

**USE FOR WRITTEN QUOTES**

**State of Montana  
LIMITED SOLICITATION FORM**

**Montana State Library**

Solicitation Number: **2016\_01**

Solicitation Title: **State Library Strategic Plan Facilitation**

Agency Contact: **Jennie Stapp, State Librarian**

**Limited Solicitation is an informal procurement method for purchases between \$5,001 and \$25,000. This process is authorized by section 18-4-305, MCA, and ARM 2.5.603.**

Company Name: CARSON BLOCK CONSULTING, INC.

Address: 2913 MICHENER CT.  
FORT COLLINS, CO 80526

Phone Number: (970)673-7475 Fax Number: NONE

Federal Tax ID Number: 45-5527654

Responses to this solicitation will be accepted by the Montana State Library via email to [jstapp2@mt.gov](mailto:jstapp2@mt.gov) until **Thursday, March 31 at 5:00 p.m.**

The Montana State Library is an executive branch agency established by 22-1-101, MCA. The State Library is further authorized to give assistance and advice to all tax-supported or public libraries in the state, to provide library services for the blind and for individuals with physical disabilities, and to furnish, by contract or otherwise, library assistance and information services to state officials, state departments, and residents of those parts of the state inadequately serviced by libraries (22-1-103, MCA); to administer the State Depository Program to provide permanent public access to state government information (22-1-212, MCA); to develop a standardized, sustainable method to collect, maintain, and disseminate information in digital formats about the natural and artificial land characteristics of Montana as required under the Montana Land Information Act (90-1-401, MCA); and to establish a planning framework for the implementation of a natural resource information system to include the operations of a natural heritage program (90-15-101, MCA). The State Library consists of two divisions, the Statewide Library Resources Division which supports library development across Montana and operates the Montana Talking Book Library which provides library services to individuals who cannot read traditional print materials; and the Montana State Digital Library which collects, organizes, maintains and disseminates information about Montana state government, and geospatial data, and natural resources information about Montana. These divisions are supported by the Central Services program which manages the administrative, fiscal, human resources, and information technology services of the State Library. State Library employees 44 FTE. Employees include professional librarians, library techs, geographers, information technology professionals and administrative staff. The State Library is governed by a seven-member commission (22-1-101, MCA).

The Montana State Library Commission seeks professional assistance to prepare a strategic business plan. A new strategic plan will replace the existing library long range plan. Preference may be given to respondents who demonstrate experience with, or knowledge about, strategic planning for libraries.

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# Solicitation Number 2016\_01 Montana State Library Strategic Plan Facilitation

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**Carson Block**  
**Carson Block Consulting Inc.**  
2913 Michener Court  
Fort Collins CO 80526  
Federal Tax ID Number: 45-5527654

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## Letter of Interest

Carson Block Consulting Inc. is honored to propose this Limited Solicitation Response for the Montana State Library.

My company specializes in services that are custom-tailored to the needs of the library & communities served, and emphasize positive transformation within people and organizations. This is especially key in strategic planning: no one needs another “to do” list, but instead a deliberate path to the transformation necessary for libraries to remain agile in a changing world.

Although the majority of my direct planning experience is related to library technology efforts (including Pierce County Libraries in Washington, Santa Cruz Public Library, the eiNetwork in Pittsburgh and others), I’ve also been involved as an integrated team member for overall library strategic planning for clients including the Johnson County Libraries (KS), Los Angeles Public Library, and others. I don’t consider technology an end in of itself, but one (albeit important) element of all of the resources libraries should harness to fulfill our missions of public service.

Please see the section entitled “Sample Planning Process” for one example of my approach to strategic planning. I anticipate our process would include three (3) in-person meetings in Helena or alternate location with the rest of our work performed via video/teleconference methods.

In terms of your needs at the Montana State Library, it’s my understanding that I would collaborate with the State Library Commission and staff to create the process, plan framework and other items as specified in the Limited Solicitation Number 2016\_01. As part of that process, I would like to learn the greatest elements of success and challenges in past planning efforts and plan execution to help us build a new plan that makes the best use of your experiences – as well as help us steer around any obstacles that have held you back in the past. As a technologist, I will be especially interested in the data and metrics that you feel are the best measures of your success – whether they be national library efforts (such as Project Outcome and others) or more localized efforts. Many libraries are using data to only look backwards, and I believe we should all transition to using data to anticipate future needs and efforts.

I have a heart for the needs of rural libraries in the US, and in my work as an independent consultant I have struck a balance between working with the largest

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and smallest libraries in the country. I started my consulting career as a staff technology consultant (working for a regional system in Colorado) and have a deep understanding of the challenges faced by a State Library balancing the needs of several larger anchor libraries – and many smaller libraries separated by distances. As well as recent large clients (including Pittsburgh PA; the RAILS system in IL; and the Central Arkansas Library System in Little Rock) I’m also working with small libraries or agencies serving small libraries (including the Texas State Libraries and Archives commission for rural technology training; the Delaware Division of Libraries; a project with Internet2 called “Toward Gigabit Libraries” to create a connectivity toolkit and solutions for rural and tribal libraries; and individual clients such as Red Feather Lakes CO, Gloversville NY and Seguin TX).

With 21 years of library technology experience and clients from coast to coast, Carson Block Consulting Inc. brings you current and caring expertise. I greatly look forward to the opportunity to help, and welcome any questions you might have.

Thank you!

The point of contact for this bid is:  
Carson Block  
2913 Michener Court  
Fort Collins, CO 80526  
Voice: (970) 673-7475  
Fax: (970) 266-0818  
Email: [librarylandtech@gmail.com](mailto:librarylandtech@gmail.com)  
Web: <http://www.carsonblock.com>

### **Quote**

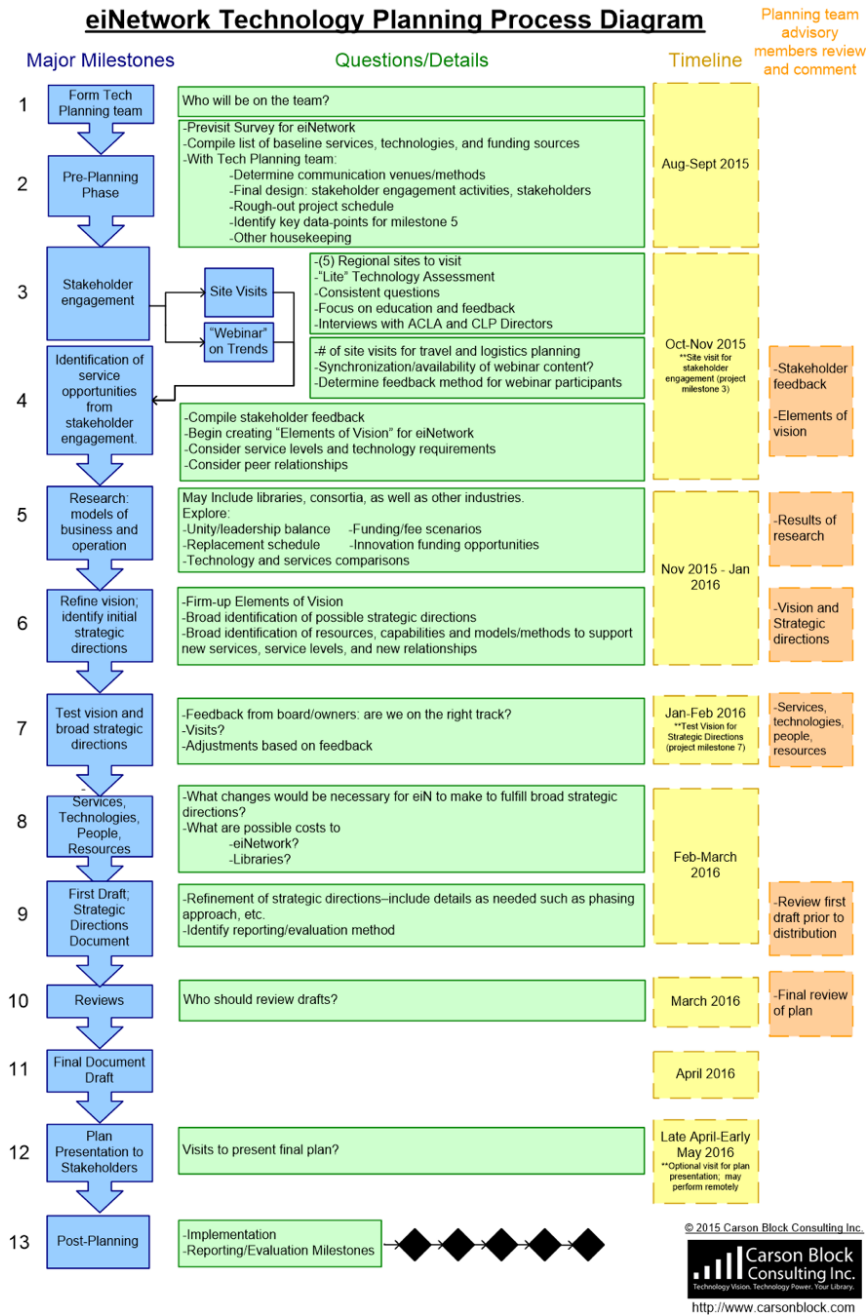
Fees for this bid are \$24,750.00 and includes travel expenses for three visits to the Montana State Library in Helena, MT (or other appropriate location) to perform the work.

The consultant’s rate is \$200/hour.

## Sample Planning Process

This graphic shows a **sample** planning process for a current client. The consultant will work with the Montana State Library to create a process customized to its unique needs.

**eiNetwork Technology Planning Process Diagram**



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## References

(Additional/More Specific References are available upon request)

**Anne E.C. Norman, Director / State Librarian**  
**Delaware Division of Libraries / State Library**  
43 S DuPont Hwy Dover DE 19901  
302-739-4748 / fax 302-739-6787  
[annie.norman@state.de.us](mailto:annie.norman@state.de.us)

**Sharon Morris**  
**Director, Library Development**  
**Colorado State Library**  
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201 East Colfax Avenue, Room 309, Denver, CO 80203  
[Morris S@cde.state.co.us](mailto:Morris_S@cde.state.co.us) | [www.cde.state.co.us](http://www.cde.state.co.us)

**Sara Dallas**  
**Director, Southern Adirondack Library System**  
22 Whitney Place  
Saratoga Springs, NY 12866  
ph: 518-584-7300 ext 205  
[sdallas@sals.edu](mailto:sdallas@sals.edu)

## Profile

### Business Background and Qualifications

Carson Block Consulting Inc. is a full-service library technology-consulting firm established as Carson Block LLC in 2010, and incorporated as Carson Block Consulting Inc. in 2012. Primary areas of consulting including library technology planning; facilities and services master planning; IT Department audits, assessments, and improvement plans; and teaching, training, facilitation and public speaking on library technology and general library advocacy topics.

### Personnel

Carson Block is the company principal and will perform the work proposed in this bid.

### Brief Bio:

Carson Block has led, managed and supported library technology efforts for more than 20 years. He has been called “a geek who speaks English” and enjoys acting as a bridge between the worlds of librarians and hard-core technologists. He has a passion for demystifying technology for the uninitiated, and help IT professionals understand and support the goals of libraries.



Recent projects include technology planning in Anchorage AK, Tacoma WA, Santa Cruz CA, Los Angeles CA and the Delaware Division of Libraries, facilities master planning in Texas, New Mexico, New York, Alaska and more; library technology architectural programming and budgeting for new library construction; facilities master planning; analysis of IT structure and staffing; IT staff search services; and more.

Carson is an energetic and engaging facilitator, and is a frequent speaker at library events and beyond – including bringing messages of library advocacy to South by Southwest Interactive (SXSWi) In 2012-2015 (covered by Time magazine at <http://techland.time.com/2012/03/11/sxsw-the-fate-of-libraries/>).

Carson is past chair of the Colorado division of the Public Library Association and ALA's Library Consultant's Interest Group (a division of ASCLA). Currently he is a member of ALA's 21st Century Libraries Committee (established by the Office of



Information Technology Policy) and the ringmeister of a group called lib\*interactive that invades the SXSW conference annually for the good of all libraries.

### Longer Bio:

#### *About Carson*

Carson Block has led, managed, and supported library technology efforts for more than 20 years. His efforts at his first library position at the Loveland, Colorado Public Library (beginning in 1994) resulted in the first broadband Internet connection and public access computers for the library. The line was also the first major Internet connection for the city government complex of Loveland!

Carson brings a user-centered technological perspective, with an emphasis on solutions that are both transparent and powerful, with some “gee whiz” thrown into the mix. Carson Block has been called “a geek who speaks English” and enjoys acting as a bridge between the worlds of librarians and hard-core technologists. He has a passion to de-mystify technology for the uninitiated, and to help IT professionals understand and support the goals of libraries.

Carson’s passions include leading technology visioning and planning, creating highly-functional work groups, technical design (including infrastructure, RFID, points of self-service, and more), and project management with a focus on technology solutions that powerfully serve the impacts each library has in the community it serves.

Current consulting projects include library construction projects; technology program planning and budgeting; facilities master planning; IT department gap analysis; executive coaching; IT Manager search services; workshops for organizational technology visioning; and more. Carson is also teaching a library technology management class accredited by the American Library Association. Carson is an energetic and engaging facilitator, and is a frequent speaker at library conferences. Current presentations include a 2012 [solo panel](#) at South by Southwest Interactive (SXSW) (covered by Time magazine [here](#)); a series of eBook webinars for the Public Library Association, and an American Library Association-accredited class on Technology Management for library administrators. Other presentations include RFID; security best practices; project management, and library technology management issues including leadership and technology planning.

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As a staff technology consultant for a regional Library Service System in Colorado, Carson worked with public, school, academic, and special libraries of all sizes on a wide variety of efforts ranging from direct technology support to large-scale projects, and was co-director of a statewide, LSTA grant-funded project to automate a consortium of 40 small and mid-sized libraries throughout the state. The project involved securing reliable connectivity, retro-conversion, ILS and database configuration, and support.

Carson served in multiple capacities as a consultant to the Colorado State Library. His consultation with the State Library began with helping libraries understand and comply with the Children's Internet Protection Act through an informational Web site and public speaking. He has also contributed library technology standards established by the Colorado State Library, and digitization best practices for the Collaborative Digitization Program. Most recently, Carson began on a BTOP-funded network assessment project through the State Library, taking him to 11 libraries in rural Colorado to develop recommendations tailored to each library's unique broadband and networking needs.

In his role as IT Director for the Poudre River Public Library District, Carson managed multiple technology projects and project teams (including network infrastructure overhauls, a comprehensive conversion to RFID, creation of patron self-service kiosks, and technology design and project management for new library construction projects (including the first LEED platinum for interior and second platinum LEED library in the nation), and contributed to the successful effort to form a library district. He led the District's mobile strategy and studied automated materials handling (AMH) systems. Carson also co-chaired a committee with Colorado State University concerning eBooks and eReaders.

Carson is past chair of the Colorado division of the Public Library Association and ALA's Library Consultant's Interest Group (a division of ASCLA). Currently he is a member of ALA's 21st Century Libraries Committee (established by the Office of Information Technology Policy) and the ringmeister of a group called lib\*interactive that invades the SXSW conference annually for the good of all libraries.

## Clients and Organizations Served

### Facilities Master Planning

- |                                    |                    |
|------------------------------------|--------------------|
| • Johnson County Libraries         | Johnson County, KS |
| • Anchorage Public Library         | Anchorage, AK      |
| • New Braunfels Public Library     | New Braunfels, TX  |
| • Round Rock Public Library        | Round Rock, TX     |
| • Seguin Public Library            | Seguin, TX         |
| • Lyons Public Library             | Lyons, CO          |
| • Poudre River Public Lib District | Ft. Collins, CO    |

### Facilities Design

- |  |                  |
|--|------------------|
| • Poudre River Public Library District | Fort Collins, CO |
| • Rt. 9 Library                        | Wilmington, DE   |
| • Dayton Metro Libraries               | Dayton OH        |
| • Seguin Public Library                | Seguin, TX       |
| • Gloversville Public Library          | Gloversville, NY |
| • Hewitt Public Library                | Hewitt, TX       |

### Technology Planning

- |                                    |                 |
|------------------------------------|-----------------|
| • Central Arkansas Library System  | Little Rock, AR |
| • Tacoma Public Library            | Tacoma, WA      |
| • Anchorage Public Library         | Anchorage, AK   |
| • Pierce County Libraries          | Tacoma, WA      |
| • Santa Cruz Public Library        | Santa Cruz, CA  |
| • Delaware Department of Libraries | Dover, DE       |
| • Poudre River Public Lib District | Ft. Collins, CO |

### Strategic Planning

- |   |                    |
|---|--------------------|
| • eiNetwork                             | Pittsburgh, PA     |
| • Johnson County Libraries              | Johnson County, KS |
| • Los Angeles Public Library            | Los Angeles, CA    |
| • Muskingum County Libraries            | Zanesville, OH     |
| • Iowa City Public Library              | Iowa City, IA      |
| • Provo City Library (for Google Fiber) | Provo, UT          |
| • Vigo County Libraries                 | Terra Haute, IN    |

### New Public Service Model Design

- |  |               |
|--|---------------|
| • Oakland Public Library               | Oakland, CA   |
| • Flathead County Libraries (workshop) | Kalispell, MT |



**Technology Design for Library Construction and Remodeling**

- Dayton Metro Libraries Dayton, OH
- Route 9 Library Wilmington, DE
- Seguin Public Library Seguin, TX
- Artesia Public Library Artesia, NM
- Larry J. Ringer Library College Station, TX

**Technology Assessment/Documentation for Construction Projects**

- Route 9 Library Wilmington, DE
- Hewitt Public Library Hewitt, TX
- Seguin Public Library Seguin, TX
- Claverack Public Library Claverack, NY
- Cairo Public Library Cairo, NY
- Artesia Public Library Artesia, NM
- Poudre River Public Lib District Ft. Collins, CO

**Analysis for Technology**

- Tacoma Public Library Tacoma, WA
- Iowa City Public Library Iowa City, IA
- Muskingum County Libraries Zanesville, OH
- Dayton Metro Libraries Dayton, OH
- Denver Public Library Denver, CO
- Pierce County Libraries Tacoma, WA
- Davies Public Library Owensboro, KY
- East Bonner Library District Sand Point, ID
- Broomfield Public Library Broomfield, CO
- Front Range Community College Library Westminster, CO
- Sterling Public Library Sterling, CO
- Clearview Library District Windsor, CO
- Red Feather Lakes Public Library Red Feather Lakes, CO
- Lyons Public Library Lyons, CO
- Bucks County Free Library Assoc. Doylestown, PA

**Library IT Staffing – Position Design & Recruitment**

- Cooperative Computer Services Chicago, IL
- Houston Public Library Houston, TX
- Bucks County Free Library Assoc. Doylestown, PA
- Toledo-Lucas County Library Toledo, OH



- Tacoma Public Library Tacoma, WA
- Pierce County Libraries Pierce County, WA
- Anchorage Public Library Anchorage, AK

### **Workflow Assessments**

- Poudre River Public Library District (AMH) Fort Collins, CO
- Dayton Metro Libraries (AMH, Courier & Tech Svs) Dayton, OH

### **RFID**

- Poudre River Public Library District Fort Collins, CO
- Artesia Public Library Artesia, NM

### **ILS - Selection and Consortiums**

- Artesia Public Library (ILS Selection) Artesia, NM
- SALS and MVLS Consortium (Fees discussion) New York

### **Analysis for Library E-Book Publishing Models**

- DAZL-Digital Arizona Library State of Arizona Phoenix, AZ
- Advisor for private e-publishing firm Montreal, Canada

### **Infrastructure Assessments & Recommendations**

(BTOP Grant via CO State Library – Colorado 2013)

- 11 libraries throughout the state of Colorado.

### **LSTA (Library Services Technology Act) Grant Evaluation**

- State of Oklahoma Woodward & Oklahoma City, OK

### **Technology Visioning**

- Provo City Library (for Google Fiber Project) Provo, UT
- Hatch Public Library Mauston WI
- SALS Southern Adirondack Library System Saratoga Springs, NY
- SMRLA Southern Maryland Library Association Waldorf, ME
- ...and all tech planning & master planning clients (please see above)

### **Cultural Heritage/Digitization Projects – Assessment and Technology Strategy**

- Boulder Public Library Boulder, CO
- Maine Memory Network Portland, ME
- New Hampshire Historical Society Concord, NH



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**Teaching**

- Management of Technology - Certified Public Library Administrator Program ALA (National Class)
- You Can Do I.T. - Networks TX (16 sites)
- You Can Do I.T. - Hardware & Software TX (12 sites)

**Keynotes/Presentations/Advocacy speaking**

- Digital Public Library of America (DPLA) Washington DC
- LITA National Forum (Keynote) Minneapolis, MN
- American Library Association San Francisco, CA
  - LITA Top Tech Trends
  - SXSW and Libraries
- LACONI Chicago, IL
- Texas Library Association Conference Austin, TX
- Library Futures Los Angeles County Libraries, CA
- Make Your Own Makerspace (National) - Demco
- Library IT Disaster Planning & Preparedness Columbia, MO (3-day workshop)
- Speaker: Library Journal Design Institute Seattle 2013
- NYLA New York Library Association Saratoga Springs, NY
- UT State Library – Social Media Series Salt Lake City, UT
- WILS Wisconsin Library System Madison, WI
- SXSW (2012, 2013, 2015, 2016) Austin, TX
- INCOL Inland Northwest Council of Libraries Spokane, WA
- CLiC Colorado Library Consortium Grand Junction, Ft. Morgan, Pueblo
- Marmot Library Network Grand Junction, CO
- Aurora Public Library Aurora, CO
- Jefferson County Public Library Golden, CO
- New Castle Libraries New Castle, DE
- Cedar Rapid Public Library Cedar Rapid, IA
- Colorado State University Housing IT Dept. Ft. Collins, CO
- Frequent speaker annually at conferences:
  - CAL Colorado Association of Libraries
  - ALA American Library Association
  - PLA Public Library Association

DPLA: Member, Audience and Participation workstream:

- Digital Public Library of America Chicago, Boston, NYC

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CoPLA Colorado Public Library Association	President 2011-2012 Past president 2013
ALA ASCLA: Library Consultant's Interest Group	LCIG Chair Elect - Chair (2013 - 2015) Coordinator, Consultant's Giving Back (2013 - present)
Advisory Committee: Center for the Future of Libraries	Member (2015-present)
21 <sup>st</sup> Century Libraries Committee	(2013 - present) American Library Association's Office of Information Technology Policy (ALA OITP)
Organizer: lib*interactive (formerly #sxswLAM)	Library Impact group participating at the annual SXSW Interactive conference in Austin, TX

**Writing**

- Appendix to Start a Revolution: Stop Acting Like a Library (Bizzle/Flora; ALA Editions, 2015)
- Reviewer for Video Librarian Magazine since 1998
- Articles for American Libraries Magazine
- Articles on technology strategy, workflow mapping and professional development for Strategic Libraries newsletter, Library Resources Group.