (2-tailed)	.000	.000	.000

		Visits - Annual Per Capita (Service Population)	Visits - Annual Per Capita (Census/Estimated Population)
Collection - Per Capita (Service Population)	Pearson Correlation	.444**	.300**
	Sig. (2-tailed)	.000	.000
	N	809	809
	Pearson Correlation	.511**	.670**

Montana State Library LSTA Evaluation Report (2013-2017) – Final Draft (3.10.17)

Collection - Per Capita (Census/Estimated Population)	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Service Population)	Pearson Correlation	.571**	.458**
	Sig. (2-tailed)	.000	.000
	N	809	809
Expenditures - Per Capita (Census/Estimated Population)	Pearson Correlation	.621**	.836**
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Service Population)	Pearson Correlation	.511**	.417**
	Sig. (2-tailed)	.000	.000
	N	809	809
Income - Per Capita (Census/Estimated Population)	Pearson Correlation	.547**	.750**
	Sig. (2-tailed)	.000	.000
	N	809	809
Registered Borrowers - Percent Registered	Pearson Correlation	.561**	.542**
	Sig. (2-tailed)	.000	.000
	N	809	809

		Programs - Adult	Programs - Children	Programs - Young Adult	Programs - Total	Programs - Attendance - Adult	Programs - Attendance - Children	Programs - Attendance - Young Adult	Programs - Attendance - Total	Registered Borrowers - Registered Borrowers
Income - State - Per Capita/Per Square Mile	Pearson Correlation	.433**	.604**	.486**	.598**	.525**	.713**	.301**	.670**	.751**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total FTE w/MLS	Pearson Correlation	.531**	.728**	.525**	.716**	.729**	.888**	.472**	.874**	.860**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Librarian FTE	Pearson Correlation	.510**	.753**	.524**	.723**	.683**	.865**	.461**	.843**	.842**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	809	809	809	809	809	809	809	809	809
Staff - Other Staff	Pearson Correlation	.540**	.719**	.528**	.715**	.700**	.856**	.452**	.842**	.931**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809
Staff - Total Paid Staff	Pearson Correlation	.550**	.760**	.548**	.746**	.722**	.894**	.473**	.876**	.935**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	0.000
	N	809	809	809	809	809	809	809	809	809

		Programs - Programs - Adult	Programs - Programs - Children	Programs - Programs - Young Adult	Programs - Programs - Total	Programs - Program Attendance - Adult	Programs - Program Attendance - Children	Programs - Program Attendance - Young Adult	Programs - Program Attendance - Total
EMPLOYMENT STATUS - Population 16 years and over - In labor force	Pearson Correlation	.683**	.591**	.266	.638**	.688**	.744**	.174	.751**
	Sig. (2-tailed)	.000	.002	.199	.001	.000	.000	.406	.000

Montana State Library LSTA Evaluation Report (2013-2017) – Final Draft (3.10.17)

EMPLOYMENT STATUS - Population 16 years and over - In labor force - Civilian labor force - Unemployed	N	25	25	25	25	25	25	25	25
	Pearson Correlation	.736**	.695**	.254	.728**	.754**	.840**	.173	.841**
	Sig. (2-tailed)	.000	.000	.220	.000	.000	.000	.409	.000
SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - Elementary school (grades 1-8) -Percent	N	25	25	25	25	25	25	25	25
	Pearson Correlation	-.466*	-.491*	-.053	-.490*	-.365	-.387	.190	-.375
	Sig. (2-tailed)	.019	.013	.803	.013	.073	.056	.364	.065
SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent	N	25	25	25	25	25	25	25	25
	Pearson Correlation	.774**	.584**	.275	.660**	.630**	.647**	.062	.655**
	Sig. (2-tailed)	.000	.002	.184	.000	.001	.000	.768	.000
EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent	N	25	25	25	25	25	25	25	25
	Pearson Correlation	.671**	.554**	.260	.609**	.662**	.716**	.162	.723**
	Sig. (2-tailed)	.000	.004	.209	.001	.000	.000	.438	.000
INCOME AND BENEFITS (IN 2013 INFLATION-ADJUSTED DOLLARS) - Total households - Median household income (dollars)	N	25	25	25	25	25	25	25	25
	Pearson Correlation	.535**	.197	.264	.313	.329	.317	.087	.329
	Sig. (2-tailed)	.006	.346	.202	.128	.108	.123	.680	.108

		<b>SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree -Percent</b>	<b>EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma -Percent</b>
<b>Circulation - Juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.784**</b>	<b>.862**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Non-juvenile - Annual</b>	<b>Pearson Correlation</b>	<b>.789**</b>	<b>.850**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Total</b>	<b>Pearson Correlation</b>	<b>.790**</b>	<b>.856**</b>	
	Sig. (2-tailed)	.000	.000	
	N	25	25	
<b>Circulation - Per Capita (Service Population)</b>	<b>Pearson Correlation</b>			<b>-.415*</b>
	Sig. (2-tailed)			.039
	N			25

		SCHOOL ENROLLMENT - Population 3 years and over enrolled in school - College or graduate school -Percent	EDUCATIONAL ATTAINMENT - Population 25 years and over - Bachelor's degree - Percent
Staff - Total FTE w/MLS	Pearson Correlation	.757**	.823**
	Sig. (2-tailed)	.000	.000
	N	25	25
Service Hours - Main - Weekly Hours	Pearson Correlation	.474*	.467*
	Sig. (2-tailed)	.017	.019
	N	25	25

		EDUCATIONAL ATTAINMENT - Population 25 years and over - 9th to 12th grade, no diploma - Percent	INCOME AND BENEFITS (IN 2013 INFLATION- ADJUSTED DOLLARS) - Total households - Mean household income (dollars)
Registered Borrowers - Percent Registered	Pearson Correlation	-.453*	.405*
	Sig. (2-tailed)	.023	.045
	N	25	25

# Montana Library Federations

An analysis of the State FY2016 Annual Reports



# Federation Spending by Categories



[Click Here to Unlock Map](#)





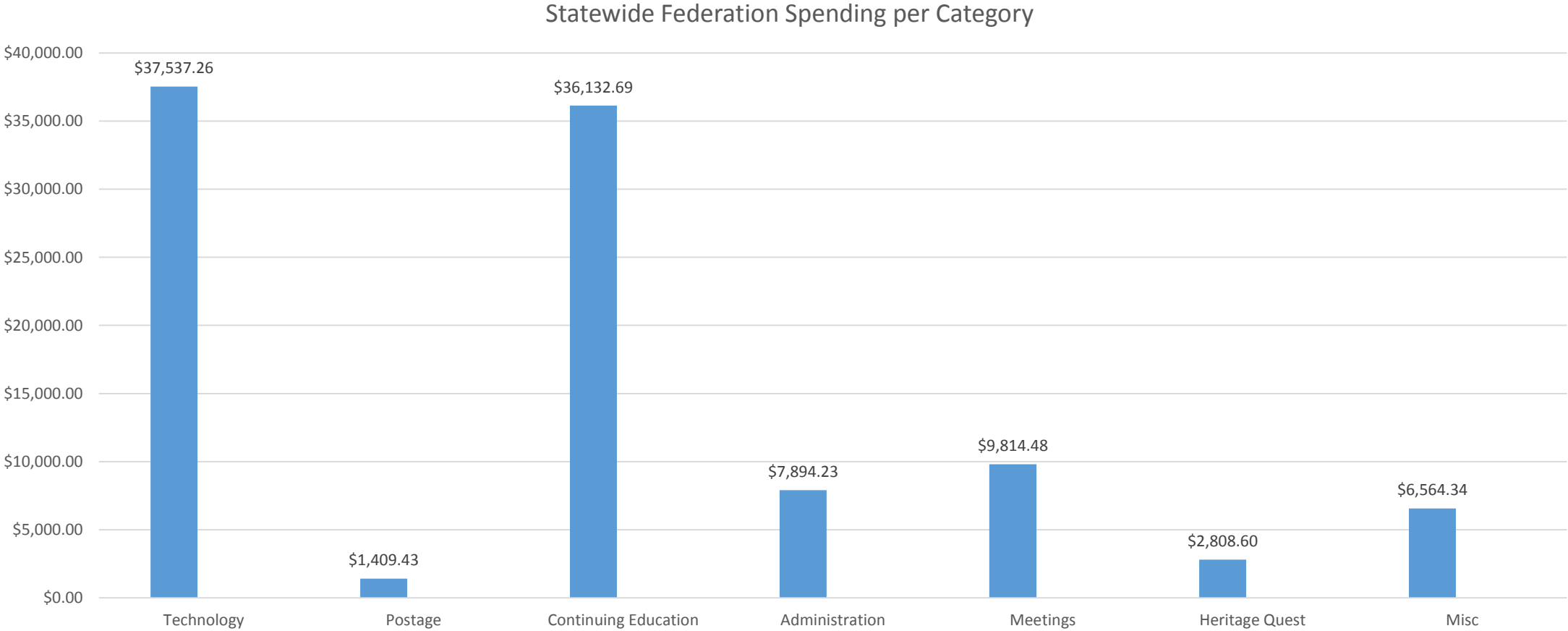
# Data behind map

Federation	Technology	Postage for Resource Sharing	Continuing Education	Admininstration	Meetings	Heritage Quest	Misc
Broad Valleys	\$6,045.02	\$0.00	\$9,005.30	\$800.00	\$4,572.93	\$1,096.00	\$0.00
Golden Plains	\$4,680.64	\$1,100.00	\$5,364.94	\$1,213.76	\$0.00	\$573.00	\$698.74
Pathfinder	\$8,980.38	\$34.20	\$8,149.90	\$1,212.77	\$400.00	\$0.00	\$0.00
Sagebrush	\$3,473.77	\$0.00	\$1,682.93	\$1,255.33	\$489.06	\$350.02	\$0.00
South Central	\$9,048.73	\$275.23	\$5,058.72	\$3,412.37	\$448.14	\$789.58	\$4,017.60
Tamarack	\$5,308.72	\$0.00	\$6,870.90	\$0.00	\$3,904.35	\$0.00	\$1,848.00


# What's in the categories?

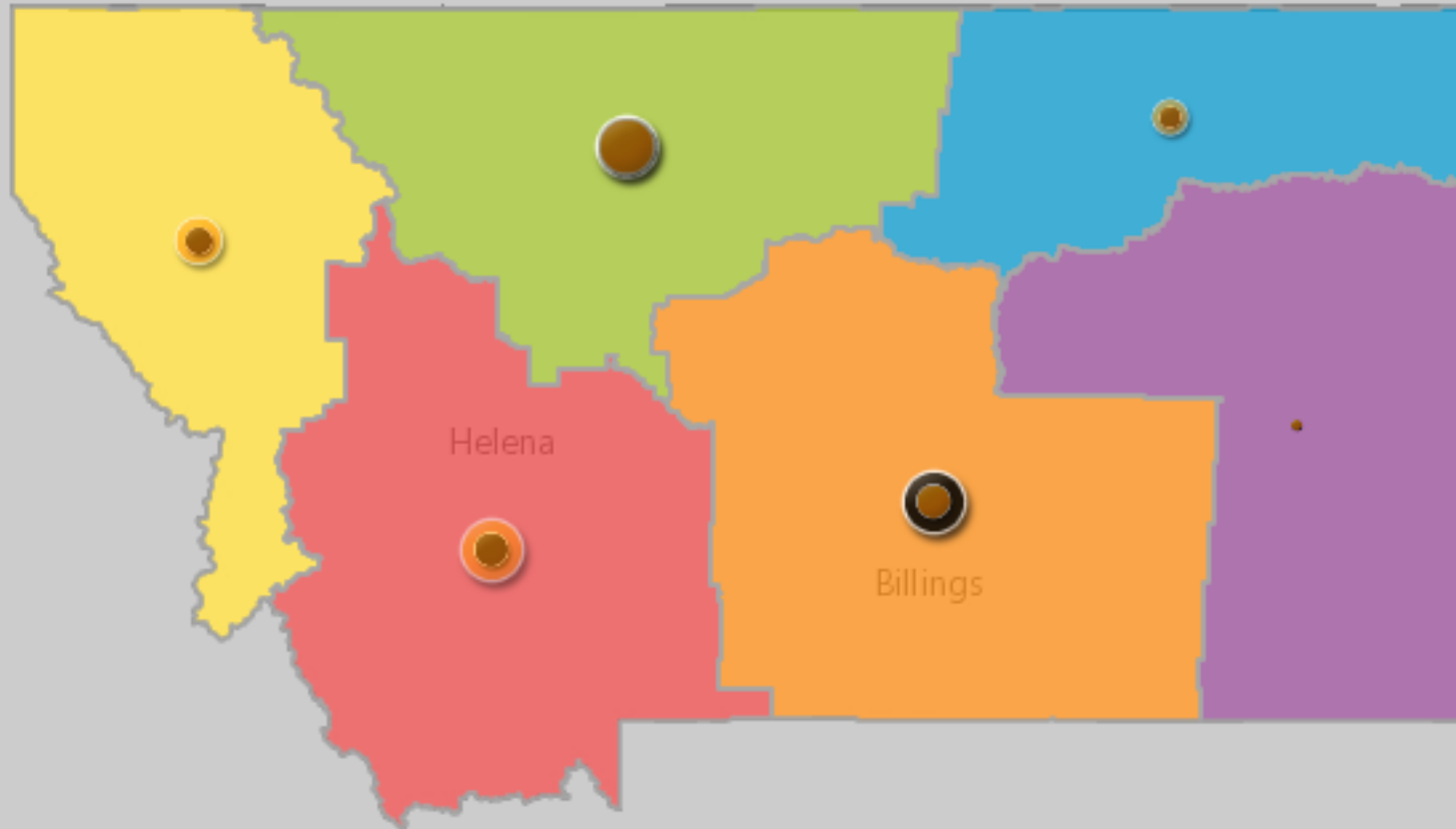
- Technology includes hardware, software (non MSL), Internet costs, or tech support. It does NOT include the MSC or other statewide projects.
- Postage includes postage costs for ILL.
- Continuing education includes librarian/board member costs for attending MLA, federation meetings, or other library events.
- Administration includes coordinator stipends; supplies; communication
- Meetings includes hotel costs, food, etc. for federation meetings. Primarily for the 2 federations that only meet once a year face to face and provide an intensive learning experience
- Heritage Quest includes costs for genealogy database
- Miscellaneous includes outreach programs, summer reading, book club kits

# Statewide spending for each category

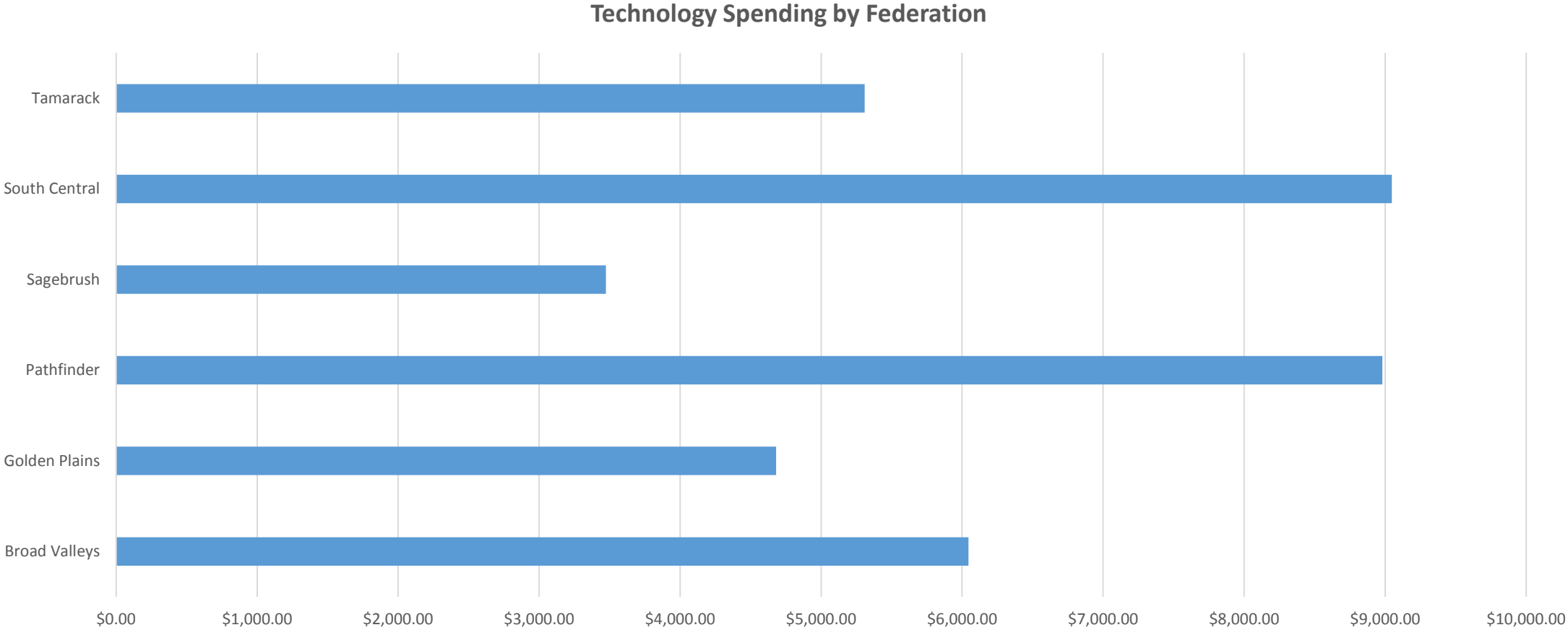


# Comparison of federation spending on technology versus continuing education

 [Click Here to Unlock Map](#)

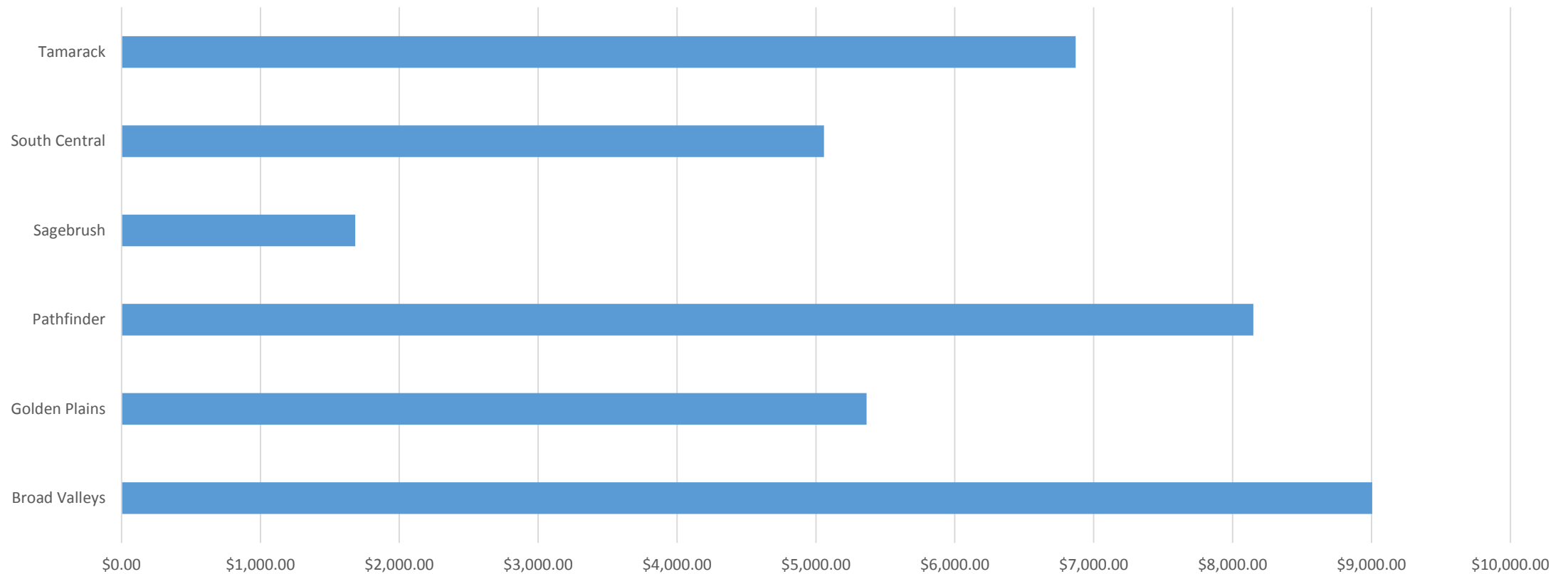


# How much does each federation spend on technology?



# How much does each federation spend on continuing education?

Continuing Education Spending by Federation



# Federation Spending for MSL Projects/Services



Click Here to Unlock Map

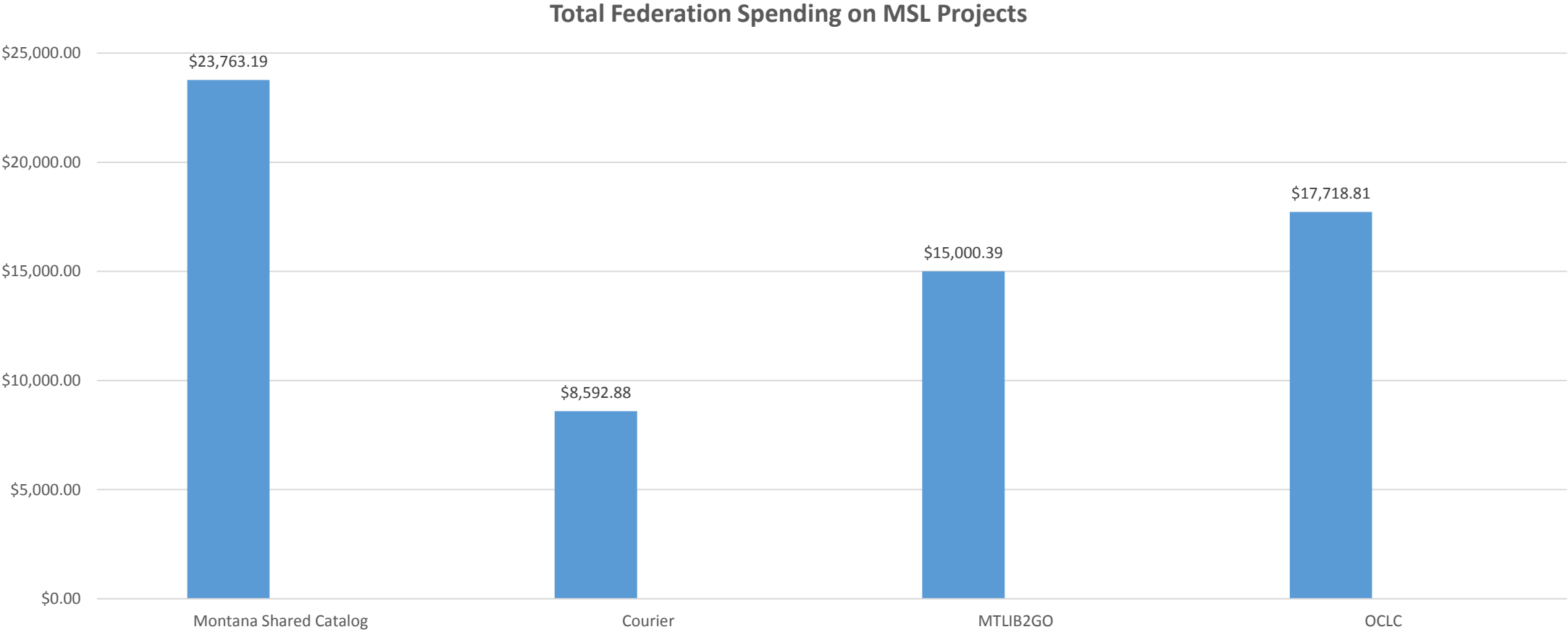


# Data behind map


Federation	Montana Shared Catalog	Courier	MTLIB2GO	OCLC	
Broad Valleys	\$5,905.14	\$1,309.00		\$2,928.55	\$4,551.00
Golden Plains	\$0.00	\$0.00		\$2,905.36	\$894.00
Pathfinder	\$1,008.95	\$0.00		\$367.70	\$7,115.66
Sagebrush	\$5,832.10	\$351.38		\$306.00	\$2,337.00
South Central	\$3,258.25	\$0.00		\$3,290.19	\$1,799.15
Tamarack	\$7,758.75	\$6,932.50		\$5,202.59	\$1,022.00

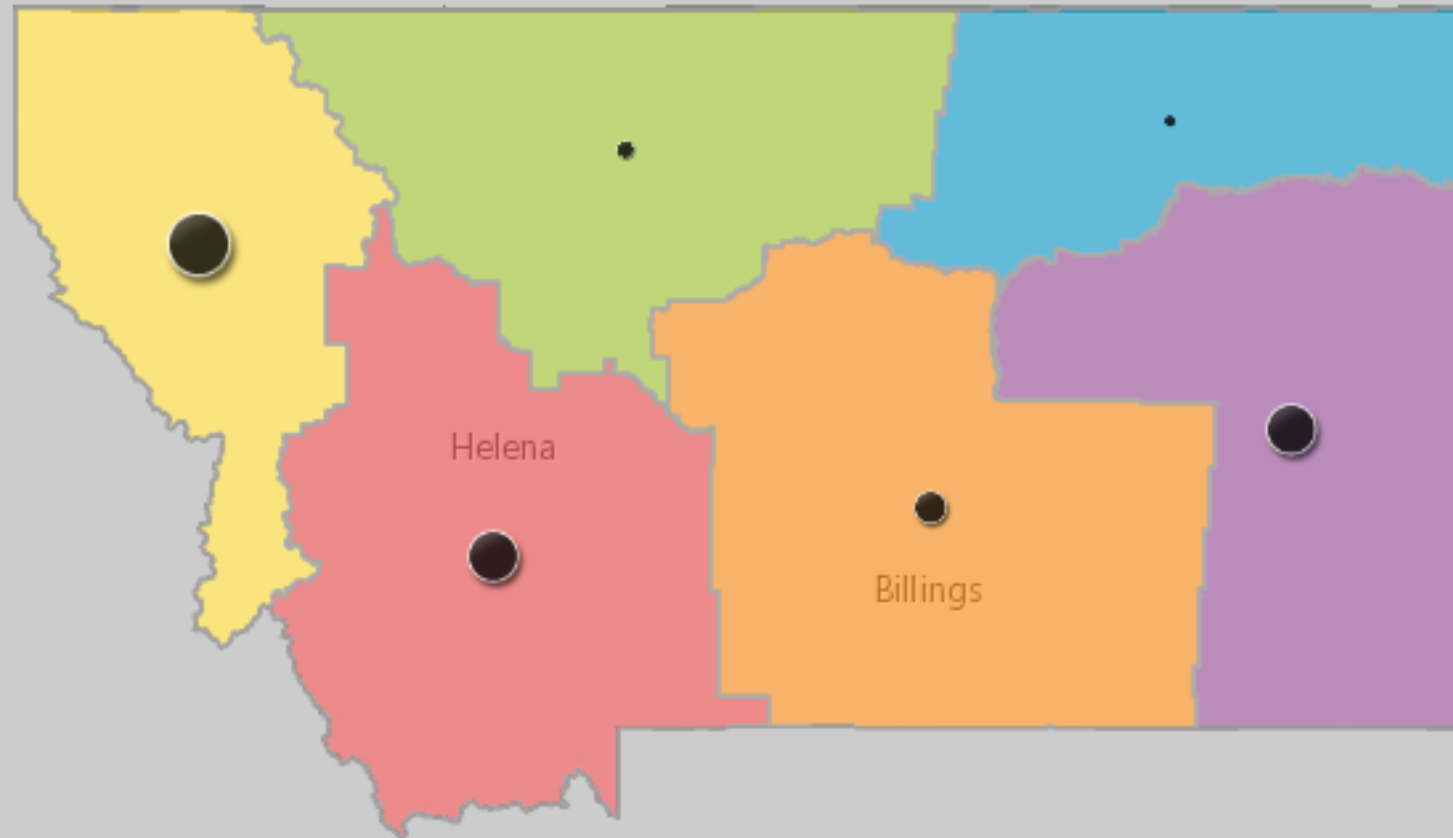


# Statewide Spending for MSL Projects/Services









# Federation spending on Montana Shared Catalog





 Click Here to Unlock Map



FederationMSLProjects by Federation

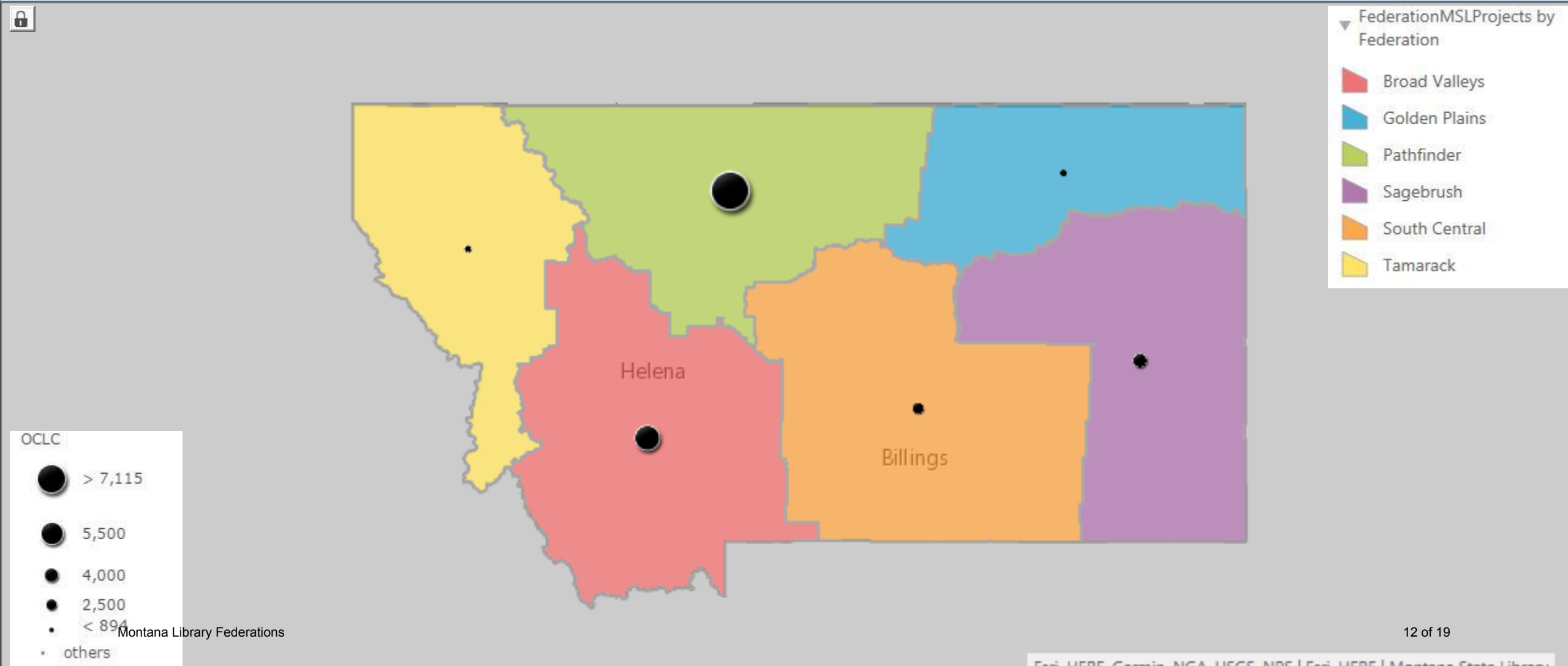
-  Broad Valleys
-  Golden Plains
-  Pathfinder
-  Sagebrush
-  South Central
-  Tamarack

Montana Shared Catalog

-  > 7,759
-  6,000
-  4,000
-  2,000
-  < 0
- Montana Library Federations
- others

# Federation spending on OCLC

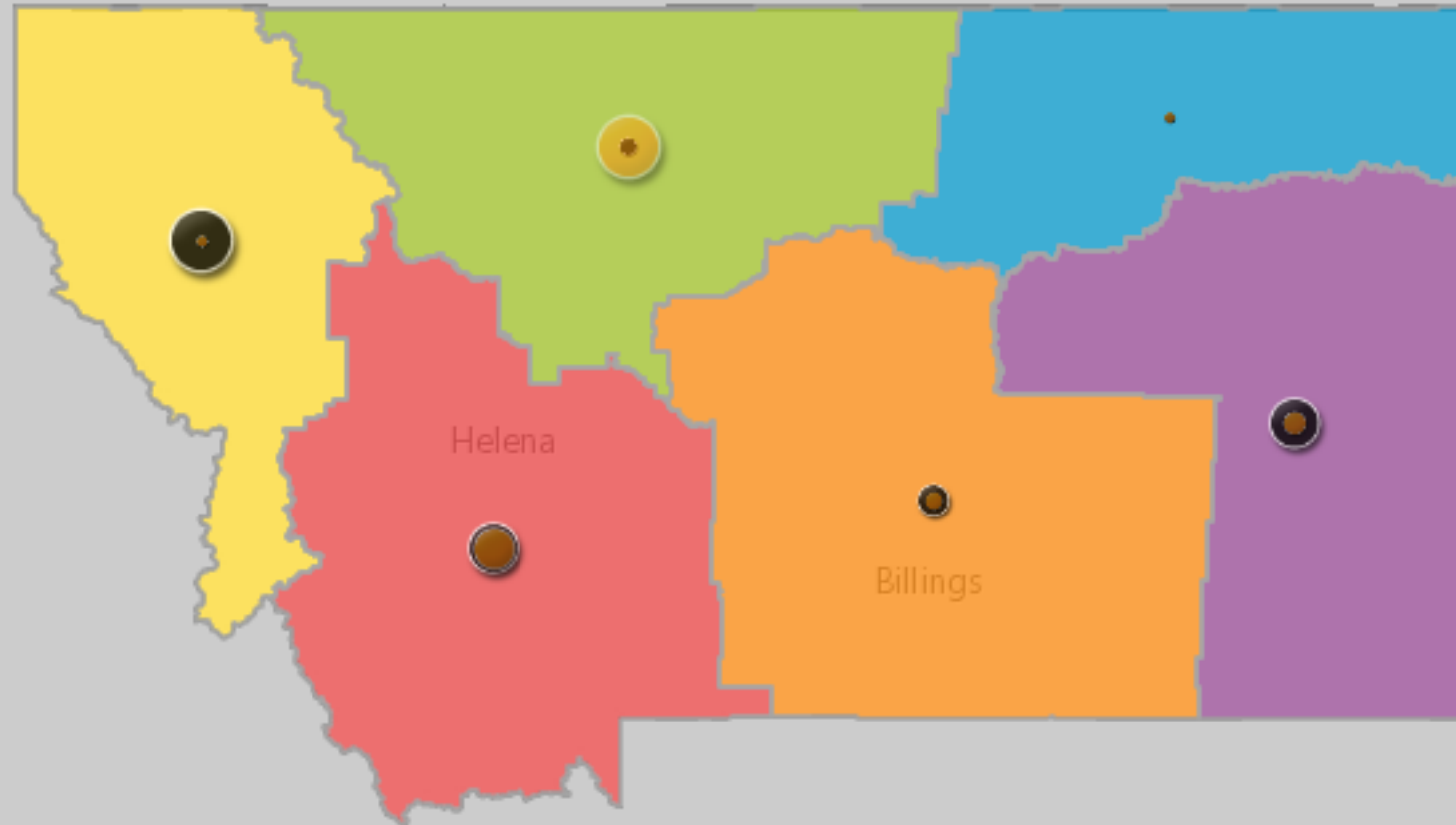
[Click Here to Unlock Map](#)



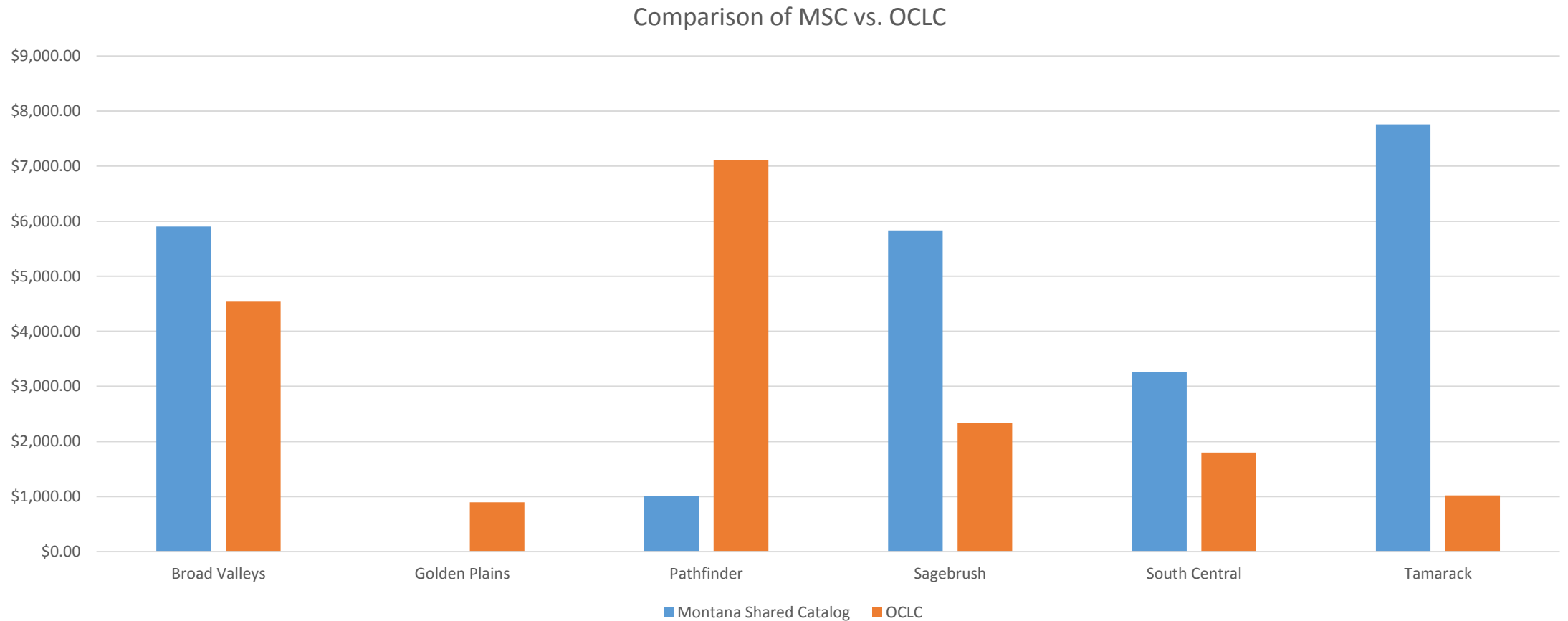
# Comparison of OCLC versus Montana Shared Catalog




[Click Here to Unlock Map](#)

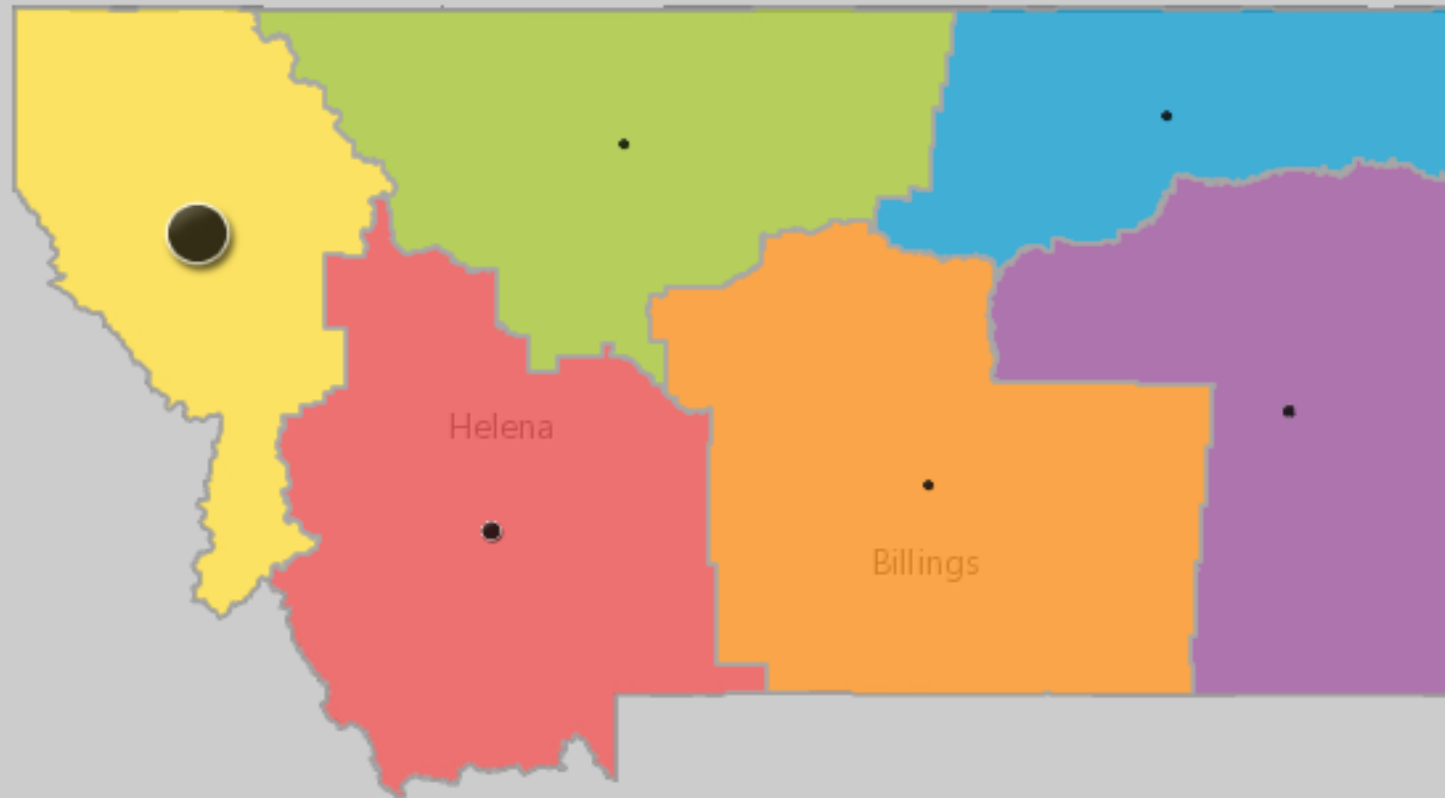








# Chart comparing OCLC vs. MSC








# Federation spending on courier

 Click Here to Unlock Map



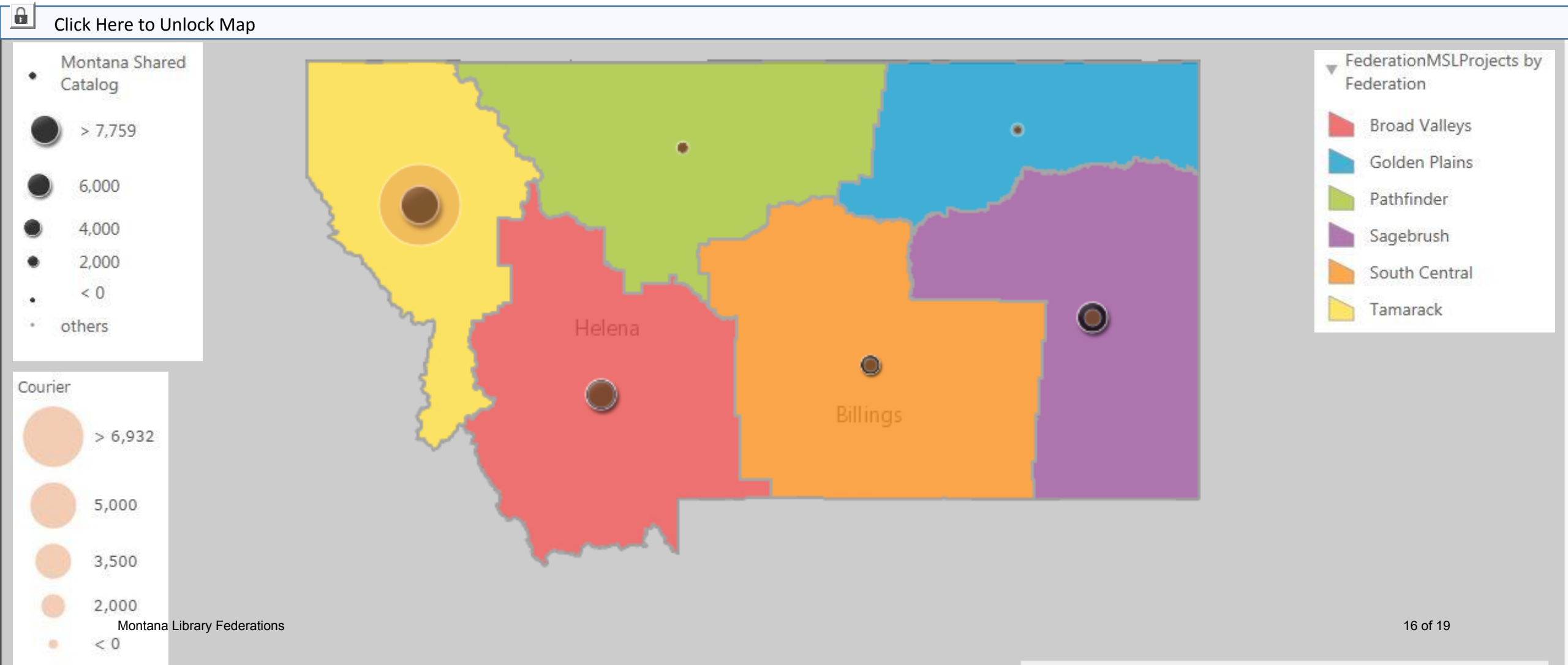
- FederationMSLProjects by Federation
-  Broad Valleys
  -  Golden Plains
  -  Pathfinder
  -  Sagebrush
  -  South Central
  -  Tamarack

Courier

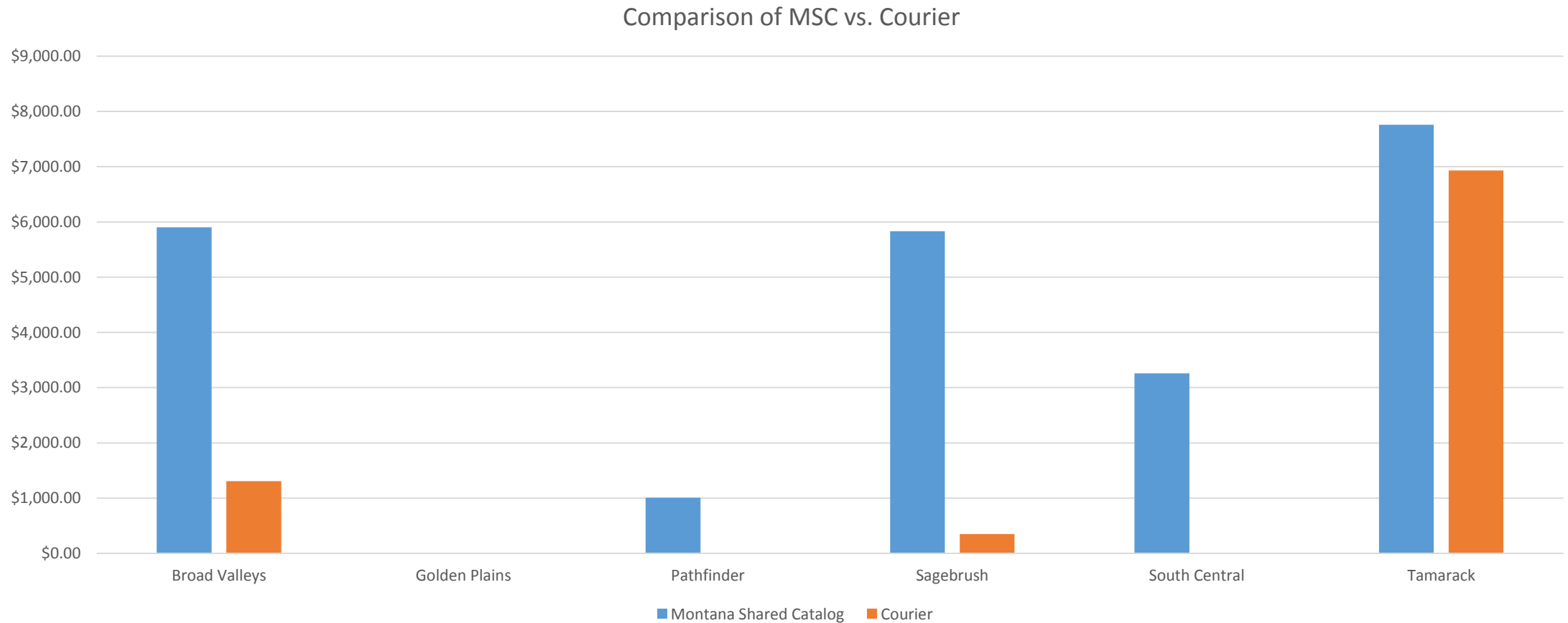
-  > 6,932
-  5,000
-  3,500
-  2,000
-  < 0
-  others

Montana Library Federations

# Comparison of courier versus Montana Shared Catalog




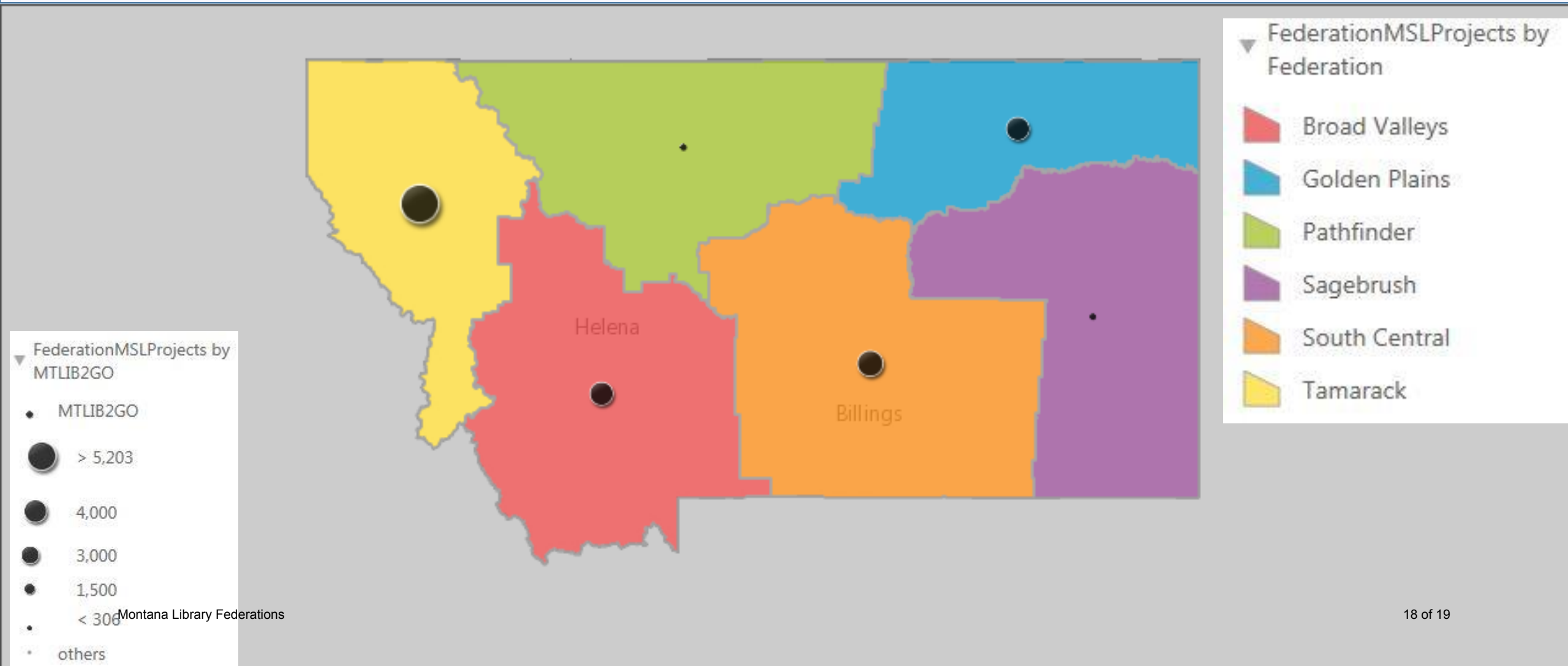
# Chart comparing MSC vs. courier





# Federation spending on MTLIB2GO

 Click Here to Unlock Map



Questions?

# Memo

**To:** Montana State Library Commission

**From:** Tracy Cook, Statewide Library Resources Director  
Jessie Goodwin, Montana Shared Catalog (MSC) Director

**Date:** February 24, 2017

**Re: MSC New Libraries**

Montana State Library staff and MSC Executive Board Members (Bobbi deMontigny, Jessie Goodwin, Amy Marchwick, Mike Price, Roberta Gebhardt, Mark Wetherington) recommend that the Commission accept the applications of the following libraries for membership in the MSC.

- Livingston School District – four locations; not currently automated, no data migration. The district’s high school library (Park High School) is already an MSC member. Joining the MSC would allow all Livingston School District libraries to utilize the same integrated library system (ILS) and opens up the potential for expanded resource sharing in Livingston as the Livingston-Park County Public Library is already an MSC member.
- Big Sandy Public Schools – two locations; not currently automated, no data migration. The addition of the public schools to the MSC opens up the potential for expanded resource sharing in the Big Sandy community as the Big Sandy Public Library is already an MSC member.
- Ida Dockery Owen Library (Yellowstone Christian College) – one location; outdated ILS, no data migration. This library houses a unique collection and is located near several current MSC member libraries. Other college libraries who maintain MSC membership include Aaniiih Nakoda College Library, Fort Peck Tribal Library, Flathead Valley Community College Library, Montana Bible College Library, and Stone Child College Library.

Applicants requested a total of \$6,810 in Fiscal Year 2017 (FY17) LSTA monies to cover their startup costs. Staff and the Network Advisory Council will consider this request when they prepare the Library Development budget recommendation later this spring. The Commission will consider this budget in June. The MSC Director notified applicants of the delayed funding timeline and the possibility that funds may not be budgeted for new MSC libraries due to the current known reduction in our FY17 LSTA award.

Big Sandy Public Schools and Ida Dockery Owen Library intend to become MSC members even if start-up funds do not become available. Livingston School District wishes to continue with the application process at this time, but has not yet confirmed their intent to join the MSC if funding is not awarded.



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PO Box 201800 1515 East 6<sup>th</sup> Avenue Helena, MT 59620 (406) 444-3115

February 21, 2017

I am writing to you as Chair of the Montana State Library Commission, and as a member of the Commission's new Funding Task Force. I am writing to you about money, or rather, Montana libraries' lack of it.

You count on the State Library to supply your library and your users with a variety of information resources and services, for example:

- The Montana Shared Catalog
- Montana's group OCLC contract
- Montana Library2Go
- Courier Alliance
- Montana Memory Project
- Lifelong learning programming such as the Ready2Read project
- Natural Resource Information System
- Digitized state government publications
- Montana geographic information

Together these information resources and library services form a useful information infrastructure, one that economically offers valuable content and library services to Montanans and Montana libraries.

These information resources and these services are, to varying degrees, expensive. Worth it, but expensive. We have paid for them using a mixture of state general funds, Coal Severance Tax revenues, federal Library Services and Technology Act funds, and of course, funds from your library's (and many other libraries') budgets. Routine cost increases often threatened our ability to pay for these services. While costs increase, many of our state or federal revenue sources fluctuate or are in decline. As is, perhaps, your library's local funding. Finally, some Montana libraries would like to offer their users these shared content and services, but cannot afford to do so. We think all Montanans deserve great library service.

We continue to believe there is great value in pursuing statewide funding for statewide information resources and infrastructure. In fact, we strongly suspect we could do more together to ensure Montana libraries have the information resources and the services our users need. The problem is, how do we pay for it?

'Paying for it' is what our task force is studying, initially focusing on two questions:

1. What do these shared library services currently cost Montana libraries? How much money do we have to raise? And,
2. What opportunities exist to acquire increased funding and more stable revenue sources (now and in the future)?

We're looking for sufficient funding, from stable revenue sources, to fund Montana's statewide information infrastructure and to support Montana libraries' missions. We think this will free up local funds to address local needs, and make it possible for our smallest libraries to provide their users with the mix of statewide information resources and library services enjoyed by many other Montana libraries.

We're interested in discussing any strategy that shows promise, and we look forward to hearing your ideas. Initially, we've begun the process by considering the possibility of a statewide foundation whose sole purpose would be to support this shared information infrastructure. We are not looking to compete with your library's local foundation's fundraising efforts. Instead, with your guidance and cooperation, we are looking for ways to assist your foundation's and your library's efforts by, in essence, adding an additional revenue stream to your library's budget — a revenue stream supporting those statewide information resources and services that your library has chosen to incorporate into its plan of service.

We plan to begin this discussion at the 'Conversation with the Commission' session on March 30, at the Montana Library Association's annual meeting in Billings. We will also discuss statewide funding strategies during the six spring Federation meetings<sup>1</sup> held throughout Montana.

We'd like to talk with your library's foundation. We'll be in touch, but please contact us if you have initial questions, or you have a time you'd like to meet. Jennie Stapp, Montana's State Librarian<sup>2</sup>, is our contact person.

Thanks, I look forward to speaking with you soon.

A handwritten signature in black ink that reads "Bruce Newell". The signature is written in a cursive, flowing style.

Bruce Newell  
Chair, Montana State Library Commission

cc. Jennie Stapp, State Librarian

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1

[http://docs.msl.mt.gov/Central\\_Services/Commission\\_Councils/Commission/Archive/2017/02/20/170208workplan\\_calendar.pdf](http://docs.msl.mt.gov/Central_Services/Commission_Councils/Commission/Archive/2017/02/20/170208workplan_calendar.pdf)

<sup>2</sup> Phone (406) 444-3116, Email [jstapp2@mt.gov](mailto:jstapp2@mt.gov)

## Montana State Library Commission Work Plan January – June 2018

Green (no font distinction) – activity progressing as expected.

Yellow (*italicized*) – activity may be delayed but the delays do not necessarily rise to the level of Commission concern

Red (**bolded**) – activity is delayed and Commission attention is warranted

Blue (underlined) – addition or change to the original work plan.

### Strategic Framework – Secure Sufficient and Sustainable Funding

#### Activities:

- The State Library adopts a planning and reporting system for State Library Administration

Inputs	Outputs	Outcomes	Impacts
Time of the reporting task force and additional staff as necessary	A reporting system that serves as a dashboard for project administration, resource allocation and administration, and reporting	Management and staff report having ready access to tools to more effectively administer the programs and projects of the State Library	The programs of the State Library achieve the impacts articulated in the Strategic Framework.
Data maps and data <ul style="list-style-type: none"> <li>• Staff have completed an initial inventory of reports and a matrix of data reported in each</li> </ul>		The Commission reports that they can readily determine how the resources they allocate are utilized and whether or not the State Library is meeting our goals.	
Reporting system (TBD)		Management and the Commission have information that helps them prioritize new and/or declining	

		resources to successfully address opportunities and challenges.	
		Management, staff, and the Commission utilize information from the reports to make decisions about resource, projects, and programs.	

- The State Library Commission creates a report on alternative sources of funding to secure sufficient and sustainable funding for the State Library and our partners.

Inputs	Outputs	Outcomes	Impacts
Time of the funding task force and additional staff as necessary	A report that documents total costs necessary for the State Library to create a useful information infrastructure and to foster partnerships.	The Commission, staff, and partners use the reports to strategically seek and align financial resources to meet State Library goals.	The programs of the State Library achieve the impacts articulated in the Strategic Framework.
Data regarding the costs of programs and services.	A report that documents funding opportunities to funding the costs. <ul style="list-style-type: none"> <li>• Staff have begun to brainstorm costs to include in our initial analysis.</li> </ul>	The Commission identifies new partners and opportunities that grow into funding opportunities.	
Data regarding alternative sources of funding or funding opportunities.	Communication to stakeholders about funding efforts. <ul style="list-style-type: none"> <li>• Chair Newell sent a letter regarding the task force to Library Directors.</li> </ul>	The State Library has sufficient and sustainable funding to achieve its goals.	



	Discussions about the task force plans are occurring at Federation meetings and at MLA.		
		State Library partners identify and/or benefit from new funding possibilities.	
		State Library partners have sufficient and sustainable funding to achieve their goals and to make use of the resources the State Library provides.	



JULY		AUGUST		SEPTEMBER		NOTES
1		1		1		
2		2		2		<b>Regular August meeting agenda items:</b>
3		3		3		Glacier County Library, Cut Bank
4		4		4		FY '16 4 <sup>th</sup> quarter financial report;
5		5		5		FY '17 opening budget;
6		6		6		Discuss programs & Commission work plans
7		7		7		
8		8		8	<b>MLIAC Meeting &amp; ELG Interim Committee</b>	<b>Golden Plains Federation Meeting</b>
9		9	<b>Work Session &amp; Reception, Browning</b>	9	September 8 & 9, 2016	Glasgow City-County Library, Glasgow
10		10	<b>Commission Meeting, Glacier County Library, Cut Bank</b>	10		<b>Commissioner: C. Eissing</b>
11		11		11		Staff: Cook
12		12		12		
13		13		13	<b>Fall Workshops</b>	<b>South Central Federation Meeting</b>
14		14		14	<b>Polson, MT</b>	Harlowton Public Library, Harlowton
15		15		15		<b>Commissioner: N/A</b>
16		16		16		Staff: Cook, Stapp
17		17		17	<b>South Central Federation Meeting</b>	
18		18		18		<b>Broad Valleys Federation Meeting</b>
19		19		19		Conference Call
20		20		20		<b>Commissioner: A. Kish</b>
21		21		21		Staff: Cook
22		22		22		
23		23		23		
24		24		24		
25		25		25		<b>RIPL Conference</b>
26		26		26		Denver, Colorado
27		27		27	<b>Broad Valleys Federation Meeting</b>	<b>Commissioner: Newell</b>
28		28		28		Staff: Orban, Cook
29		29		29	<b>Golden Plains Federation Meeting</b>	Online information: <a href="http://ripl.lrs.org/">http://ripl.lrs.org/</a>
30		30		30	<b>Research Institute for Public Libraries</b>	
31		31		31		



OCTOBER		NOVEMBER		DECEMBER		NOTES
1	Research Institute for Public	1		1		<p><b>Regular October meeting agenda items:</b></p> <p>FY '17 1<sup>st</sup> quarter financial report;</p> <p>FY '16 Federation Reports</p> <p><b>TBL Volunteer Luncheon, Helena</b></p> <p><b>All Commissioners invited</b></p> <p><b>Tamarack Federation Meeting</b></p> <p>Conference Call</p> <p><b>Commissioner: Wall</b></p> <p>Staff: Cook, Stapp</p> <p><b>NSGIC Annual Meeting</b></p> <p>Indianapolis, IN</p> <p><b>Commissioner: Wall</b></p> <p>Staff: Hammer, Fashoway</p> <p><b>Pathfinder Federation Meeting</b></p> <p>Chouteau County Public Library, Ft. Benton</p> <p><b>Commissioner: A. LaFromboise</b></p> <p>Staff: Cook</p> <p><b>Sagebrush Federation Meeting</b></p> <p>Miles City Public Library, Miles City</p> <p><b>Commissioner: Newell</b></p> <p>Staff: Cook, Stapp</p> <p><b>Regular December meeting agenda items:</b></p> <p>FY '17 Land Plan approval</p> <p>Network Advisory Council Report</p> <p>2017 Commission meeting dates selection</p>
2	Libraries	2		2		
3		3		3		
4		4		4		
5		5	Sagebrush Federation Meeting	5		
6		6		6		
7		7		7		
8		8		8		
9		9		9		
10		10	Network Advisory Council Meeting	10		
11		11		11		
12	Commission Meeting	12		12		
13	TBL Volunteer Luncheon	13		13		
14		14		14	Commission Meeting	
15		15		15		
16		16		16		
17		17		17		
18		18	MLIAC Meeting	18		
19	Tamarack Federation Meeting	19		19		
20		20		20		
21		21		21		
22		22		22		
23		23		23		
24	National States Geographic	24		24		
25	Information Council Meeting	25		25		
26	October 24-28, 2016	26		26		
27	Pathfinder Federation Meeting	27		27		
28		28		28		
29		29		29		
30		30		30		
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JANUARY		FEBRUARY		MARCH		NOTES
1		1		1		<b>Library Legislative Day</b>
2	<b>2017 Legislative Session – Day 1</b>	2		2		Montana State Library, Helena, MT;
3		3		3		5:30 to 8:30 p.m.
4		4		4	<b>Sagebrush Federation Meeting</b>	<b>All Commissioners invited to attend</b>
5		5		5		
6		6		6		<b>Regular February meeting agenda items:</b>
7		7		7		FY '17 2 <sup>nd</sup> quarter financial report;
8		8	<b>Commission Meeting</b>	8		Conversations w/ Commission planning
9		9		9		
10		10		10	<b>Broad Valleys Federation Retreat</b>	<b>NSGIC Midwinter Meeting</b>
11		11		11	March 10-11, 2017	Annapolis, MD
12		12		12		<b>Commissioner: Wall</b>
13		13		13		Staff: Hammer
14		14		14	<b>Network Advisory Council Meeting</b>	<b>Sagebrush Federation Meeting</b>
15		15		15		Miles City Public Library, Miles City
16		16		16		<b>Commissioner: Eissinger</b>
17		17		17		Staff: Cook
18	<b>Library Legislative Day</b>	18		18	<b>South Central Federation Meeting</b>	
19		19		19		<b>Broad Valleys Federation Meeting</b>
20		20		20		Finlen Hotel, Butte, MT
21		21		21		<b>Commissioner: Kish</b>
22		22		22		Staff: Stapp
23		23		23		
24		24		24		<b>South Central Federation Meeting</b>
25		25	<b>Tentative Legislative Transmittal</b>	25		Carnegie Library, Big Timber
26		26	February 25-28, 2017	26		<b>Commissioner: Arlitsch</b>
27		27	<b>National States Geographic</b>	27		Staff: Stapp
28		28	<b>Information Council Meeting</b>	28		
29			February 27-March 2, 2017	29	<b>Commission Meeting (Tentative)</b>	<b>Montana Library Assn. Conference</b>
30				30	<b>Montana Library Assn. Conference;</b>	Billings, MT;
31				31	<b>Conversations w/ the Commission</b>	Conversations w/ the Commission
					March 29-March 31, 2017	<b>All Commissioners invited to attend</b>



APRIL		MAY		JUNE		NOTES
1		1	<b>National Library Legislative Day</b>	1		<b>Regular April meeting agenda items:</b>
2		2	May 1-2, 2017	2		Legislative discussion
3		3		3		
4		4		4		<b>Golden Plains Federation Meeting TBD</b>
5		5		5		Roosevelt County Library, Wolf Point
6		6		6		<b>Commissioner: Arlitsch (Tentative)</b>
7		7	<b>MSL Workshops</b>	7		Staff: TBD
8		8	Red Lodge, MT	8		
9		9	<b>Network Advisory Council Meeting</b>	9		<b>National Library Legislative Day</b>
10		10		10		Washington, DC
11		11		11		<b>Commissioner: Newell, Arlitsch</b>
12		12	<b>Tamarack Federation Meeting</b>	12		Staff: Stapp
13		13	May 12-13, 2017	13		
14		14		14	<b>Commission Meeting (Tentative)</b>	<b>Pathfinder Federation Meeting (Tentative)</b>
15		15		15	<b>Western Council of State Libraries</b>	Chouteau County Public Library, Ft. Benton
16		16		16	Helena, MT June 15-16, 2017	<b>Commissioner: TBD</b>
17		17		17		Staff: Stapp
18		18		18		
19		19		19		<b>Tamarack Federation Meeting</b>
20	<b>MLIAC Meeting</b>	20	<b>Golden Plains Federation Meeting</b>	20		Marina Kay, Big Fork, MT
21	At Intermountain Conference	21		21		<b>Commissioner: Wall, LaFromboise</b>
22		22		22		Staff: Cook
23		23		23		
24		24		24		<b>Regular June meeting agenda items:</b>
25		25	<b>Pathfinder Federation Meeting</b>	25		FY '18 Federation Plans of Service
26	<b>MSL Workshops</b>	26		26		State Librarian evaluation
27	Havre, MT	27		27		Staff appreciation event
28		28		28		
29		29		29		
30		30		30		
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JULY		AUGUST		SEPTEMBER		NOTES
1		1	<b>Network Advisory Council Retreat</b>	1		<b>Regular August meeting agenda items:</b> TBD FY '17 4 <sup>th</sup> quarter financial report; FY '18 opening budget; Discuss programs & Commission work plans
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9		9	<b>Commission Meeting (Tentative)</b>	9		
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21		21		21		
22		22		22		
23		23		23		
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25		25		25		
26	<b>Summer Leadership Institute</b>	26		26		
27	East Glacier, MT	27		27		
28	July 26-29, 2017	28		28		
29		29		29		
30		30		30		
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OCTOBER		NOVEMBER		DECEMBER		NOTES
1		1		1		
2		2		2		<b>Regular October meeting agenda items:</b>
3		3		3		FY '18 1 <sup>st</sup> quarter financial report;
4		4		4		FY '17 Federation Reports
5		5		5		
6		6		6		<b>TBL Volunteer Luncheon, Helena</b>
7		7		7		<b>All Commissioners invited</b>
8		8		8		
9		9		9		<b>Fall Federation meeting dates TBD</b>
10		10		10		
11	<b>Commission Meeting (Tentative)</b>	11		11		<b>Regular December meeting agenda items:</b>
12	<b>TBL Volunteer Luncheon</b>	12		12		FY '18 Land Plan approval
13		13		13	<b>Commission Meeting (Tentative)</b>	Network Advisory Council Report
14		14	<b>Network Advisory Council Meeting</b>	14		2018 Commission meeting dates selection
15		15		15		
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JANUARY		FEBRUARY		MARCH		NOTES
1		1		1		<b>2018 Commission Meeting Dates TBD</b>
2		2		2		
3		3		3		<b>Regular February meeting agenda items:</b>
4		4		4		FY '18 2 <sup>nd</sup> quarter financial report;
5		5		5		Conversations w/ Commission planning
6		6		6		
7		7		7		<b>Spring Federation meeting dates TBD</b>
8		8		8		
9		9		9		<b>Montana Library Assn. Conference</b>
10		10		10		TBD
11		11		11		Conversations w/ the Commission
12		12		12		<b>All Commissioners invited to attend</b>
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APRIL		MAY		JUNE		NOTES
1		1		1		<p><b>Regular April meeting agenda items:</b></p> <p>LSTA award and budget;</p> <p>Network Advisory Council Report;</p> <p>FY '18 3rd quarter financial report;</p> <p>Legislative discussion</p> <p><b>National Library Legislative Day</b></p> <p>Washington, DC</p> <p><b>Commissioner:</b></p> <p>Staff: Stapp</p> <p><b>Regular June meeting agenda items:</b></p> <p>FY '19 Federation Plans of Service</p> <p>State Librarian evaluation</p> <p>Staff appreciation event</p>
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