Montana State Library
Statewide Library Resources – Library Development Work Plan
January – June 2018

Green (no font distinction) – activity progressing as expected.
Yellow (italicized) – activity may be delayed but the delays do not necessarily rise to the level of Commission concern
Red (bolded) – activity is delayed and Commission attention is warranted
Blue (underlined) – addition or change to the original work plan.

Strategic Framework – Foster Partnerships

Activities:

- Development of an informational packet/website for new and joining Montana Shared Catalog directors.
  - Note: The MSC Trainer's last day in the office will be August 11, 2017. Due to her departure, this project will be placed on hold until a new trainer is hired and ready to implement this project.

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

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

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

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

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

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

Inputs	Outputs	Outcomes	Impacts
Jo Flick and Pam Henley – time writing scripts and producing tutorials	10-15 tutorial segments – OUTLINED – one pilot created in Adobe Articulate-Storyline; assessment underway; may decide to use Camtassia instead.	New Directors complete series so they understand critical need-to-know MT-specific information within the first few weeks on the job	Communities will have excellent library service with no disruption during leadership transition
Adobe license Camtassia licences	Data: # of new directors completing series, # of times each segment is accessed, # of initial consultant visits where time is spent on other issues	New Directors will understand their new role better, feel more confident, know where to find critical information so they are not overwhelmed and are more likely to stay	Library directors become engaged and active in MT library community, leading to thriving libraries in local communities
Server space to host	No solution determined yet; assessment of Camtassia as an authoring software may provide an easier solution.	New Directors will know where to reference MT-specific information to avoid confusion and missed opportunities	Library directors who manage library resources efficiently (lean management) (LDSTF)

- Create civil engagement "program-in-a box"
  - Note: The Lifelong Learning Librarian's last day in office is August 18, 2017. Due to her departure, this project is on hold. Lauren McMullen will continue to follow-up on some work that has already started, but major work in this area will not occur until after a new lifelong learning librarian is hired.

Inputs	Outputs	Outcomes	Impacts
Time of Sara Groves and Lauren McMullen	Civil engagement "program-in-a-box" Needs assessment survey open to librarians. Contact with possible presenter for first program (fall 2017).	Citizens learn from exchanging different points of views	Libraries are leaders in creating thriving communities (LDSTF)
Nationwide models/research for civil engagement programs	Library usage of the program Inventory and analysis of program models from other library systems.	Citizens feel more connected, have a greater sense of belonging in community	Communities are safe, peaceful, thriving
Materials	Data gathering, stakeholder and partner identification/analysis, outcomes desired are in progress	Citizens become more involved in community life.	Lifelong learning that supports community engagement inside and outside the library, fostering engagement in the world and empowering an informed citizenry. (LDSTF)
		Communities turn to the library when civic issues arise	

- Increase in outreach efforts for the Montana Memory Project.
  - NOTE: this project will disappear from the October work plan report. Due to logistical issues, the budget cuts and their impact on the Montana Memory Project, we have decided to cancel this project. We will review it next year, but at this time Jennifer will focus her time and energy on the

Montana Memory Project interface in order to position the MMP to survive the loss of the State Library's dedicated web developer.

Inputs	Outputs	Outcomes	Impacts
Time of Jennifer Birnel	Demonstrate use of the MMP and share content	Montanans become aware of the MMP and learn how to use it as a research resource and for pleasure	Montanans feel a sense of connection to their community
Time of Museum and Library Directors Cathy Brandvold – July 22 Jamie Grecko - ? Michelle Fenger - ?	Share information about their institution	Montanans become more aware of local libraries and museums and the services they offer	Montanans value and support making heritage materials accessible
Time of Volunteers	Number of fairs attended Marias Fair – Shelby July 20-23	Montanans learn how to find historical and genealogical information of value to them	More interest may lead to more digital collections being added to the MMP
Booth rental fees Marias Fair booth = $100.00	Number of people who stop by the booth	Montanans become more aware of volunteer opportunities	Montanans value the preservation of heritage materials
Supplies & equipment for the booth (inc. technology)	Number of website demonstrations	Montanans learn about their community/region's history	More Montanans choose to volunteer at local libraries and museums
Marketing materials	Number of marketing items distributed		Montanans gain sense of self through historical content from their family/community/region/state

			Lifelong learning that supports community engagement inside and outside the library, fostering engagement in the world and empowering an informed citizenry. (LDSTF)

- Improve the existing Montana Memory Project user interface so that it works well with all device types and is easy for all user types (addressing issues of accessibility) to find the content they seek.

Inputs	Outputs	Outcomes	Impacts
Contact CONTENTdm (CDM) to initiate the switch to responsive design	Path for how to switch to new design CDM viewer that works better on phones and tablets		More users make use of the MMP for research and pleasure
Based on input of MMP partners, offer design suggestions to CDM to improve the usability of the design.	CDM will modify the design for a better user experience	MMP users find what they are seeking on the webpages with greater ease and less frustration More positive feelings toward the MMP and the use of the website	
Work with Tom to make the switch to the new responsive design	New Access database for use with the existing Content Management system with links to the new responsive CDM pages Better website viewing on all device types	Users who need accessible websites are able to use the MMP to find information they need Less work for MSL IT staff in the immediate future.	

	Better function for all types of accessibility issues Better search results	Improved usability of the MMP for end users	
Learn how to implement latitude and longitude for geographic locations	Ability to create maps within CDM and ability for DPLA to use data in their API. Also potential to create story maps with MSL GIS. New interactive map for users of MMP content to explore Ability to search by locations within the state. Ability to see at a glance where content is from	Users are able to use an interactive map to find MMP content	Potential to tell stories with the content based on place

- Engage Montana library community in identifying how federations can help implement the Library Development Task Force Recommendations

Inputs	Outputs	Outcomes	Impacts
Time of Tracy Cook and Jennie Stapp	Task force to review federations	MSL staff understand the value of the federation model to librarians.	Librarians are leaders in creating thriving communities (LDSTF)
Time of participants	Recommendations that identify how federations can help with library development		Collaboration that creates a shared resource platform that libraries contribute to in

			order to help address specific needs. (LDSTF)
	All 6 federations have created a theory of change for their various programs. The outcomes identified will be used by the coordinators to develop a new model for the plan of service and annual report.	Federation member libraries can report the outcomes that federation funding achieves.	

Strategic Framework – Secure sufficient and sustainable funding

Activities:
- Develop models of cooperation for libraries

Inputs	Outputs	Outcomes	Impacts
Time of Lauren McMullen	Develop a publication describing different economic/governance models for public libraries.	Library directors and board members learn about different economic models.	
Research material from other states (COMPLETED)	Library directors and board members use this publication	Libraries use this information to evaluate and improve their governance structures (LDSTF)	

- Help librarians and board members develop the skills and confidence to seek additional funds for the library.

Inputs	Outputs	Outcomes	Impacts
Time of Tracy Cook	Develop or share resources about seeking additional funds	Library directors and board members understand their role and how to plan for and seek increased funding from a variety of sources	Libraries receive more funding – either receiving grants or increasing their overall budgets
Tracy Cook attended a training session about "Making the Case". She will use that information to develop resources/training for libraries.	Develop trainings about seeking additional funds	Librarians and trustees are listening to their community and thinking creatively about services and resources that would gain/secure funding	Librarians and trustees are more creative in the use of the funding so the library has more resources or more collaboration
		Librarians and trustees understand what people think the library does and where the funding goes	Libraries are leaders in creating thriving communities (LDSTF)
		Librarians and trustees are proactive in articulating their value and securing funding rather than reacting to possible cuts	Governance and funding is supported through librarians and boards that aren't afraid to ask for the resources they need and who seek creative sources of funding. (LDSTF)

Strategic Framework – Create a useful information infrastructure

Activities:

- Increase the bandwidth for libraries who are currently participating in e-rate.

Inputs	Outputs	Outcomes	Impacts
Time of Suzanne Reymer	# of libraries who participate in project	Participating libraries start moving towards national goals for bandwidth	Public access technology that supports technology, digital literacy and digital inclusion (LDSTF)
Time of participants	How much bandwidth is increased	Library users can do online learning, job skills/interviews, communicate with others, gaming video	Library users obtain degrees; jobs; and/or new job skills
Data from USAC	Dollars from program	Library users report increased satisfaction with new Internet speeds	
Data from libraries who increased their bandwidth	Report outlining e-rate filing – what did people report	MSL staff identify libraries who may be willing to file for increased bandwidth	
	Information from libraries with higher bandwidth speed	MSL staff increase their knowledge about how higher bandwidth benefits libraries and communities	

- Evaluate the OCLC Group Services Contract

Inputs	Outputs	Outcomes	Impacts
Time of Cara Orban and Tracy Cook	Recommendations for the OCLC Group Services Contract	Identify whether or not OCLC is essential for libraries	Libraries save money that can be used for other services.

			Patrons continue to have as much access as possible to materials they need for education and entertainment
Time of Network Advisory Council Work Group	Cara Orban – analyzed OCLC usage - COMPLETED	Identify what value OCLC adds for libraries and patrons	
Data from OCLC	Jennie Stapp, Cara Orban, and Tracy Cook met with OCLC representatives to discuss contract options - COMPLETED	If we determine that OCLC is non-essential for a certain type and/or size of library, identify how to maintain the affordability of the contract for those libraries who wish to continue using OCLC products.	Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)
Data from libraries			Library infrastructure that encourages consortial resource sharing to make information resources, technology and service delivery more efficient, effective, affordable, customizable, sustainable, scalable (LDSTF)

- Develop a centralized acquisitions pilot project

Inputs	Outputs	Outcomes	Impacts
Data from libraries: Amount of money currently used for materials purchasing and staff processing time	Acquisitions module configured for staff	Library directors and staff learn about the value of centralized acquisitions.	Montana libraries are more innovative
Data from MSC staff: Amount of time MSC staff spend	Tracking of purchasing [built into Acquisitions module]	Directors and staff working together to find meaningful ways to repurpose staff	Montana library users have access to a wider variety of materials and services

maintaining/building current non-centralized acquisitions			
Data from other Centralized Acq consortia: Volume of participants to allow for cost breaks from the vendor	Accounting of staff time - new projects made possible because of money or time	Centralized acquisitions creates a better MSC system.	Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)
Time of Jemma Hazen and staff coordinating MSC libraries and negotiating contracts	Demonstrated cost savings to participating libraries	MSL Staff learn whether or not Centralized Acquisitions has value for more libraries beyond the pilot	Library infrastructure that encourages consortial resource sharing to make information resources, technology and service delivery more efficient, effective, affordable, customizable, sustainable, scalable (LDSTF)
Time of Central Services?	Demonstrated cost savings to participating libraries		
Tracy Cook attended a meeting with the Procurement Office to determine what is required for a contract with multiple vendors.	Tracy Cook and Jemma Hazen outlined a plan for implementing the project. Libraries have been invited to participate.		
	We have established a pilot group who met in June. There are members of the group who wish to explore cooperative		

	collection development. In the fall, Jemma will interview libraries to begin process of suggesting a standard procedure for pre-processing and non pre-processing libraries who use acquisitions.		

- Provide leadership training for libraries –Summer Library Leadership Institute

Inputs	Outputs	Outcomes	Impacts
facilitator team (honorarium & travel stipend)	6-10 online meetings with facilitators , 1 face2face meeting in Billings; facilitators present most of activities at the retreat, assist MSL staff with follow-up, & as mentors for SLLI participants	Participants RECOGNIZE THEIR OWN LEADERSHIP STYLE as well as the benefits & challenges of their style, so that they can participate more productively in management teams & to effect positive change in their library & community.	Positive change at the participant's library contributing to a thriving community .
pre-conference assignments: focused on the basic philosophy of leadership & the difference between leading & managing	Participants spend 10-20 hours with assigned reading, viewing, & reflection based on assignments planned by the facilitator team.	Participants DEVELOP LISTENING & COMMUNICATION SKILLS so that they are able to INSPIRE OTHERS & collaborate toward a shared vision. Pre- and post self-assessments will measure this.	The library's shared vision is realized & the library is able to fulfill its mission.
Retreat July 26-29	camp-like atmosphere at a secluded & private location, 4 days of activities,	Participants will be CONFIDENT TO TAKE RISKS & to create an environment that is resilient in failure	Library programs & partnerships are

	presentations, discussions – June 26-29	so that libraries & librarians are positive innovators in their communities.	productive & contribute to a thriving community.
journals & other materials & supplies	Participants reflect on their learning & use their reflections to make mid-course corrections & plan future actions. The journal provides a long-term resource to the learner & a way for them to chart their progress.	Participants PROPOSE & DEVELOP A COMPLEX & CHALLENGING PROJECT using productive strategies for managing change.	The library takes on the worst community problems with successful library programs
follow-up webinars & face2face meetings	MSL staff & facilitators, as well as peers, provide continued support, as participants transfer their new knowledge to a real-life project at their library.	Participants PURSUE THEIR OWN LEADERSHIP DEVELOPMENT to try new things, grow, to evaluate their efforts, to view hardship, failure, or fear as catalyst for positive change in their own lives, their libraries & communities. Six attendees from 2015 are attending additional training (some supported by MSL grants) or seeking leadership positions in professional organizations.	Participants are more confident, able to persevere, have increased status in their communities, state & nation, & other people rally around them.
report to the MT State Library Commission - MLA 2018	Participants plan & deliver their reports in a format they design. Some attend the meeting to answer questions & present their work.		

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

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