

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.
 - Note: the MSC Director’s last day in office will be June 8, 2017. Staff will need to handle a higher volume of help desk tickets in order to maintain the Montana Shared Catalog. As a result, MSC projects will be delayed for the foreseeable future.

| Inputs | Outputs | Outcomes | Impacts |
|---|--|--|---|
| <i>Time of Bobbi deMontigny and Amy Marchwick</i> | <i>Informational Packet or website section that contains info for all MSC directors</i> | <i>Better understanding among new and joining directors</i> | <i>Ultimate impact - a more robust service for those who want it.</i> |
| <i>MSC Knowledge</i> | <i>Directors (New to MSC or interested) receive an introductory document to help them understand what the MSC is and what to expect when transitioning</i> | <i>Easier transition into MSC Membership for New members</i> | <i>MSC Staff are more effective and efficient in their work</i> |

| | | | |
|--|--|--|--|
| | <i>from their current ILS to the MSC</i> | | |
| <i>Data gathered from MSC ticket system</i> | | <i>MSC staff spend less time on basic review</i> | <i>Library directors are better served and more well-informed about their responsibilities and options</i> |
| <i>Videos & Training materials already created (will be linked in)</i> | | <i>MSC staff have more time to develop standards, training, and new services</i> | <i>Library directors can make an informed decision when seeking membership in the MSC</i> |
| | | | <i>Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)</i> |
| | | | <i>Collaboration that is respectful and polite (LDSTF)</i> |

- Analyze the Montana Shared Catalog’s Partners’ sharing group in order to better understand the impacts of fulfillment expansion.
 - Note: the MSC Director’s last day in office will be June 8, 2017. Staff will need to handle a higher volume of help desk tickets in order to maintain the Montana Shared Catalog. As a result, MSC projects will be delayed for the foreseeable future.

| Inputs | Outputs | Outcomes | Impacts |
|--|--|---|--|
| <i>Jessie Goodwin – research and presentation time</i> | <i>Report on fulfillment expansion</i> | <i>Increased knowledge of potential regarding fulfillment expansion</i> | <i>MSL staff will know with certainty whether sharing group expansion is viable</i> |
| | <i>Report is presented to membership and executive board</i> | <i>Members increase knowledge of challenges and opportunities regarding sharing group expansion</i> | <i>MSC member libraries will be more informed regarding sharing group membership</i> |

| | | | |
|--|--|--|---|
| | | | <i>Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)</i> |
| | | | <i>Library infrastructure that encourages consortial resource sharing to make information resources, technology and service delivery more efficient, effective, affordable, customizable, sustainable, scalable (LDSTF)</i> |

- Development of a series of short tutorials for new public library directors.
 - Note: ASPeN, the new version of the library directory, will be going live in the fall. This is impacting the new director tutorials project since many of the tutorials will need to use the ASPeN interface.

| Inputs | Outputs | Outcomes | Impacts |
|---|--|--|--|
| <i>Jo Flick and Pam Henley – time writing scripts and producing tutorials</i> | <i>10-15 tutorial segments - OUTLINED</i> | <i>New Directors complete series so they understand critical need-to-know MT-specific information within the first few weeks on the job</i> | <i>Communities will have excellent library service with no disruption during leadership transition</i> |
| <i>Adobe license</i> | <i>Data: # of new directors completing series, # of times each segment is accessed, # of initial consultant visits where time is spent on other issues</i> | <i>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</i> | <i>Library directors become engaged and active in MT library community, leading to thriving libraries in local communities</i> |
| <i>Server space to host</i> | <i>No solution determined yet</i> | <i>New Directors will know where to reference MT-specific information to avoid confusion and missed opportunities</i> | <i>Library directors who manage library resources efficiently (lean management) (LDSTF)</i> |

- 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 possible presenter for first program (fall 2017). | Citizens learn from exchanging different points of views | Libraries are leaders in creating thriving communities (LDSTF) |
| 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 | <u>Data gathering, stakeholder and partner identification/analysis, outcomes desired are in progress</u> | 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 Cathy Brandvold – July 22 Jamie Grecko - ? Michelle Fenger - ? | 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 Marias Fair – Shelby July 20-23 | 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 Marias Fair booth = \$100.00 | 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) |
| | <u>All 6 federations have created a theory of change for their various programs. The outcomes identified will be used by the coordinators to develop a new model for the plan of service and annual report.</u> | <u>Federation member libraries can report the outcomes that federation funding achieves.</u> | |

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 | Library directors and board members learn about different economic models. | |

| | | | |
|--|--|--|--|
| | economic/governance models for public libraries. | | |
| | 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 |
|--|---|--|---|
| 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 |
| Tracy Cook attended a training session about “Making the Case”. She will use that information to develop resources/training for libraries. | 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 |
|------------------------|---|--|---|
| 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) |

- 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 | 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 |

| | | | |
|---|--|---|--|
| maintaining/building current non-centralized acquisitions | | | |
| 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 | | |
| Tracy Cook attended a meeting with the Procurement Office to determine what is required for a contract with multiple vendors. | Tracy Cook and Jemma Hazen outlined a plan for implementing the project. Libraries have been invited to participate. | | |

- Provide leadership training for libraries –Summer Library Leadership Institute

| <u>Inputs</u> | <u>Outputs</u> | <u>Outcomes</u> | <u>Impacts</u> |
|--|--|--|---|
| <u>facilitator team (honorarium & travel stipend)</u> | <u>6-10 online meetings with facilitators , 1 face2face meeting in Billings; facilitators present most of activities at the retreat, assist MSL staff with follow-up, & as mentors for SLLI participants</u> | <u>Participants RECOGNIZE THEIR OWN LEADERSHIP STYLE as well as the benefits & challenges of their style, so that they can participate more productively in management teams & to effect positive change in their library & community.</u> | <u>Positive change at the participant's library contributing to a thriving community .</u> |
| <u>pre-conference assignments: focused on the basic philosophy of leadership & the difference between leading & managing</u> | <u>Participants spend 10-20 hours with assigned reading, viewing, & reflection based on assignments planned by the facilitator team.</u> | <u>Participants DEVELOP LISTENING & COMMUNICATION SKILLS so that they are able to INSPIRE OTHERS & collaborate toward a shared vision.</u> | <u>The library's shared vision is realized & the library is able to fulfill its mission.</u> |
| <u>Retreat July 26-29</u> | <u>camp-like atmosphere at a secluded & private location, 4 days of activities, presentations, discussions</u> | <u>Participants will be CONFIDENT TO TAKE RISKS & to create an environment that is resilient in failure so that libraries & librarians are positive innovators in their communities.</u> | <u>Library programs & partnerships are productive & contribute to a thriving community.</u> |
| <u>journals & other materials & supplies</u> | <u>Participants reflect on their learning & use their reflections to make mid-course corrections & plan future actions. The journal provides a long-term resource to the learner & a way for them to chart their progress.</u> | <u>Participant PROPOSE & DEVELOP A COMPLEX & CHALLENGING PROJECT using productive strategies for managing change.</u> | <u>The library takes on the worst community problems with successful library programs</u> |

| | | | |
|---|---|---|--|
| <u>follow-up webinars & face2face meetings</u> | <u>MSL staff & facilitators, as well as peers, provide continued support, as participants transfer their new knowledge to a real-life project at their library.</u> | <u>Participants PURSUE THEIR OWN LEADERSHIP DEVELOPMENT to try new things, grow, to evaluate their efforts, to view hardship, failure, or fear as catalyst for positive change in their own lives, their libraries & communities.</u> | <u>Participants are more confident, able to persevere, have increased status in their communities, state & nation, & other people rally around them.</u> |
| <u>report to the MT State Library Commission - MLA 2018</u> | <u>Participants plan & deliver their reports in a format they design. Some attend the meeting to answer questions & present their work.</u> | | |

- Migrate Montana Shared Catalog from current in-house servers to SirsiDynix' Service as a Software (SaaS)

| <u>Inputs</u> | <u>Outputs</u> | <u>Outcomes</u> | <u>Impacts</u> |
|---|--|---|---|
| <u>Time of MSC admin staff and Mike Price</u> | <u>SaaS transition plan completed</u> | <u>Specific guidelines, action items, and steps for the transition from hardware to SaaS are known by MSC and MSL staff</u> | <u>Minimal disruption to MSC patrons occurs</u> |
| <u>Time of MSC member library staff</u> | <u>Libraries can connect to the SaaS server after migration</u> | <u>Libraries are able to transition seamlessly to the new hosted server</u> | <u>Libraries are able to conduct business as usual following the planned migration down time.</u> |
| <u>MSC admin knowledge</u> | <u>List of things to address during the migration</u> | <u>Improved communication with SirsiDynix Project Management team</u> | |
| | <u>Transition is well thought out and all aspects of the migration are considered in advance</u> | <u>MSC staff are comfortable going forward with migration, and unknowns are kept to a minimum</u> | |

| | | | |
|--|--|---|--|
| | <u>“Bridge” mode time will remain within SirsiDynix Project Manager’s estimates.</u> | <u>MSC staff are able to provide support and assistance after the SaaS migration.</u> | |
| | | | |