

## Notes from review of MSL files at the Montana Historical Society

- MSL has been working with federations since 1950s. Their boundaries and membership morphed and changed until 1976 when the last federation was formed. Membership continued to change over time, but the boundaries were set.
- 1952 – Raymond E. Mahoney, *Library Journal*, article states “federations balance local control with larger systems which provide efficiency and more services. Local libraries contract with larger, headquarters library for certain services.”
- 1956 – Library Services Act (precursor to LSCA and LSTA) was the impetus for cooperative library systems. Federal funds on a matching basis were made available. The vision was to have groups of libraries working together regionally with a strong central library to serve as the headquarters.
- 1956 – 1<sup>st</sup> federation to organize is the Northwest Federation of Libraries. Inez Herrig, director of the Lincoln County Library in Libby is the first coordinator. Participating libraries include Lincoln County, the Carnegie City and Flathead County libraries in Kalispell, and the Whitefish Library.
- 1957? - 2<sup>nd</sup> federation Five Valleys Federation includes Missoula, Mineral, Ravalli, Sanders, Lake, Granite, and Powell. Missoula Public is the headquarters. Evelyn Swant is the coordinator. After the demonstration period (roughly 2 years), this federation ceased to offer services.
- 1958 – Great Falls federation is created locally and uses only local funds. GFPL is the headquarters. Alma Jacobs is the coordinator. It includes Cascade County and Pondera County.
- 1959 – Sagebrush Federation is created with Miles City Public Library as the headquarters. Claire Smith is the coordinator. It includes Carter, Custer, Fallon, Garfield, and Powder River.
- 1965 – Big Sky Federation is formed with Roger Spillers as the coordinator. The Helena Public Library is the headquarters. It includes Beaverhead, Broadwater, Jefferson, and Madison counties. This federation lasted until 1971.
- 1966 – South Central Federation which included Yellowstone, Carbon, and Big Horn Counties was formed. Billings Public was the headquarters with Shirley Hake as the coordinator.
- 1967 – Ruth Longworth, State Librarian - “A time for great things.” Prior to federations, Montanans believed only limited library service was possible, the federation demonstration with LSA and LSCA funds proved “library service of high standard can be a reality.”
- In 1970 federations were maintained by city or county funds. No state funds were given to the federations.
- In 1972 – state funding for federations was being sought. State funding would support 3 grant programs. MSL was proposing the state provide funding of \$900,000 to \$1,000,000.
  - Basic grant – for improving library services
  - Establishment grant – for adding new libraries to a federation
  - Special projects – for construction or enhanced services
- 1972 – Golden Plains Federation is formed with headquarters in Glasgow. Alene Cooper is the coordinator. It includes Daniels, Phillips, Sheridan, and Valley counties.

- Montana Governor Forrest Anderson writes a 1971 executive order that state agencies and commissions use a 12 district multi-county set-up. The State Library drops the 6 federations into this model – placing 2-3 districts in one federation.
- 1971 federations
  - Pathfinder – same boundaries as today
  - Sagebrush – much the same boundaries as today. Rosebud was including in Sagebrush in 1970. That county has since been moved to South Central.
  - South Central – much the same boundaries as today. Only difference is Rosebud County
  - Northeast – same boundaries as Golden Plains
  - Northwest – same boundaries as Tamarack
- Clear vision in 1970 that the federations were to be regional library systems.
- 1972 – federation headquarters libraries are expected to provide ILL, CE, reference, and consulting.
- 1973 – still have the regional library system concept, however, we see the first recommendation to allow coordination rather than consolidation. State Library sets boundaries and defines headquarter libraries. Governing body of each unit of the federation appoints a lay person to serve on the federation advisory board.
- 1974 – Tamarack federation is formed. Missoula is the headquarters. It includes the Northwest Federation and surrounding counties.
- 1974 – there is a dispute about forming regional library systems versus having federations where libraries maintain their autonomy.
- 1974 – first federation legislation is passed. There is an ability to levy taxes for library services across a region.
- 1975 – the western federation is split into two. There is one federation that includes Lincoln, Flathead, and Sanders County. The second federation has the remaining counties that are in the current boundaries of Tamarack. 33 libraries in 23 counties are members of a federation.
- 1975 – services from federations...headquarter libraries were expected to handle reference and ILL requests for patrons of counties within the federation. A liaison librarian maintained relationships between the headquarters and federation libraries.
- 1975 federations
  - Golden Plains – Glasgow is the headquarters
  - Pathfinder – Great Falls is the headquarters
  - Sagebrush – Miles City is the headquarters
  - South Central – Billings Public is the headquarters
  - Tamarack – Missoula is the headquarters
  - Northwest – Libby is the headquarters
- 1975 – Commission sets a long-range goal of all public libraries belonging to a federation. They allocated \$174,000 of LSCA dollars for this purpose.
- 1976 – 72 libraries in 44 counties participate in federations.
- 1976 – MSL appears to provide bookmobiles for the federations. There is a demonstration project to encourage libraries to join federations. Before the project began 25 counties belonged to a federation. One year later in 1977 – 42 counties and 11 cities contracted for services.

- 1977 – Commission puts out a statement that the role of federation advisory boards is to create goals that address the development and strengthening of library services as prescribed in the Montana Public Library Standards.
- 1979 – the legislature provides coal severance tax funding for library federations. It was 1% of the interest revenue. It appears to have given library federations \$400,000-\$500,000 more than twice what federations receive today (2021).
- 1982 – there is a federation review to look at funding, accountability, and governance. There is a suggestion to make federations non-profit corporations.
- 1983 – see the first reference to MSL providing consulting services rather than federation headquarters
- 1984 – plans of services and annual reports are required. It's important to note that during the early 80s federations were receiving significantly more money and were using that to fund staff to support library services in other libraries. There begins to be a shift where some of the services provided by federation headquarters is shifting to MSL. This matches a move to online, union catalogs.
- In the 70s and 80s, federation advisory boards appear to have a lot more power. They approve budgets, contracts, and select headquarters.
- 1984 – see first reference to federations including multi-type libraries (rather than just public). The idea is that multi-type libraries will strengthen federations.
- 1980s – there are serious concerns over how administrative costs are being calculated.
- 1980s – federations could carry over funding
- 1980s – Commission releases the following guidelines for federations. Priorities are 1) Resource sharing of materials 2) resource sharing of services – centralized ordering, resource center 3) resource sharing of people – admin, PR, programming, evaluation, consulting and 4) resource sharing of funding – individual grants to libraries
- 1986 – coordinators urge Commission to look at funding formula and find alternative funding sources. Coal revenues begin to decline.
- 1986/1987 - dramatic reduction in funding. Federations see their revenues go from \$300,000 to \$136,253. Coordinators begin discussing what federation services can be handled at the local level.
- 1987 – reference to tension between big and small libraries. There is a suggestion to remove large libraries from the federations and having only small libraries as they benefit the most.
- 1987 – legislative work to change the definition of federations to include other types of libraries begins.
- 1990 – State Library urges coordinators to spend all funds by fiscal year end.
- 1991 – see the first reference to a \$1,000 base grant for individual libraries.
- 1994 – another federation task force is established – charges are similar to 1982.
- 1996 – begin seeing Internet access added to services provided by/paid for through federations
- Late '90s - still seeing more “centralized” services but now see money going to individual libraries instead of just the headquarters.

#### Federation review/options work (1982 - 1986)

- Reasons for review

- Possible conflict of interest for headquarters librarians who are both the library director at their library and the coordinator
- Declining revenue
- Need to define “basic library services”
- Concerns about the satellite model whether there is a headquarters and a satellite headquarters
- Funding formula concerns – is it fair
- Desire to consider national trends which included more multi-library type cooperation
- Coal Severance Tax begins to decline prompting State Library Commission to direct then State Librarian, Sara Parker to investigate how to meet MCA 15-35-108 (copied language from 2021 MCA - The amount of 0.90% in fiscal year 2020 and 0.93% in fiscal year 2021 and in each fiscal year thereafter must be allocated for provision of basic library services for the residents of all counties through library federations and for payment of the costs of participating in regional and national networking and must be deposited in the basic library services account established in **22-1-202.**”
- Sara obtains feedback from library directors and coordinators. At this time federation advisory boards have a lot of power.
  - Key important services: CE, consulting, reference, annual meetings, ILL, pre-shared catalog stuff, networking, having federation coordinators work with MSL on planning and hearing about what is going on around the state.
- Georgia Lomax, Miles City Public Library – says “federations take individuals, link them into a local network, and help them tap into a larger network.”
- Alternatives presented by State Librarian
  - Keep services, but reduce them
  - Combine federations
  - Move services to a centralized location (MSL)
  - Contract with individual libraries to provide basic services
  - Disperse CST funds directly to libraries
- December 12, 1986 – Commission votes to keep all 6 federations and some services. MSL will contract with entities to provide reference, children’s services, and consulting. MSL will also be responsible for ILL and some of the financial work. They will also try to make up for the loss of CST funds.
- Other recommendations from the review
  - Add other types of libraries
  - Each federation has a governing body. Each member has 1 vote. Federations retain their current boundaries.
  - Core services are ILL, CE and Consulting, Reference, and Children’s Services. Note: ILL and Continuing Education remain strong programs today.
  - MSL provide continuing education and resources for board members.
  - Federation members be politically active
  - Statewide funding be pursued due to local/regional funding not always being there
  - Additional reporting – standardized form and statistics
  - Federations set up cooperative collection development and a statewide plan for collection development is created

- Challenges noted by the review
  - Federations achieving their full potential
  - Lack of understanding and vision of what ideal services might be
  - Fear of losing what one already has
  - Indifference

#### Funding/reporting notes

- Federations receive a high of \$430,000 in 1982 and a low of \$80,621 in 1993. MSL recently increased funding for federations to \$225,000. This funding was primarily CST, but in the 90s we had the Information Access Montana Act which included a \$1,000 base grant for every public library in a federation.
- Current reporting system has been in place since 1982. Note: parts of the current reporting process are referenced in Montana Code. However, the Administrative Rules drive a lot of the reporting requirements.
  - Plan of Service should be a long range plan for library development in the federation. It should list program or service, purpose of the program, goals and objectives, and how it will be implemented
  - Annual report should include a narrative, evaluation of programs, and an expenditure report

#### Federation review and results (1992)

- Blue Bear Group completed a federation study that had a lot of dissension.
- 5 proposed actions from the Blue Bear study
  - Continue federations without changing the structure
  - Disband the federations – give the money directly to local libraries
  - Strengthen them by giving them more money and support
  - Replace them with non-profits
  - Redesign and expand them – give them self-governing powers, MSL will provide more support by hiring 2 librarians to serve as field specialists. This is the recommendation that Blue Bear chose.
- 1993 - Commission adopts a draft recommendation with the following parameters
  - Keep current boundaries but create larger districts with combined federations within them.
  - MSL will provide 2-3 traveling, regional consultants, so headquarters libraries no longer have to provide this service
  - Encourage multi-type membership
  - Federations should work on statewide Internet access and tech-based network (pre-shared catalog)
- 1994 – recommend headquarters library be dropped and coordinator role be rotated throughout the federation

#### Changes in the focus of federations

- 1960s – individual library development was the focus
- 1970s – shift to resource sharing and backup services
- 1990s/early 2000s – shift to technology focus