MONTANA **State Library**

Statewide Library Resources (SLR-LD) Report
April and May 2015

Prepared for the June 23, 2015 Commission meeting
by Sarah McHugh, Director of Statewide Library Resources

This report represents accomplishments of Statewide Library Resources Library Development staff: Ken Adams, Jennifer Birnel, Jo Flick, Jessie Goodwin, Jemma Hazen, Pam Henley, Amy Marchwick, Lauren McMullen, Cara Orban, Mike Price, Suzanne Reymer and Della Yeager.

Goal One—Content

1. MSL acquires and manages relevant quality content that meets the needs of Montana library users.

1.1. Enhance Montana State Library's statewide e-content subscription and purchase programs.

1.2. Work collaboratively toward developing, managing, presenting, and preserving Montana-relevant digital content.

SLR Work Objectives:

- Develop and articulate a method and schedule for collecting and evaluating statistics on content provided through SLR LD projects to better understand that content's effectiveness and usage. (*Lead staff: Cara Orban, Jo Flick*)

(Update: June 2015) In October Orban collected information from project managers to identify what statistics they collect, when, where, and why for the Montana Shared Catalog, Montana Memory Project, OCLC, EBSCO, Homework MT, and MontanaLibrary2Go. Next steps are to develop a procedure for evaluating statistics and research additional options for statistics evaluation training.

- Develop and promote the e-content expansion pilot and encourage Montana libraries to contribute or provide referrals to locally created content. This effort will benefit library patrons by providing unique, local works of fiction and non-fiction and enable participating libraries to build e-content collections independent of third party providers. (*Lead staff: Cara Orban*)

(Update: June 2015) IT staff Stacy Bruhn and Tom Marino completed work on the interface in February 2015. Orban completed loading 21 available e-books in March 2015. The MontanaLibrary2Go Selection Committee has developed a procedure for considering titles that are recommended for the pilot, whose scope is limited to content created or published in Montana or otherwise containing subject matter relevant to Montana. Next steps are to conduct more extensive testing within the MontanaLibrary2Go Selection Committee group to ensure authentication and downloading functionality is set and to create a selection process for adding new titles that includes membership input.

- Evaluate ongoing costs, funding opportunities and storage options for CONTENTdm that meets current and future storage needs, putting the Montana Memory Project in a strong position for future growth.   CONTENTdm is the digital content management system administered by OCLC that is used by MMP contributors to upload digitized materials and create metadata for those materials. (*Jennifer Birnel*)

(Update: June 2015) A decision has been made between MSL and the Historical Society Research Center to have the Historical Society manage all digital newspapers, in order to alleviate our ongoing storage issues in the MMP. The Historical Society is looking for a new product to host newspapers that is part of a larger regional and national effort. Newspapers will be moved to this new environment when it becomes available, but will still be considered part of the overall MMP collections. The MMP is not adding newspapers at this time.

- Launch a new MSC EBSCO Host e-book collection, offering another accessible e-book collection to all MSC library patrons.   *(Lead staff: Ken Adams, Mike Price)*

(Update: June 2015) MSL has obtained a draft licensing agreement from EBSCO while they confirm which MSC libraries currently have access to EBSCOhost e-books based on the NetLibrary contract that was brought over from OCLC. OCLC is to provide new MARC records for titles purchased thru NetLibrary that are still relevant. Further work was delayed due to the MSC reorganization project and Enterprise implementation, as well as waiting for eResource Central to be implemented as a tool for managing the collection. The MSC Executive Board will discuss this ongoing project further during their 2016 Summer Retreat.

- Discuss with libraries the option of adding additional content to the DiscoverIT collection of resources and negotiate with EBSCO to lower the cost of adding individual subscriptions and content repositories to DiscoverIt. Continuing to expand the resources available in this statewide integrated discovery tool will make it an even more effective, one stop search tool that Montana librarians envisioned and have requested over the last decade.   *(Lead staff: Cara Orban)*

(Originally reported February 2015) The Network Advisory Council met December 18 and voted to accept EBSCO's offer to add resources (Home Improvement Reference Center and Hobbies & Crafts Reference Center) and upgrades (Literary Reference Center Plus, MAS Complete, MasterFILE Complete) to the statewide suite of online research databases with no

change to the current contract cost, by extending MSL's contract with a second renewal through August 31, 2017. All other terms of the contract will remain in place. This recommendation delays the Request for Proposal process for the primary suite of statewide databases for another two years, and allows SLR staff to continue training and outreach to libraries for these existing resources, through the Discover It search tool.

(Originally Reported April 2015) Orban worked with EBSCO Support staff in February and March to prepare new interfaces and resources for all Montana libraries: Explora, Hobbies & Crafts Reference Center, Home Improvement Reference Center, Literary Reference Center Plus, MAS Complete, and MasterFILE Complete. These new and upgraded resources are included as part of MSL's FY16-17 renewal with EBSCO at no additional cost.

(Originally Reported April 2015) In order to help the Network Advisory Council make a decision about the use of remaining state FY15 Coal Severance Tax funds, Orban gathered information on access, content, and statistics for three different sets of online resources: EBSCO Research Databases, Safari Tech, and Tutor.com. This information and ensuing discussion led to the NAC's decision to approve these one-time purchases, effective immediately:

$15,500 for 2,000 additional tutoring sessions, available to all Montana library users

$8,858 for additional Safari Tech SU, slots for MT library staff and state agency staff

$5,642 for additional EBSCO ebooks for public library user access

(Update: June 2015) Working with liaisons Henley and Alana Mueller-Brunckhorst as well as directly with library staff, Orban has engaged in efforts where appropriate to increase awareness of content customization and linking options within Discover It. These efforts include direct communications and support as well as development of instructional materials for the Learning Portal and the Montana Library Directory.

- Identify 4-6 communities in Montana that have rich collections of unique materials related to Montana's economic, social, cultural or political history or materials that document a more current transition, such as the Bakken project. Encourage these communities, in partnership with their local library, to add these collections to the Montana Memory Project. *(Jennifer Birnel, Pam Henley)*

(Originally reported February 2015) The Montana Memory Project was invited by the Mountain West Digital Library and the Digital Public Library of America to participate in the [Public Library Partnerships Project](#) funded by the Bill and Melinda Gates Foundation. This project provided digital skills training for librarians including digitizing, describing and exhibiting their cultural heritage materials online through DPLA exhibitions. Six of the twelve participants were able to prepare collections in the short turnaround time of one month and sent their items in December to the vendor to be digitized.

(Originally Reported April 2015) Four of these projects are now published in the MMP:
- Hobson Community Library - Early Agriculture and Homesteading in Judith Basin County
- Judith Basin County Free Library - Sheep Ranching in Judith Basin County
- Billings Public Library - Billings Images of People and Images of Events
- Roundup School Community Library - Musselshell Valley Historical Photographs

(Update: June 2015) Henley and Birnel created an extensive list of libraries to contact and have since reached out to each one. Several of those contacted in our efforts participated in the PLPP training offered by DPLA. Birnel has continued to do more outreach since the first of the year and have had some very fruitful conversations with libraries and museums. Mid-year, Henley's specialty area was changed to providing training and support to public libraries customizing their Discover It profiles. Outreach and visits included Cut Bank, Browning, Malta, Augusta, Belt, Cascade, Conrad, Fort Benton, Ennis, Twin Bridges, Ekalaka, Wibaux, Simms, Stanford, Lincoln, Belgrade, West Yellowstone, Broadus, Virginia City, Roundup, Miles City, and Glacier National Park.

- Collaborate with staff of the Montana Historical Society and the Montana Office of Public Instruction to create classroom lesson plans for the Montana Memory Project so that teachers can easily incorporate this resource into their yearly teaching activities. *(Jennifer Birnel)*

(Originally Reported April 2015) Birnel and Yeager met with Historical Society Staff to further develop this effort and to add to the lesson plans now available in the MMP.

(Update: June 2015) Birnel presented to MEA-MFT conference participants about adding their own lesson plans to the MMP educational resources page. Birnel revamped the page and created some lists of skills activities teachers could use as lesson starters or discussions. Yeager has created several ready-made PowerPoints on specific topics, using images from the MMP. Colet Bartow has invited us to do a webinar with teachers and Birnel has applied to present again at this fall's MEA-MFT conference.

Goal Two—Access

2. MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.

2.1. Improve the user interface of MSL's Web sites and improve and expand online service to meet changing user needs.

2.3. Improve Montanans' access to library materials (including discovery, request, and delivery), providing more materials to choose from, and making access increasingly efficient.

2.5. Assist Montana libraries with 'fulfillment', that is, getting the right library content into patrons' hands quickly, efficiently, and at prices that libraries can afford, regardless of whether the item is owned by the patron's local library.

2.6. Publicize Montana State Library's services and resources.

2.7. Support Montanans' continued free access to the Internet provided through local public libraries.

2.8. Actively investigate and implement, as appropriate, web-scale solutions including web-scale integrated discovery systems, cloud computing, centralized indexing and harvesting of content, to make the resources of Montana libraries discoverable in a single search.

<u>SLR Work Objectives:</u>

- Evaluate how the SLR portal is presented in the overall MSL site by informal conversations with Montana library staff and as part of regular trainings on the portal, to provide a truly helpful, easily navigable web resource for library development. *(All staff)*

(Update: June 2015) An SLR Portal training was presented at the 2014 Fall Workshops.

- Carry out usability testing by Montana library staff on the SLR web pages to better understand areas that need improvement or changes in design. *(Lead staff: Cara Orban)*

(Update: June 2015) Task-oriented usability testing across the Learning Portal and the SLR Portal is now in progress. SLR staff has plans to conduct at least one online testing session with Montana library staff before June 30 in addition to testing in person when possible. The test audience is asked to navigate from the MSL home page to specific resources, and their process and reactions are documented to help the SLR website group understand where improvements to the website might be made.

- Create a regular schedule of analyzing usage of all SLR pages, and using Google Analytics. *(Lead staff: Cara Orban)*

(Update: June 2015) Tom Marino confirmed that all SLR pages are set up with Google Analytics in March 2015. Orban collects monthly reports on SLR Portal activity.

- Working with the MSL Marketing Coordinator, update the "For the Public" website (http://mymontanalibrary.org/). New content and links will include access to community resources and resources that celebrate services provided by libraries. *(Lead staff: Lauren McMullen, Cara Orban)*

(Originally Reported April 2015) Sara Groves, McMullen, Orban and McHugh identified primary sections that would make up the new My Montana Library site: 1.) access to library services and content; 2.) library-community partnerships and 3.) Montana's unique literary and cultural resources. Next steps are to create mock up web pages showing the structure and content suggested for each section.

(Update: June 2015) An initial draft of the redesigned site is currently being built based on these themes, with more work to come in FY16.

- Working with the MSL Marketing Coordinator, budget for and implement innovative and effective promotional materials that best publicize the statewide resources available through DiscoverIt. *(Cara Orban, Jennifer Birnel, Ken Adams, Jo Flick)*

(Originally Reported April 2015) Groves and Orban have identified specific databases that are easily promoted through radio spots and social media. A simple prototype of a small card that users could keep in their wallet with links to Discover It, and simple authentication information is also being developed.

(Update: June 2015) Throughout FY15, Orban worked with Groves to develop promotional images and materials (press releases, website content, and radio ads) for Share your Story, Montana Makers, Discover It, and the EBSCO statewide databases targeted to specific audiences (auto repair, health, hobbies and crafts, and home improvement). MMP brochures have been created and made available to interested contributing institutions. An MMP poster is currently under development. On-going social media posts about the MMP have generated interest and the MMP will trial some boosted posts. Facebook is designed to help pages market their material to a wider audience by boosting posts. Boosted posts get pushed to targeted audiences. The goal is achieve more likes on the page.

- Optimize the use of our central user authentication software, EZproxy, within Discover It, MontanaLibrary2Go Local and other potential projects by improving instructions in the Library Directory, raising awareness of EZproxy among MSL staff, and providing online and in-person training opportunities for library staff. The benefit to the Montana library user is a single, one-time authentication process when accessing resources outside of the user's local library *(Cara Orban, Mike Price, Ken Adams)*

(Originally reported December 2014) Liaison partnerships have been developed with the purpose of providing more focused training and outreach by library type for searching and customizing the Discover It integrated search tool for their own library. Discover It is the EBSCO Integrated Discovery Service (EDS), which is a product of EBSCO. The Statewide Projects Librarian will continue to focus on proactive promotion to all library types; contract administration and communication with EBSCO and content partners; integration of new content or individual subscriptions on behalf of libraries; in depth assistance to libraries that want to customize Discover It by creating system profiles just for their library users; assistance with authentication setup; preparing and organizing focus groups and surveys; collecting and analyzing usage statistics; and working with the Statewide Trainer to determine training needs and organizing learning opportunities. Liaisons are asked to help disseminate information about Discover It to colleagues where appropriate; assist with basic customization questions; help increase awareness of available information about Discover It and EBSCO statewide resources within the Library Directory and on the Learning Portal; advise on creation and improvement of instructional or promotional materials; and assist with efforts such as formal training, surveys, and focus groups.

(Originally Reported April 2015) Orban worked with Henley and Electronic Resources Librarian (LIS division) Alana Mueller-Brunckhorst in March to revise Discover It and EZproxy

instructional resources, which are now available through the Montana Library Directory in "View Discover It Access" and "View EZproxy Access," and the Learning Portal. This information is made available to Montana library staff in order to simplify and provide greater clarity to those resources so that they can be used in Discover It liaison outreach and training.

(Update: June 2015) Working with identified Discover It liaisons, in March 2015 Orban revised the EZproxy and Discover It authentication documentation available to library staff through the Montana Library Directory. EZproxy was successfully implemented as the authentication tool for the MontanaLibrary2Go Local website. Next steps are to lead a brief learning session for SLR staff and an online session for Montana library staff.

(Update: June 2015) Through use of Application Program Interface (API) commands developed by EBSCO and SirsiDynix, seamless integration between the MSC's Enterprise search profiles and the EBSCO Discovery System (Discover It) is now working and being implemented for all MSC member libraries. This integration provides simultaneous searching of the MSC catalog and the resources combined under the Discover It search tool, including the statewide databases. Future enhancements announced by both vendors will fully integrate these two products that will further improve the end-user experience. Adams and Price led this significant work. Adams also contributed his knowledge of this process to the wider Sirsi Dynix system administration community.

- Investigate the potential of a centralized RFP process for at least some pieces of the E-rate program to see if this would be more cost effective for participating libraries.   *(Suzanne Reymer)*

(Update: June 2015) This objective continues to be in process. We've determined that the state cannot procure services for city or county libraries without a letter or agency from each local jurisdiction. We are continuing to pursue something more akin to a state master contract where service providers could be encouraged to offer more uniform services and pricing statewide and individual libraries could choose whether or not to take advantage of these offerings.

- Investigate the possibility of a central approach for completing and submitting Form 470, a form used to facilitate the competitive bidding process required for an e-rate application, to see if there are cost and time benefits to participating libraries. *(Suzanne Reymer)*

(Update: June 2015) This objective also continues to be in process, for similar reasons described above. The 470 form is not the most time consuming form. Consistent pricing and services would be an improvement for most libraries.

- Investigate and test returning to a local instance of CONTENTdm for the MMP, which could speed up search results and download times for end users across the state. *(Jennifer Birnel)*

(Update: June 2015) This objective has been combined into the MMP RFI/RFP process (see evaluation of the next objective below).

- Launch an RFI and possibly an RFP process to investigate options for new MMP software in order to learn more about alternatives to CONTENTdm. *(Jennifer Birnel)*

(Originally Reported April 2015) Birnel has received eleven responses to an RFI launched in February. A review committee representing the State Library, the Historical Society Research Center, University of Montana Mansfield Library, Montana State University Library and a public library representative from the Lewistown Public Library will assist Birnel in studying these responses.

(Update: June 2015) The RFI in this process has been completed. Thirteen responses were returned and reviewed by the committee. The committee determined there were enough products now available that offer similar services to CONTENTdm to warrant pursuing an RFP. An RFP will be written and released, in July-August 2015.

- Create and implement a cost share formula for a statewide courier contract to provide a more stable, long term, affordable option for a statewide library courier service. *(Cara Orban)*

(Update: June 2015) The current cost per library is described in the evaluation of the next objective below.

- Coordinate an RFP process to secure a centralized contract for a statewide courier service. *(Cara Orban)*

(Originally reported February 2015) MSL signed a contract with Critelli Couriers, effective January 1, for delivery service to Montana libraries. The cost to participating libraries that sign an agreement with Critelli is $23 per stop, with a $2 per stop subsidy applied from FY14 LSTA for courier development. Great Falls Public Library, Havre-Hill County Library, and Montana State University – Northern will take advantage of this discount and join the courier service in February. MSL staff worked with Critelli to gather signed participation forms, and prepared previous year interlibrary loan statistics and new statistics collection procedures to share with Montana Shared Catalog sharing groups and with the Courier Advisory Board. One expected outcome from expanding the service area is that the volume of materials being moved through the courier will increase, lowering the overall cost per item shipped via courier.

(Originally Reported April 2015) A courier web page was created in February to provide up-to-date information about the statewide courier contract and the Montana Courier Alliance. The web page, "Montana Courier Alliance," is available on the Statewide Library Resources website, under "Statewide Projects." With the 2015 contract for courier service, the State Library is making an effort to collect more accurate and complete statistics than have been available in recent years. In January, Montana Courier Alliance libraries reported 174 stops and 1102 crates moved to and from libraries. In February, with the addition of drop sites at Great

Falls Public Library and Havre-Hill County Library (also serving Montana State University – Northern), libraries reported 188 stops and 1,297 crates moved. Four locations had yet to report their February statistics at the time of writing this report.

(Update: June 2015) MSL signed a contract with Critelli Couriers, effective January 1, for delivery service to Montana libraries. The cost to participating libraries that sign an agreement with Critelli is $23 per stop, with a $2 per stop subsidy applied from FY14 LSTA for courier development. The Commission approved FY15 LSTA funds to continue this subsidy through September 30, 2016. Great Falls Public Library, Havre-Hill County Library, and Montana State University – Northern joined the courier service in February, bringing the total number of libraries with direct service from Critelli to 19. Orban worked with Procurement and with the Courier Advisory Board to draft the Request for Proposals document and the contract; worked with Critelli to gather signed participation forms; prepared previous year interlibrary loan statistics and new statistics collection procedures to share with Montana Shared Catalog sharing groups and with the Courier Advisory Board; developed a web page for the courier on the Statewide Library Resources site; collected monthly statistics from the courier drop site libraries; and coordinated a meeting of the Courier Alliance at the 2015 Montana Library Association conference. One expected outcome from expanding the service area is that the volume of materials being moved through the courier will increase, lowering the overall cost per item shipped via courier. For January through March 2015, the Alliance reported an average of 1,300 crates shipped monthly (90% of participating libraries responding each month). Crates may hold up to 25 items. The libraries have not been asked to provide an item count. Critelli makes between 175 and 215 stops per month at Alliance libraries.

- Investigate and educate librarians about OCLC's new discovery system as it becomes available, so that there is understanding among Montana librarians of this additional integrated search tool available at no cost through our OCLC group services. *(Cara Orban, Suzanne Reymer, Pam Henley, Lauren McMullen)*

(Originally reported December 2014) Orban met with OCLC staff and attended two hour-long trainings to prepare a strategy for statewide implementation of the new WorldCat Discovery Services, a new end user interface with discovery capabilities which will replace the OCLC FirstSearch software platform. FirstSearch will be discontinued in December 2015.

(Originally Reported April 2015) Orban is alerting librarians via the Wired and MSC listservs about upcoming online OCLC trainings and resources. This outreach is being coordinated with OCLC staff.

(Update: June 2015) Orban provided registration information and notice of training opportunities to Montana library staff through listservs and in person beginning in November 2014. A training and orientation session for WorldCat Discovery was scheduled for the Montana Shared Catalog meeting on May 7.

- Gather data about bandwidth through the public library statistics and the new speed test tool to better inform us on the current situations in libraries. *(Suzanne Reymer)*

(Update: June 2015) 40 libraries participated in broadband speed test. We've begun looking at data largely in comparison to nationwide broadband goals for libraries.

- Meet with the appropriate staff of the Montana Telecommunications Association to gain a more in depth understanding of the structure of and technical language used in the telecommunications industry in Montana. This knowledge will be gained in order to more effectively communicate with librarians and participate in high level planning efforts related to broadband. *(Lead staff: Suzanne Reymer)*

(Originally reported February 2015) Reymer participated in numerous phone calls and webinars on E-Rate Modernization and the new Form 471. She helped beta test the new online form and provided feedback to the Universal Service Administrative Company about issues and problems, informed Montana librarians of changes that would potentially impact their E-Rate funding during the State Librarian's Webside Chat in December and during a January webinar, and held an additional webinar in January to introduce librarians to the new online Form 471. These efforts continue to ensure that Montana libraries are represented in the national discussions regarding changes to E-Rate and that Montana librarians participating in E-Rate have the most current information about these changes and are trained in the new form.

(Originally Reported April 2015) Reymer has been working with 48 public libraries across the state on their E-Rate applications. E-Rate modernization has created changes in the programs and forms which have been challenging to experienced and new applicants. There are several new library directors applying for E-Rate for the first time this year who have required additional assistance.

(Update: June 2015) Reymer met with Geoff Feiss of MTA in Fall, 2014 to discuss current state broadband situation and future endeavors. Contact will continue as needed.

Goal Three – Training

3. MSL provides appropriate trainings and training resources so that the best use can be made of the resources offered.

3.1. Enhance Montana State Library's statewide training opportunities including all formats with client-learning as the Library's goal.

3.2. Provide users with trainings and assistance related to statewide offerings and resources.

3.3. Develop and present appropriate library leadership training for Library Directors and Trustees.

3.4. Provide regular training opportunities for MSL programs and services.

3.5 Train and assist users to contribute content to MSL's collections.

3.6 Provide a central repository of training materials in various formats that support and make successful ongoing statewide projects and MSL resources and services.

SLR Work Objectives:

- Create a training evaluation approach that all LD staff doing training will apply consistently and that is tied to CE, to more effectively and consistently provide training in all areas. *(Lead staff: Jo Flick)*

(Update: June 2015) MSL training staff met for half day trainings and retreat facilitated by Flick on July 23, 2014 and on March 17, 2015. A subcommittee was formed to create an evaluation tool that all staff could use or easily modify for use that would collect outcomes data rather than just satisfaction data. The standard evaluation tool will be reviewed by MSL management before it will be available as a beta-tool for use.

- Evaluate SLR and vendor provided training through the creation and utilization of standardized evaluation tools that are also tied to CE, so that CE requirements are a consideration in the training evaluation process. *(Lead staff: Jo Flick)*

(Update: June 2015) This objective was not accomplished, due to focus on other internal training work described in this report. This objective may be included in the FY 16 SLR-LD work plan.

- Participate in a train the trainer event to improve training skills. *(All staff)*

(Originally Reported April 2015) Flick held a second event for those MSL staff who train, focusing on evaluation methods. An agency wide training evaluation tool is being developed out of this session, so that benchmark training evaluation criteria is consistent for all MSL programs, enabling MSL to identify trends and patterns in the trainings we provide and better track training needs.

(Update: June 2015) SLR staff provided 8 Webinars on best practices for library trainers related to optimizing use of the DiscoverIt search tool.

- Produce training webinars about library districts so that interested librarians and trustees can easily access essential information about districts, on demand. *(Lauren McMullen, Pam Henley, Suzanne Reymer, Jo Flick)*

(Update: June 2015) Public library directors and trustees attended a webinar on Montana public library funding and governance structures. Attendees gained an understanding of the how the district governance structure differs from other public library governing structures. This understanding helps directors and trustees in planning for the futures, and also allows the

library to meet the enhanced General Public Library Standards. The recorded webinar is available for on demand viewing.

(Update: June 2015) With the GoToTraining and Camtasia licenses consultants can begin to plan and produce appropriate webinars and other recorded training in FY 16 which will help directors and trustees better understand the district planning process.

- Develop an MSC plan to address staff turnovers in MSC libraries, particularly schools, to improve communication when there is new staff, reducing gaps in knowledge. *(Ken Adams)*

(Update: June 2015) Initial information has been gathered from other consortiums on how they deal with member library staff turnover and training. The initial documents needed for a "turnover" packet are in development, due to be completed by the end of June, 2015.

- Develop a training curriculum for new MSC software and services to ensure that all MSC librarians receive the training needed when there is new software and services. *(Lead staff: Amy Marchwick)*

(Update: June 2015) Due to staff turnover and the MSC Reorganization project, this objective has been delayed. Goodwin, the new MSC trainer is now the lead on this task and has begun the process of developing a curriculum and methodology for delivering MSC training presentations and materials. Goodwin has prepared several training videos and has given her first, in-person training sessions during MLA and at the MSC Spring meeting. Training materials are being developed for the new MSC Enterprise search interface along with end-user instructional materials for the MSC's "Shoutbomb" text messaging service.

- Provide short, recorded webinars on the resources available to libraries that enable them to create compelling charts and visual reports drawing from the data in their public library statistics. These recordings will be available for viewing from the Learning Portal at the librarian's convenience. This effort will be undertaken in order to assist libraries in telling their stories to their local funding bodies and communities. *(Suzanne Reymer, Lauren McMullen, Pam Henley, Jo Flick)*

(Update: June 2015) Library directors and trustees have on demand access to short, recorded tutorials that show how to generate historical, ranking and performance reports in the Montana Statistics Center. The charts and visual reports can be used in library annual reports to communicate the impact of library services.

- Evaluate and implement as appropriate ideas coming from the COSLA CE Connector Committee to engage Montana librarians in national CE trends. *(Lead staff: Jo Flick)*

(Originally Reported April 2015) The CE Connector project of COSLA is yielding some useful resources for Montana Libraries: a collection of materials to help library boards when

they are faced with hiring a new director and a short webinar series that will serve as a general introduction for new library directors. Most of these resources will show up as links from the MSL Learning Portal later this Spring.

(Update: June 2015) The COSLA CE Connector Project concluded in April. MSL was a key participant in getting new content published to support library boards faced with hiring a new director. Flick was the convener for the national working group that reviewed content already available and developed new content for a website that COSLA will publish. Most of this content is already displayed in the MSL Learning Portal and was used to support the Spring Trustee Training clinics held at the Spring Federation meetings.

- Identify state and regional experts in the areas of succession issues, employment law, library budgets and local library-government relations who could be invited to present online and in person trainings at Federation meetings, Fall Workshop and MLA Conference. Ensure that these particular areas are included in presentation proposals made by MSL for these events. This will be done to strengthen library directors' understanding of and comfort with these areas. *(Suzanne Reymer, Lauren McMullen, Pam Henley, Jo Flick)*

(Originally Reported April 2015) MSL contracted with Sage Solutions to provide succession planning training for trustees and library directors using FY14 LSTA funds designated for trustee training. Sage Solutions' Terry Profota and her associate are presenting three hour sessions at the Broad Valleys, South Central and Golden Plains Spring Federation meetings. The first session at the Broad Valleys meeting was attended by 12 trustees and 2 library directors. The "Emergency Succession Plan Handbook" and a "succession toolkit" created by Sage Solutions and distributed during these sessions has been very well received and has resulted in increased understanding of the importance of strategic, operational and policy planning by library boards, in order to be prepared for succession situations.

(Originally Reported April 2015) McMullen presented webinar training on strategic planning to public, academic and special librarians. Strategic planning is especially helpful during periods of transition and succession, and when organizations are squeezed for resources. The session promoted the benefits of planning and introduced uncomplicated methods and tools. Several attendees expressed the intention to begin strategic planning this year.

(Update: June 2015) Montana Department of Administration staff presented training on budget laws, library budgeting and BARS for public library directors and trustees at Federation meetings in Wolf Point, Miles City and Fort Benton. Sage Solutions, nonprofit consultants from Bozeman, were hired to conduct succession planning and board development clinics for trustees and directors at four Spring Federation meetings: Golden Plains, South Central, Broad Valleys and Tamarack. These sessions were very well received and we plan continued work with Sage Solutions to create recorded webinars on these topics.

- Add a district transition template to the current Public Library District First Year resource so that libraries, boards and local governing and funding bodies can collaboratively work their

way through the district transition process. (Suzanne Reymer, *Lauren McMullen, Pam Henley)*

(Originally reported February 2015) A Public Library District Transition Planning Template was completed and made available to public libraries that are considering or are in the process of making the transition to a public library district. This interactive planning tool incorporates information from the *Montana Public Library District Handbook* and *Library District: a guide for the first year*. The template helps users develop timelines, communicate, and coordinate tasks in order to ensure a smooth transition. The release of this resource has generated new interest from librarians on the topic of public library districts.

(Originally Reported April 2015) Reymer and Henley participated in a district planning meeting at the Livingston-Park County Library. The city has seen a reduction in funds, which has in turn reduced the library's funding. The library is pursuing the possibility of forming a district to ensure a reliable funding source as well as the development of county-wide library services.

(Update: June 2015) A Public Library District Transition Planning Template was completed in October 2014 and is being promoted to libraries considering district formation.

Receive facilitation training to more effectively engage in local discussions between various parties about potential library districts, and other potentially controversial topics, so that these initial discussions are more effective and successful. *(Suzanne Reymer, Lauren McMullen, Pam Henley)*

(Update: June 2015) Henley and Reymer attended facilitation training provided through the State Professional Development Center, which will allow the consultants to better engage and manage discussions with libraries and their supporters, leading to positive outcomes when dealing with a variety of topics and issues.

- Spend time focusing on very small (1-2 person) library needs when planning trainings in all areas of library development in order to ensure that MSL trainings are relevant and accessible to all sizes of library staff. When planning trainings, consider libraries where the director is part time and wears many hats, does not have an MLS degree and where the library budget does not include the room for staff to travel regularly to conferences.*(All staff)*

(Originally Reported April 2015) United States Department of Agriculture local representatives presented a webinar on funding rural library buildings and programs.

(Originally reported April 2014): Based on recommendations from Montana maker space coordinators, young adult librarians, and school librarians, and from library development staff at the Idaho Commission for Libraries, ordered tools and materials for three kits that will circulate to Montana libraries beginning Spring 2014. Based on this order list, started organizing online training for library staff at the three initial hosting libraries. This training will provide an orientation to maker philosophy and expected pilot outcomes, as well as an overview on how to use the tools provided and develop public programming around them.

Maker spaces are collaborative learning and creative spaces that provide tools and materials for STEAM (Science, Technology, Engineering, Arts, and Mathematics) based programming and experimentation.

(Originally Reported April 2015): Montana Makers kits moved to six new libraries in February: Cayuse Prairie School in Kalispell, Lewis & Clark Middle School and Lockwood Intermediate School in Billings, Hobson Community Library, Lewis & Clark Library, and Missoula Public Library. Orban led two orientation training webinars for these libraries on January 27 & 29 to help familiarize library staff with the makerspace tools and materials in advance of receiving the kit, which was a suggestion that emerged from evaluations in Fall 2014. Orban led one, hour-long online session on January 28, introducing the Montana Makers pilot to an audience of 24 public, school, and state library staff from Montana as well as from Georgia, Iowa, Colorado, Vermont, and Virginia. Objectives for this webinar were to provide public or school libraries with a concise list of questions to help plan and prepare for developing a makerspace, particularly for libraries with limited space and budgets, and to introduce a selection of materials from the kits with details about pricing, potential audience, and relevant STEAM disciplines.

(Originally reported April 2014) Working with a team of three other MSL staff, continued work on the "Share Your Story" lifelong learning and outreach project that will circulate interview and programming kits to Montana libraries beginning Spring 2014, modeled after StoryCorps project and based around the themes of Wilderness, Work, and Women in Montana. Staff has cultivated partnership possibilities with the Montana State University film department and Montana PBS for training library staff and volunteers in video recording and editing as well as conducting quality interviews. Marketing materials are being developed to lend a consistent brand to this new LSTA funded statewide pilot. The main focus of the pilot is the library's outreach to its local communities and building on partnerships to expand public programming and lifelong learning opportunities in libraries across the state. Relevant content gleaned from this pilot may also be considered for inclusion in the Montana Memory Project.

(Originally Reported April 2015) Orban provided an overview of the Montana Makers and the Share Your Story pilots in two, hour-long presentations at the Montana Library Association Offline conference in Billings, February 6 and 7. The theme of the presentation was content creation and collection in the library. Approximately 30 library staff were in attendance at each session. Attendees from five public and school libraries followed up after Offline to request a maker kit later in the spring and summer, and one library expressed interest in hosting a Share Your Story kit.

(Update: June 2015) Critical needs for very small libraries is one of the three criteria which MSL staff will use as one of the data points to determine the composition of Fall Workshops. By aligning trustee training with federation meetings, we were able to reach additional small library trustees with critical information about succession planning and board development. Staff response is that meeting training needs has improved through consideration of all library sizes in our trainings.

Goal Four—Consultation and Leadership

4. MSL provides consultation and leadership to enable users to set and reach their goals.

4.2. Advise Montana Library Directors and Trustees regarding administrative concerns, such as funding, budgeting, policies, and personnel.

4.3. Establish and maintain contact with Library Directors and Trustees, and other MSL partners, to remain cognizant of their needs and the challenges they face.

4.5. Provide leadership and support to identify and address key information gaps for MSL partners and patrons. Gaps may include but are not limited to early literacy, access to sustainable Internet and technology services, access to legal and medical information resources, job related services and services to seniors.

4.8. Facilitate more state-wide purchases of content, supplies, and programs that benefit all Montanans through their local libraries.

SLR Work Objectives:
- Create a 5 year strategic plan for the MSC so that the consortium has a guiding document addressing growth, governance and system possibilities. *(Ken Adams)*

(Originally Reported April 2015) Adams and McHugh served in an advisory capacity on the MSC Strategic Planning Committee. The Committee has finalized a draft plan which was shared with the MSL Network Advisory Council on March 10 and has been submitted to the MSC Executive Board in preparation for the MSC Spring 2015 membership meeting. Following action on the plan by the membership, the MSL Commission will receive the plan.

(Update: June 2015) The MSC Executive Board appointed a subcommittee to develop an MSC strategic plan. The group began work on the plan in the fall of 2014. They shared a draft plan with the MSL Network Advisory Council in March and then presented the final draft of the plan to the MSC membership at the Spring MSC Membership Meeting on May 8. The plan, along with a revised mission statement, was unanimously approved as a 3-year plan. An annual, fiscal year MSC membership work plan, based on the strategic plan, will be developed over the summer by a new MSC committee. Adams and McHugh served in an ex-officio capacity on the strategic plan committee and will also serve on the work plan committee.

- Develop and undertake an annual visitation schedule of MSC libraries by the MSC Director in order to provide effective in person communication on an annual basis. *(Ken Adams)*

(Update: June 2015) This objective has been delayed due to staffing and workload issues. Adams has visited several member libraries while traveling to conferences or in conjunction with training visits. Impromptu discussions concerning the MSC have been held with non-member libraries while at the MLA and MEA conferences. Now that the MSC support team is fully staffed, more effort will be made in the summer to visit libraries throughout the state.

- Create an LSTA policy and procedures guide and provide training to assist MSL staff with the annual LSTA process so that staff have clear direction about the process, accessible through a central document. *(Cara Orban)*

(Originally Reported April 2015) Orban has created this internal guide with input from Jennie Stapp, Kris Schmitz and McHugh and it will be ready for use by Library Development staff as the FY15 LSTA projects commence.

(Originally Reported April 2015) Orban participated in three webinars during this period facilitated by the Institute of Museum and Library Services. The intention of the webinars was to prepare state library agencies for the new reporting framework for the Grants to States Program which will be in effect for the federal FY14 report, due December 31, 2015. Changes to the annual report correspond with the Measuring Success Initiative, which IMLS started in March 2011 to help IMLS and state library administrative agencies plan for, manage, and evaluate LSTA-supported library efforts. As a result of this training and new reporting framework:

- IMLS and state library agencies will be prepared to comply with new federal guidelines mandating that different types of data be collected and publicly accessible.
- A new system relying less on text narrative allows IMLS to gather and compare information in new ways and to better communicate this data to stakeholders. Likewise, reported data will be "bi-directional" and available for state library agency staff to efficiently search and discover data from efforts nationwide.
- The new system will have a public interface for the first time. This will allow for data transparency within and across states

(Update: June 2015) Working with McHugh, Kris Schmitz, and Jennie Stapp, Orban completed the LSTA manual for MSL staff in April 2015 and distributed to SLR-LD staff for final review and comment. The document was posted to the MSL intranet in May 2015 and will be used by staff implementing and managing LSTA funded projects.

- Launch a formal survey to evaluate the changes to consulting services at MSL in order to assist us in determining whether we are meeting the needs of all sizes and locations of public libraries. *(Suzanne Reymer, Lauren McMullen, Pam Henley)*

(Update: June 2015) This survey was accomplished, resulting in the decision to re-establish consulting territories on a three-year rotating basis, while continuing the consultants' focus on specialty areas. This will enable the consultants to better develop relationships with assigned libraries, better balance work load, and provide libraries with a consistent point of contact.

- Explore opportunities for additional partnerships that enable libraries to temporarily provide traveling exhibits of interest to their local communities, expanding the idea of libraries as community anchor institutions. *(Lead staff: Jo Flick)*

(Update: June 2015) A possible partnership between Fish, Wildlife and Parks to create and distribute a Bear Awareness exhibit was discussed, but the FWP project was ultimately not funded. The Women's Suffrage exhibit panels continue to circulate around Montana through Summer, 2015.

- Attend the Association of Rural and Small Libraries and the Public Library Association 2015 conferences so that LD staff are in tune with the challenges and opportunities for collaboration beyond Montana. *(Staff to be determined)*

(Update: June 2015) Henley and Orban will attend the ARSL conference in Little Rock, Arkansas in October 2015. Orban will present with Idaho Commission for Libraries consultant Sue Walker on makerspace best practices for small and rural libraries, with findings based on a comprehensive survey of Idaho and Montana libraries to be conducted over the summer of 2015.

- Provide an "MSL Room" during the 2015 Montana Library Association conference in order for librarians to ask MSL staff questions about matters of interest and network with each other. *(Staff to be determined)*

(Update: June 2015) While an MSL Room was not provided at the annual conference, the SLR-LD staff purposely sought out new library directors at the opening conference reception, led by the State Librarian. This outreach was publicly promoted in the conference bulletin.

Goal Five—Collaboration

5. MSL promotes partnerships and encourages collaboration among its users.

5.3. Assist users in developing collaborative relationships and cooperative projects with other state, regional, national, or international partners (libraries, schools, colleges, museums, archives, local and tribal governments, non-profit organizations, government agencies, the business community, et cetera).

5.5. Assist partners in developing web-accessible Montana-related digital content, and provide Montanans with access to digital collections and items relating to Montana's cultural heritage.

5.6. Promote library-related automation, data, networking standards, and web-scale solutions.

5.7. Work toward regional cooperative efforts, programs, and products that bring additional information value to Montanans.

<u>SLR Work Objectives:</u>

- Add to the sophistication of the Library Directory for optimum utilization by all library staff in Montana. New features planned for FY15 are adding the ability to track CE credits through a library's Directory profile and offering the option of creating and saving within the Directory individually customized, interactive transition planning templates for new public library districts. *(Lead staff: Mike Price)*

(Update: June 2015) Montana librarians can now easily track and archive their CE credits through their individual Directory accounts. Steps have been added to the Directory to ensure that CE records are not lost if a library staff leaves a library or is hired by another library.

(Update: June 2015) Though the Public Library District Transition Planning Template is now available, we have not been able to offer users the ability to save this interactive template to a library's Directory pages. This option continues to be under investigation.

- Complete the MSC reorganization effort. The remaining work for FY15 will be changing the circulation policies of the individual libraries not participating in an MSC user sharing group , customizing the item category drop down lists in the system so that each library's list only contains those categories used by the library, reviewing scheduled system reports following the circulation policy changes and removing scheduled reports from the system that are no longer necessary. SirsiDynix, the company that provides the MSC integrated library system, will remove all policies that will no longer be used by the end of calendar 2014. These final steps in the MSC reorganization will make the MSC a successful tool for quality library development and cost effective for its members. *(Ken Adams, Mike Price, Melody Condron, Amy Marchwick)*

(Update: June 2015) Due to staff turnover and a longer than anticipated timeframe needed to conduct one-on-one consultation with libraries, this project has not yet been completed. The most difficult part-- item types, home locations and standard circulation policies-- has been completed but we cannot have Sirsi Dynix remove system policies that are no longer in use until all the libraries have had their policies re-configured. A new tact will be taken over the summer to speed up the circulation policy changes by focusing on only those changes. Once that is completed, the un-used policies can be removed from the system.   Item categories have turned out to be more difficult than anticipated due to how they are used as facets in the MSC's Enterprise user interface. Work will continue on refining the definitions included in all five of the system's item categories, which will enhance the end user experience and ease concerns about simplifying system policies. Marchwick's initial, detailed analysis of all system policies in use has successfully guided and directed the reorganization effort.

Put together a formal list of current and past directors, and board chairs of public library districts willing to serve as mentors to directors and boards exploring the library district option. Using this list, connect identified mentors and interested directors and board members. Mentoring partnerships have been successful in other areas of library development such as cataloging and we want to see if this approach will aid in the growth of library districts. *(Suzanne Reymer, Lauren McMullen, Pam Henley)*

(Update: June 2015) As a first step, a public library district directors' listserv was created, to encourage the sharing of resources, experiences and expertise. This objective remains in process.

Encourage public libraries to conduct community assessments, articulate specific goals and objectives for outreach programming, and build partnerships with one or more partners in the community, in order to illuminate the role of the public library as a community anchor. To accomplish this objective within a single project in FY15, we will focus on the Maker Space project. We will draft a series of questions that will comprise a community assessment tool for use by those libraries that borrow a Maker Space kit. One aspect will be ways in which members of the community were engaged in presenting maker space programs. Building on this information, hosting libraries will then complete an Outreach Action Plan that outlines plans for structured activities which will make use of the maker kits, and articulates the specific resources (staff time, materials, funding, meeting space, and training) that they and their community partners will contribute toward the implementation of these plans. The Outreach Action Plan will also identify program expectations and desired outcomes (for both libraries and community partners) to be met through these activities. Library staff will be trained in how to use this assessment tool and libraries borrowing the kits will be required to conduct a community assessment using the tool. At the end of the 8 week hosting period, hosting libraries and their community partners will complete an evaluation form for MSL in which they will determine the extent to which they achieved desired outcomes. Evaluation data may be qualitative and based on participant feedback, but will also include program statistics and output data collected by the hosting library. This first effort will inform SLR-LD staff about how we can assist libraries in the future with this kind of assessment. *(Lead staff: Lauren McMullen, Cara Orban)*

(Update: June 2015) Library partnership exchange programs were conducted at Fall Workshops, ASLD/PLD retreat, and the MLA annual conference. In these sessions librarians exchanged ideas, best practices and problem-solving about community partnerships. Strategic planning training that focused on community partnerships was also presented at Darby, Conrad, and in a statewide webinar. Montana public libraries are very engaged with community individuals, organizations and other libraries.

(Update: June 2015) Montana Makers hosting sites are required to identify community partners and available resources in advance of receiving kits, as well as their reasons for wanting to host a makerspace kit. Throughout their time hosting the kits, library staff is encouraged to make use of an evaluation rubric to record the level of engagement, creativity, collaboration, and problem solving skills demonstrated through maker activities. However, this rubric has not been widely adopted. Half of the hosting sites have returned their evaluation documents after returning the kits, identifying successes and challenges as well as statistics (number of makers and programs or activities) and outcomes (learning objectives met, staff lessons learned, and which STEAM disciplines were targeted through the activities).

Orban is developing a survey to gather more information about small library best practices and needs in the areas of community partnerships, content, budget, training, and space planning for makerspace programs. Survey results will be compiled and summarized by August 2015. FY 15 statistics for the Montana Makers pilot include:

- 1,568 participants engaged in both formal and unstructured making activities
- 114 structured programs led by library staff and community partners
- 20 (6 schools and 14 publics) libraries have hosted kits this fiscal year

Skills observed by project leaders engaged in this pilot include:

Improvisation, creativity, conductivity, fractions, hand/eye coordination, colors, problem solving, writing, storytelling, being precise, learning new skills such as sewing and painting, following written/verbal directions, experimenting with media and engineering tasks; how circuits work. Through one component, participants learned about the basics of circuitry through doing hands on exercises. They also learned more about computer programming. These programs were designed to expose students to career possibilities in engineering and computer science and to encourage self-guided discovery.

Partnership opportunities our hosting libraries have identified through the Makers pilot are:

- Public schools or colleges, school clubs like robotics club
- 4-H
- MSU Extension
- Local youth organizations
- Local utilities companies (electricity)/telecommunications company (technology)
- Health clinics
- Artists/craft groups

- Communicate with Montana school administrators about the MSC and school library growth by regular email updates sent through OPI when new school libraries are added to the MSC, attendance at the Montana School Administrators annual conference, a booth at the Montana Education Association's annual conference and by providing talking points to MSC school librarians to share with their local administration. *(Ken Adams)*

(Update: June 2015) Adams attended the MEA conference and has developed and disseminated a brochure describing the MSC for dissemination at conferences and online. Adams includes OPI contacts on emails responding to school librarians inquiring about the MSC and/or interested in joining. Depending on the information requested, some correspondence included cost estimates for joining the MSC.

- Study and evaluate the pros and cons of moving to vendor supplied bibliographic records within the context of MontanaLibrary2Go and the MSC, as opposed to records from WorldCat , so that end users have access to quality metadata that ensures successful search experiences. *(Cara Orban, Ken Adams)*

(Originally Reported April 2015) The MSC Content Management Committee held their annual meeting to discuss and plan major changes in cataloging procedures related to vendor records, RDA requirements and improving the end-user experience. Several sub-committees were formed to accomplish assigned tasks that will lead to updated cataloging procedures and best practices.

(Update: June 2015) Hazen has addressed problems with vendor supplied records in the MSC for MTLib2Go and other sources to ensure record quality and better experience for the end-user. A process has been created and communicated to the MSC membership to deal with the growing number of bibliographic records being supplied for downloadable e-content. Hazen's position focuses on maintaining and ensuring the quality of the bibliographic records in the MSC, a crucial component to the success of the catalog.

Goal Six—Sustainable Success

6. MSL is efficient and effective (measured against partner and patron outcomes) and is engaged in fulfilling its mission.

6.3. Evaluate new and continuing content and services against MSL's mission and long range plan.

6.5 Use Federal Library Services and Technology Act moneys to support new MSL pilots and projects; and support ongoing projects using State funds.

6.7. Foster staff members' value and satisfaction in their achievements and their contributions to MSL's mission.

6.8. Diversify MSL's staff knowledge, skills and abilities.

6.9. Develop the leadership and management skills of MSL staff.

6.11. Provide for an information technology infrastructure which insures industrial strength capacity, and reliability.

SLR Work Objectives:
- Demonstrate leadership in the area of social media by more regularly and consistently communicating our news through Twitter and Facebook. More engagement by SLR-LD staff in using social media will exemplify how libraries can leverage tools like Twitter and Facebook to be more present in their own communities. *(All staff)*

(Update: June 2015) Birnel posts to the Montana Memory Project Facebook and to Twitter daily regarding the MMP. Orban, Flick, Henley, McMullen and Reymer post to the MSL

Facebook on various SLR-LD topics related to statewide projects, training opportunities and library development.

- Come together for a meal when attending Fall Workshop, MLA or other statewide conferences in order to make the most of these opportunities for staff collaboration and troubleshooting. *(All staff)*

- **(Update: June 2015)** This has proven to be a difficult objective to accomplish because the conferences are busy and staff time is very limited.

- Participate in an SLR Division retreat to strengthen communication and understanding of shared goals within SLR. *(All staff)*

(Update: June 2015) An SLR Division retreat was held in October and included three focused activities to promote discussion and planning: 1.) a report on an "SLR Communication Audit" conducted by Lewistown Public Library Director KellyAnne Terry; 2.) table discussions of the strengths and weaknesses of the current SLR organizational structure; 3.) ideas for LSTA pilots, projects and programs. The three outcomes of the retreat were to:
   - Understand our successes and challenges in internal and external communication as a division, and thinking of ways to improve communication where there are challenges

   - Determine the effectiveness and challenges of our current SLR organizational structure as we strive to meet LD and TBL work plan goals and objectives

   - Improve the planning process for LSTA award cycles related to statewide programs, projects, pilots and creating some LSTA ideas for the current and upcoming LSTA awards

Specific accomplishments that are results of the retreat include a future new approach to the Fall Workshops format, planning for an SLR project management tool and a NovelistPLUS subscription for the Talking Book Library.

- CELEBRATE SLR accomplishments to recognize the good work being done on a daily basis. *(All staff)*

(Update: June 2015) This objective continues, as we complete these and other FY 15 tasks and look toward FY 16.