

Memo

To: Montana State Library Commission

From: Jennie Stapp, State Librarian and staff

Date: April 6, 2022

Re: Proposal to Restructure Talking Book Services

The Montana State Library is seeking to restructure the Montana Talking Book program to leverage contracted services available through the Utah State Library (USL). This proposal is intended to enhance the current services provided to Montana Talking Book patrons by providing more robust and resilient services from USL, a State Library that has offered Talking Book services for more than 50 years. In addition to Utah services, USL provides contract services for both Wyoming and Alaska.

In the current program structure and staffing model, Montana is only able to serve a small percentage of eligible individuals and lacks the ability to grow our patron base. This proposal frees up in-state resources that MSL intends to reinvest in Talking Book services to enhance program outreach needs while maintaining or improving upon the current patron experience.

Montana already contracts with Utah to provide Braille services and has done so for more than ten years. The additional services MSL seeks to contract with USL include:

- the circulation of book cartridges and book cartridge players,
- Reader's Advisor services,
- Braille and Audio Reading Download (BARD) account administration and maintenance,
- statistical reporting, newsletter mailings, and some book recording services.

The current Reader's Advisors and Circulation Clerk functions would be performed by USL staff, and MSL would create two new positions to support and promote Talking Book services by reaching out to individuals, organizations, and businesses that support

and serve blind and low vision individuals and other underserved populations, creating awareness of the program.

The rationale behind this decision:

1. To grow the number of Talking Book patrons and to spread awareness of Talking Book services.
 - a. There are less than 2,000 current Talking Book patrons and estimates of 21,800 people reported to have a visual disability in Montana. This means that MSL is serving less than 10% of visually disabled Montanans. Additionally, we estimate the total number of people eligible for Talking Book services closer to 50,000 when other conditions that impact a person's ability to read are considered, bringing that percentage below 5%.
 - b. In 2019 Congress passed the Marrakesh Treaty that provides for the open exchange of accessible-format books across international borders
 - c. In February 2021 the National Library Service (NLS) implemented changes that made it easier for people with reading disabilities to enroll in Talking Book services, thus increasing the eligible population further.
 - d. The NLS issued a FY22 objective to increase the number of active patrons in the program by 2.5%. By focusing MSL's resources on outreach and raising awareness, MSL can do its part to fulfill NLS's objectives.
 - e. MSL will prioritize outreach and leverage a new staffing model that positions MSL to greatly increase the number of people who are aware of and use Talking Book services in the state of Montana. Staff will concentrate on building relationships with organizations throughout the state that interact with the target demographic, such as Public Libraries, Optometrist offices, Blind and Low Vision services, and schools.

2. Service Improvements
 - a. Partnership with USL will provide patrons with access to additional titles not currently available to Montana Talking Book patrons
 - b. Partnership with USL will increase the total numbers of copies of titles available thereby making it easier for Montana patrons to get access to specific titles at any given time.
 - c. USL has transitioned to a Duplication on Demand (DoD) based circulation model which will provide additional benefits to Montana Patrons not currently available through the Montana circulation model.
 - d. MSL typically records 30 titles of Montana specific content each year through our recording program. This will continue following restructuring, but patrons will also benefit from USL's ability to record over 200 titles per year. Additionally, USL will take over recording of some Montana serials and manuals, freeing up the MSL recording program to record more Montana literature. These items will be uploaded to BARD to not only be enjoyed throughout the United States, but internationally thanks to the passage of the Marrakesh Treaty in 2019.

- e. Staff has identified MSL's recording program as both a key area to improve services and expand our outreach efforts. By relying on USL to record some of Montana's items, staff would be able to work on expanding the program through partnerships with organizations throughout the state such as theaters and colleges, as well as Indigenous organizations.
 - f. MSL has contracted with the National Federation of the Blind to expand access to Newsline, a recorded newspaper program. Additional outreach will help grow the number of Newsline subscribers.
 - g. Alaska has conducted a biennial customer satisfaction survey for years. Since contracting with USL in 2015, customer satisfaction in Alaska has remained in the mid-90% as positive.
 - h. Wyoming has contracted with USL for decades and report that they love the service. They report that USL is very easy to work with and Talking Book patrons get the same level of service as if they called Cheyenne. Wyoming reports never having heard a patron complaint.
3. Service Resilience
- a. MSL currently has a single circulation position that is heavily supported by volunteers. Volunteer hours equal one FTE just in circulation.
 - b. During COVID, volunteers were not available to assist with circulation needs and MSL supplemented with temporary staff to assist the circulation position.
 - c. Contracting for circulation services through Utah provides a greater level of security and stability in the event of future situations that limit MSL staff access to state facilities.
4. By focusing on outreach, MSL will make progress towards their Library Services and Technology Act 5-year plan.
- a. Goal 2 states: Outreach/Lifelong Learning -The Montana library community, through its interconnectedness, helps community members understand that libraries are for their lives right now as well as for their lifetimes.
 - b. In the LSTA Grants to States Program Implementation Evaluation, Quality Metrics identified a growing population of eligible Talking Book patrons as an opportunity for MSL to find a way to reach this population as a priority recommendation for MSL's next 5-year plan.
5. Cost savings for Montana State Library
- a. The current cost of Talking Book services is approximately \$387,000. By contracting with USL to provide the same level of services the cost would be approximately \$185,000 with a cost savings of approximately \$202,000. MSL will invest the cost savings in the program to grow the program.

- b. Because MSL would no longer need to maintain a collection and equipment, there will also be a significant cost savings for rent by contracting with USL. Rent savings is not included in the information below because this is a savings to the State of Montana and the funding may not be included in future MSL budgets.

Budget implications

FY 23 Talking Book Budget		
	Current	Proposed
Personal Services	\$ 357,000	\$ 224,000
Operating Expenses	\$ 30,000	\$ 10,000
Contract		\$ 140,000
	\$ 387,000	\$ 374,000

*Rent excluded

Next steps and timeline

- April 8, 2022 Proposal shared with Commission Finance Committee
- April 13, 2022 Approval requested from the State Library Commission

Pending Commission approval

- April 14, 2022 NLS is notified
- April 14, 2022 Contract negotiation initiated with USL
- April 14, 2022 Keystone contract modifications initiated
- April 18, 2022 Patrons notified of pending changes
- June 1, 2022 Contract finalized no later than this date
- June 1, 2022 Patron information extracted from the talking book library system and transferred to USL
- June 1, 2022 No later than this date, MSL will surplus players, cartridges, and other equipment. Items will be returned to NLS or USL at the direction of NLS
- July 1, 2022 USL Contract start date
- Outreach staffing recruitment will commence as FTE and funding allows.

Measures of success

Talking Book services is a flagship program of MSL and is highly valued by patrons. The program is successful as currently structured, but staff have identified opportunities to improve and grow the program as stated above. To continue to ensure a very high level of service and to ensure that Talking Book services continue to be a valued resource for patrons, MSL would evaluate the implementation of this proposal based on metrics to include:

- The successful implementation of an outreach staffing model
- The creation of an outreach plan to target effective outreach to key stakeholders

- The number of outreach, educational, and engagement opportunities supported by TB staff
- The number of new patrons
- Patron assistance and readers advisory statistics
- Patron circulation rates
- Patron reported satisfaction
- The number of new talking book recordings relative to current recording capacity
- Circulation delivery time relative to current delivery time