

The Montana Shared Catalog: Fiscal Background and Current Organization  
Talking Points for Fall, 2014 Membership Meeting

- The Montana Shared Catalog is a statewide project of the Montana State Library. It is a voluntary, library consortium currently consisting of 169 libraries and library branches. Member libraries share a single Integrated Library System (ILS) which is currently the SirsiDynix Symphony system.
- The MSC was created by the State Library in 2002 with the participation and financial commitment from 17 initial, multi-type libraries. A cost share formula was created that determined the amount each of the first 17 libraries would pay and that would enable all types and sizes of libraries to join the MSC in the future. Federal Library Service and Technology Act (LSTA) monies were approved by the State Library Commission to assist new libraries with the costs of migrating to the new catalog.
- From 2002-2007, the Missoula Public Library served as the fiscal agent for the consortium, working with the State Library to invoice libraries, receive LSTA funding and pay invoices.
- By 2007, the consortium had grown to more than 80 libraries. The MSC budget was in good shape, but the membership had built up a fairly large, unexpended reserve fund for future purchases and this fund raised auditing concerns for the MSL Commission and the MSC Executive Committee. Additionally, the size of the growing project led the State Library and the Missoula Public Library to consider the need to bring the fiscal management under the State Library.
- Discussions took place between MSL and the MSC membership analyzing options for future fiscal management. The MSC briefly considered the pros and cons of becoming an independent non-profit organization, without ties to the State Library as a continuing statewide State Library project. The costs to the membership would have increased considerably, covering all of the administration and technical support as well as hardware related costs. There was some concern that bringing the fiscal management under the State Library meant that the funding would become part of the State Library's budget and reported each legislative session. However, the MSC membership contributions would be designated as a proprietary fund in that budget, further clarifying the source and use of these monies. The membership voted in 2007 to move the fiscal management of the Montana Shared Catalog under the State Library.
- In 2011, State general fund monies that had previously been allocated to individual reimbursements to libraries for interlibrary loan costs were repurposed through an administrative rules hearing process and designated as "resource sharing funds". These funds are now applied evenly to the costs of the statewide OCLC Group Services contract and the operational costs of the Shared Catalog, lowering OCLC enrollment fees for all libraries and membership costs for the Montana Shared Catalog.
- Member libraries are invoiced annually by the State Library based on the cost share formula approved by the membership. The State Library pays all of the invoices related to the Shared

Catalog, through a combination of Federal Library Service and Technology Act monies, State funding and the MSC membership costs.

- The State Library now covers the costs of two and 1/3 staff FTE. The MSC membership covers that cost of two and 2/3 staff FTE. All of these staff are employed by the State Library and supervised by State Library personnel. These positions provide overall management and technical support to the staff of existing and incoming Montana Shared Catalog libraries.
- There are currently 66 public school libraries in the Montana Shared Catalog along with 6 academic libraries, 82 public libraries, and 12 special (law, medical, government, and museum) libraries.
- MSC members are found in 92 Montana communities serving a combined population of over 500,000 Montanans.
- The Montana State Library continues to provide administrative, technical and financial support to the MSC. It is considered a major ongoing statewide program, designated as such by the Networking Advisory Council and approved by the State Library Commission.