

**Montana State Library**  
**LSTA Five-Year Plan 2008-2012**  
**Final (approved by IMLS 10/1/07)**

**Overview**

Montana State Library (MSL) was required by the State of Montana to produce a new agency-wide strategic plan for the period 2006-2011 (available at the MSL Web site: <http://msl.mt.gov/admin/StrategicPlan0611.pdf>). The process for developing this plan began in fall 2005. Needs assessment data was collected through numerous focus groups, discussion at ten federation meetings, the 2006 Montana Library Association conference, five State Library Commission meetings, and a four-day 'listening' tour through Eastern Montana. The draft of the plan was available online for six months in 2006 and librarians, trustees and others were encouraged to review the document and make comments.

During the strategic planning process, MSL queried librarians, trustees and library users about what was needed to improve library service in Montana. Below is the list of fifteen programs, projects, and products that were repeatedly mentioned (on at least three separate occasions) in the focus groups, listening tour, and online comments:

1. Content & Access
  - databases
  - more statewide contracts and resources
  - virtual reference services
  - digitization of special treasures held by local libraries
  - thin-client products provided for all libraries
  
2. Leadership, Training & Consultation
  - leadership
  - training/education (including locally presented, online, and distance)
  - statewide consulting librarians
  - free on-call technology support for all libraries
  - assistance with advocacy, marketing, and public relations
  
3. Partnerships & Collaboration
  - partnership development with many groups
  - delivery system for interlibrary loans and other resources
  - more cooperative programming
  - cooperative collection development
  - rotating shared collections of special materials (large print, audio books)

This list presents three of the four identified needs that Montana State Library will address during the next five years using LSTA funds. The fourth need is expanding services to patrons with visual, physical, or reading disabilities.

For the IMLS-required LSTA Five-Year Plan 2008-2012, MSL has included data from the 2005-2006 planning process as well as from the 2007 LSTA evaluation report prepared by Deborah Johnson, Johnson and Johnson Consultants, of Waunakee, Wisconsin.

## **Mission**

The Montana State Library meets the information needs of Montana government agency management and staff, ensures all Montana citizens have access to information created by their government, supports the role of all Montana libraries in delivering quality library content and services to their patrons, works to strengthen local community public libraries, ensures that Montanans who are visually or physically handicapped are provided access to library resources, and measures its successes by its patrons' and partners' successes.

### **NEED #1: All Montanans deserve convenient, high-quality and cost-effective access to relevant quality content to meet their information needs.**

**Summary Needs Assessment:** In 2007, librarians across the state were asked, "What do you see as the role of the Montana State Library?" Thirty-five percent of the 343 responses mentioned activities related to Need #1: "MSL should continue to help libraries to offer as many services as possible; the statewide site licenses for OCLC services and InfoTrac are awesome!"; "support the various types of libraries in the state by making available resources that not every library can afford"; "offer statewide subscription services that benefit every library"; "free access to information for all people in Montana"; "provide as much valuable information as possible to the public in as many media forms as possible"; "negotiate for statewide contracts and services"; "let us stretch our dollars as far as we can with excellent databases and add to them if possible"; "allow universal searching access to materials statewide"; "help the libraries by keeping the cost of OCLC down"; "coordinate cooperative purchases to provide access to electronic resources to all state residents"; and "support and promote the development and growth of high quality information services on an equitable basis statewide".

When asked to evaluate specific statewide content (InfoTrac, auto repair manuals, Ask a Librarian) and access tools (WorldCat, ILL, MLNCAT, etc.), an average of 57% of respondents indicated that these products were used in their libraries. Collectively, these products were rated as valuable by 82% of respondents. Within this group, the products were rated as "essential" by 30%, "very valuable" by 22 %, and "valuable" by 30%.

The Network Advisory Council (NAC), whose members represent all types, sizes, and geographical locations of libraries, makes recommendations to the State Librarian on planning for technology and priorities for statewide projects. In 2006, the NAC's recommendations included seeking legislative funding for the

statewide periodical database and OCLC contracts so all libraries can utilize these products at no additional cost; implementing a full “request for proposal” process to secure the best possible statewide periodical database and to increase content that is provided through this contract; and exploring the possibility of a statewide downloadable audio books contract.

**Goal:** Improve quantity and quality of information available by providing libraries with affordable electronic databases and make access to library materials convenient and efficient with self-service capabilities so that the information needs of all Montana residents are met.

**LSTA Purpose:** Developing library services that provide all users access to information through local, state, regional, national, and international electronic networks and targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line.

**Key Output Targets:**

- \*By July 2009 at least one new content product will be reviewed and selected and a statewide contract negotiated for purchase.
- \*Ten libraries will add Montana-related digital content to statewide digital projects such as the Cooperative Digital Project by December 2010.
- \*Use of Montana’s online 24/7 virtual reference services by Montana citizens will increase 25% by December 2010.
- \*At least 50% of libraries will use the statewide periodical database at least once by October 2009.
- \* There will be a 15% increase annually in the instances in which library patrons utilize the self-service capabilities of the Montana Shared Catalog.

**Key Outcome Targets:**

- \*70% of library patrons randomly surveyed in January 2009 will rate the statewide periodical database available at or through their local library as “valuable” or higher.
- \*50% of library patrons responding to an annual survey about their Ask a Librarian use will report that the service is helpful.

**Program:**

1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. Promote products and expand use in school libraries. *Timeframe: Research and review of products will be ongoing, FY 2008-2012.*
2. Provide tools for libraries to develop, manage, present and preserve Montana-relevant digital content. *Timeframe: FY 2008-2010.*
3. Offer statewide federated searching and authentication services to libraries and patrons. *Timeframe: 2011-2012.*

4. Improve MLNCAT, the state's union catalog, by including more libraries and more resources, and by providing Montanans with self-service, machine-mediated access over the open Web. *Timeframe: FY 2008-2010.*
5. Support 24/7 online Ask a Librarian service for patrons to utilize from home. *Timeframe: FY 2008-2010.*
6. Support continued free access to the Internet as provided through local public libraries. *Timeframe: FY 2008-2012.*
7. Design and implement a series of interlibrary loan 'fulfillment' projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. *Timeframe: FY 2008-2012.*

**NEED #2: Montana libraries need leadership, training and consultation to reach their goals.**

**Summary Needs Assessment:** In 2007, librarians across the state were asked, "What do you see as the role of the Montana State Library?" Seventy-three percent of the 343 responses mentioned activities related to Need #2: "to me the State Library is the captain of the ship, leading us into uncharted waters, guiding and supporting all the libraries in Montana"; "we need exceptional support from a central place, a place where we can get individual training and Montana State Library has been providing that help ... I couldn't do my job without it"; "leadership – the staff is a very trusted resource"; "I see the role of MSL as being a mini Library of Congress that provides support and assistance to all the libraries in Montana so that we all maintain a high level of professionalism"; "to lead the libraries in the state to bigger and better things, to proactively research and help implement change"; and "I look to the state library for innovative direction for Montana libraries so we provide the best service possible to the patrons of Montana".

Montana librarians were asked in a 2007 survey to evaluate consulting services provided by MSL and more than 80% rated these services as useful. Within this group, 34% indicated these services were "useful", 33% "very useful", and 14% "extremely useful". When asked if the consulting services were important, the response was similar with 32% of the librarians indicating these services were "important", 29% "very important", and 23% "essential". Comments received in the survey focusing on MSL consultants included: "the statewide technology consultants help keep small and large libraries in the same playing field by the services they offer to every library" and "the MSL provides expert help in every aspect of library life ... the staff offer formal training on a regular basis, and immediate answers to each and every call for help ... individual libraries might survive, but would not thrive, without MSL".

Librarians were also asked in the survey about the impact of continuing education and the most frequent response (43%) was a positive statement about the value of the training on library services. Comments included "patrons benefit

from the new skills and knowledge that the library staff gain from training sessions” and “training provides ideas that ultimately shape the policies and services that affect the user experience”.

**Goal:** Montana library leaders and librarians need improved skills and knowledge to provide services and programs addressed in the six LSTA priorities. This will be accomplished by providing strong leadership and direction, reliable consultation services, and high-quality training opportunities that are relevant to the priorities of the LSTA legislation.

**LSTA Purpose:** Expanding services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages.

**Key Output Targets:**

\*During 2008, the number of librarians participating in live online training will increase by 50%.

\*By 2011, the number of library leaders attending MSL training will increase by 5%.

\*By July 2009, 100 librarians will subscribe to the RSS feed to be notified of new library development materials available at MSL.

\*MSL consultants will visit all public libraries annually.

\*MSL consultants will assist federations with development of Plans of Service annually.

**Key Outcome Targets:**

\*At least 75% of participants selected for assessment following the Fall Workshop will describe at least one specific increase in knowledge/skill/ability as a result of the training received at the workshop.

\*90% of librarians participating in live online training who are surveyed will rate their satisfaction with this training technology as at least “valuable”.

\*In a 2011 survey, 90% of public library leaders will indicate that consultant services resulted in improved services to library patrons.

\*In a 2011 survey, 90% of public library leaders will indicate that training received by library staff has improved services to library patrons.

\*In a 2011 survey, 90% of librarians will indicate satisfaction with MSL leadership is at least “high”.

**Program:**

1. Collect library materials to serve the professional development needs of Montana’s library leaders and librarians. *Timeframe: FY 2008-2012.*
2. Provide onsite and telephone consultant services for librarians across the state on relevant topics and technology. Provide follow up after training to maximize change in abilities/skills/knowledge from formal training events. *Timeframe: FY 2008-2012.*

3. Provide at least three formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the six LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. *Timeframe: FY 2008-2012.*
4. Enhance the Library Board Education Program having trained library leaders share their expertise and experience to enable fellow library leaders to address the LSTA priorities more efficiently. *Timeframe: FY 2008-2012.*
5. Explore and expand online/web-based training opportunities, both those developed by MSL staff and those created by others. *Timeframe: FY 2008-2012.*
6. Provide leadership and appropriate training to all librarians on critical issues, funding, local policies, promotion, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. *Timeframe: FY 2008-2012.*
7. Become a clearing house for information on conventional and online training opportunities and maintain and promote the online Montana Library Event Calendar. *Timeframe: FY 2008-2012.*
8. Continue to solicit input and recommendations from the Network Advisory Council on technology planning and priorities for statewide projects. *Timeframe: FY 2008-2012.*

**NEED #3: Libraries must form partnerships and collaborate so that patron information needs can be met.**

**Summary Needs Assessment:** In 2007, librarians across the state were asked, “What do you see as the role of the Montana State Library?” More than twenty percent of the 343 responses mentioned activities related to Need #3: “LSTA funds are very important to the development for public libraries and should be used to support cooperation ... we should not be in competition for funds”; “the State Library must continue to bring us together and help us succeed together, as a team”; “the State Library provides the mechanism to bring the various library groups together for collaboration ... someone has to advocate and facilitate”; “implement coordination and collaboration between libraries in the state”; “act as facilitator for multi-type library cooperation”; “our libraries all have common threads with different focuses, commitments, allegiances, etc. ...MSL can help connect these divergent and sometimes conflicting loyalties”; and “improve and maintain cooperation between and among libraries and other agencies in the state”.

Many survey replies mentioned a specific collaborative project, the Montana Shared Catalog: “the ability for libraries to share with one another is its greatest strength; the cost for each library is reasonable because of this consortium”; “MSC allows citizens from the comfort of their homes to search many libraries across the state and get the materials they need through interlibrary loan quickly”; “I feel that because of MSC, we now can hold our heads high at any association or national conference and proudly say, ‘I am from Montana, and we

are at the top of the library world”; “residents can see how useful their libraries can be to enrich their lives and provide lifelong learning opportunities”; “our library has transformed itself from a sleepy, little repository to a bustling, cutting edge library services laboratory because of the MSC”; and “it is like having a giant library with millions of books instead of just those in a building in a particular town.”

The Network Advisory Council recently recommended two projects to the State Librarian. One is a review of current statewide ILL protocols to improve resource sharing and a second is to appoint a Fulfillment Task Force to explore ways to balance ILL responsibilities and make costs fair across the state.

**Goal:** Improve and expand existing partnerships and collaborative efforts among libraries and other organizations and demonstrate benefits of cooperation and sharing to achieve expanded library services and access to information for all Montana residents.

**LSTA Purpose:** Providing electronic and other linkages among and between all types of libraries and developing public and private partnerships with other agencies and community-based organizations.

**Key Output Targets:**

- \*One new library district will be established by December 2012.
- \*Ten libraries will be added to the Montana Shared Catalog by December 2010.
- \* Ten libraries will add Montana-related digital content to statewide digital projects such as the Cooperative Digital Project by December 2010.
- \*By July 2012, twelve additional libraries will participate in a formal structured partner agreement such as the MSC partners group.
- \*MSC mentoring project will provide assistance to staff of all new shared catalog members each year.
- \*Develop one statewide programming effort each year and provide five training opportunities to implement programming effort locally.

**Key Outcome Targets:**

- \*Library districts surveyed in 2011 will report at least one expanded service as a result of the district formation.
- \*In a 2011 survey, 90% of public libraries that use MSL-created materials and tools for local programming will rate the quality as at least “valuable”.

**Program:**

1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. *Timeframe: FY 2008-2012.*
2. Educate library leaders about the benefits of library districts. *Timeframe: FY 2008-2012.*
3. Continue to partner with library vendors to extend statewide e-content purchasing programs. *Timeframe: FY 2008-2012.*

4. Expand Cooperative Digital Project in partnership with OCLC to increase Montana-related digital content. *Timeframe: FY 2008-2010.*
5. Implement Network Circulation Interchange Protocol (NCIP) project with OCLC serving as an interlibrary loan clearing house to connect disparate library systems for resource sharing and to demonstrate home delivery of library materials. *Timeframe: FY 2008-2009.*
6. Continue to develop What's Your Story programming materials and tools for libraries to use and continue to partner with organizations like AARP and the National Library of Medicine for funding and promotion. *Timeframe: FY 2008-2012.*
7. Design and implement a series of interlibrary loan 'fulfillment' projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. *Timeframe: FY 2008-2012.*
8. Explore and expand partnerships with groups such as the Montana Library Association, Montana Association of Counties, Internet providers, foundations, health care organizations, library schools, etc. *Timeframe: FY 2008-2012.*
9. Facilitate community leadership, library promotion, outreach services, community-wide planning and assessment, etc. *Timeframe: FY 2008-2012.*

**NEED #4: Montanans with visual, physical or reading disabilities need information in special formats using specialized equipment.**

**Summary Needs Assessment:** Statistics from Lighthouse, Inc., a vision services agency, show that individuals retiring during 2008-2012 are three times as likely to develop visual disabilities between the ages of 50-70 than their parents. Six million Americans are already affected with age-related macular degeneration, the primary cause of vision loss in the U.S., and as many as 15 million more are pre-symptomatic. In addition, 5.3 million adults suffer impaired vision caused by diabetic retinopathy that accounts for approximately one-quarter of diagnosed diabetics.

A 2007 survey on Montana Talking Book Library (TBL) services asked librarians about their familiarity with the program. Only 4% have an "in-depth knowledge", 30% have a "good knowledge", 42% are "somewhat knowledgeable", and 24% had "no knowledge" of TBL services. Clear differences surfaced based on the type of library responses. For public library staff, 46% have a "good understanding" of TBL services and 31% are "somewhat knowledgeable." Nearly 30% of both academic and school library staff reported "no knowledge" of TBL services. Current referral statistics to TBL reflect similar statistics: 67% from public libraries, 38% from special/institution libraries, and 21% from academic and school libraries.

As a result of patron surveys conducted in 2004 and 2005, the National Library Service (as reported in its Strategic Business Plan for Implementation of Digital Systems) set a goal to have all patrons equipped with digital books and players



by 2012. Three recent (2005-2007) TBL surveys indicate that nearly 60% of Montana patrons are interested in digital books and that 50% are currently using alternative sources, including digital books, to supplement TBL services now being provided. The 2007 survey indicated that 20% of patrons experienced problems with current (non-digital) equipment and 12% received damaged audiotapes on at least one occasion.

**Goal:** Increase awareness of TBL services through partnerships with libraries and eye care professionals and expand digital audio resources through collaboration with NLS, other states, and increased local digital production to provide special needs patrons with the information they need.

**LSTA Purpose:** Targeting library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, to individuals with disabilities, and to individuals with limited functional literacy or information skills.

**Key Output Targets:**

- \*By July 2012 there will be a 5% increase in registered TBL patrons.
- \*By July 2012 there will be a 7% increase in circulation of the TBL collection.
- \*By December 2010, staff will have made 48 presentations to eye care professional organizations about TBL services.
- \*TBL staff and volunteers will produce at least 50 digital books each year.
- \*A minimum of 288 materials (machines and books) will circulate to patrons at the six public library depositories by December 2010.
- \*The 174 veterans currently on the service will be verified and offered digital players by December 2009.

**Key Outcome Targets:**

- \*87% of WebOpac users surveyed in 2009 will report they can find materials they want using the online catalog.
- \*In a 2009 survey of veterans who received digital players and books, 100% of respondents will report that this equipment is easier to use and provides better sound quality.
- \*In a 2009 survey of six public library depositories, all library directors will report that TBL services improved the ability of local patrons to access needed resources.
- \*In 2011 survey, 90% of patrons will report that TBL services are “valuable” or higher.

**Program:**

1. Increase audio book, Braille, and descriptive video collections and improve Montana digital audio software recording program. *Timeframe: 2008-2012.*
2. Partner with six rural public libraries to establish TBL equipment and book depositories to increase resources available to Montanans in these locations and to facilitate the transition from standard print to audio or Braille materials. *Timeframe: 2008-2009.*

3. Develop and implement a library outreach program to deliver information about TBL services to academic and school libraries in rural locations.  
*Timeframe: 2010-2012.*
4. Collaborate with other talking book programs on interlibrary loan and consortium e-book agreements (Lobe Library) and with NLS on expansion of WebBraille and a similar format for downloadable digital books to provide patrons with more resources in alternative formats. *Timeframe: 2008-2012.*
5. Implement direct outreach program to individual medical eye care professionals and county health departments to reach individuals with visual, physical and reading disabilities as early as possible in the visual loss process.  
*Timeframe: 2008-2012.*
6. Develop partnerships with the Montana Optometric Association, Montana Academy of Ophthalmologists, and Low Vision Montana to encourage perspective patrons to seek TBL services. Establish TBL information booths and make presentations at quarterly and annual meetings of these groups.  
*Timeframe: 2008-2012.*
7. Target Montana patrons who are veterans and have priority to receive digital playback equipment and books. *Timeframe: 2008-2010.* Issue digital playback equipment and books to all patrons. *Timeframe: 2010-2012.*
8. Transition Keystone Library Automated System (KLAS) database to version 7.  
*Timeframe: 2008-2009.*

## **Summary of Planning and Implementation Procedures**

### **Stakeholder Involvement Procedures**

A planning committee was established to develop the draft strategic plan that was required by the State of Montana in 2006 for all state agencies. The committee consisted of members of the MSL staff and State Library Commissioners. Drafts of the strategic plan were posted on the MSL Web site and efforts were made over several months to collect input/comments on the draft using the library listserv and MSL publications. Presentations on the plan were made at all federation meetings in spring and fall 2005 and discussion of the plan was encouraged at these venues and online. Stakeholder comments were given careful consideration as the strategic plan was finalized.

The LSTA Five-Year Plan was drafted by a planning committee consisting of the State Librarian and staff of the Library Development and Talking Book Library departments. Input was also received from the consultant who collected data for and prepared the 2007 LSTA evaluation report. Using data from both the strategic plan process and the LSTA evaluation guaranteed that all key stakeholders – librarians, trustees, library users -- were involved in the development of the five-year plan. The draft plan was submitted to the State Library Commission for review, comment and approval.

The State Library Commission will ensure that the execution of the five-year plan is coordinated with the agency-wide strategic plan and with the priorities established for the Montana State Library. It will also provide additional opportunities for library leaders and library users to comment on the LSTA program. One ongoing venue for making comments is through the Network Advisory Council (formerly the Networking Task Force), a group the Commission has relied upon for several years to provide direction for statewide projects and priorities for LSTA funding. The membership of the NAC represents all types and size of libraries as well as each geographic region.

### **Communication Procedures**

Once the plan is approved by IMLS, it will be posted on the MSL Web site where it will be available to all academic, public, school, and special libraries and to all Montana library users throughout the five-year period. The plan will also be presented to trustees and librarians from all types of libraries at federation meetings in fall 2007. In addition, MSL staff will provide updates on programs and projects at all library federation meetings during the 2008-2012 time period.

The message to stakeholders will be that the plan is a working document designed to guide MSL in making efficient use of LSTA grant funds to the benefit all Montana citizens, with a continuing emphasis on statewide efforts. Descriptions of the data used and the role stakeholders played in the planning process will be included in the message.

Librarians and library users will be invited to submit their comments about the plan to the State Library by using a convenient online form accessible on the MSL Web site or they may comment directly to the State Librarian via email or telephone. Members of the State Library Commission and the Network Advisory Council could also be contacted and receive comments about the new plan. Feedback from all stakeholders will be given careful consideration and comments will be kept for use in the event that changes to the plan are considered during the five-year period.

### **Monitoring Procedures**

The implementation of the LSTA Five-Year Plan will be subject to regular and ongoing monitoring by MSL staff as assigned by the State Librarian. Primary responsibility for monitoring will be with the Library Development and Talking Book Library departments. All needs and goals included in the plan are important, but key elements that will be monitored include the impact of online training, of TBL outreach efforts, of increased statewide electronic resources, and of patrons utilizing self-service capabilities to obtain materials.

Progress reports on meeting the plan's goals will be prepared and presentations will be made to the State Library Commission and the Network Advisory Council

as required. In addition, MSL staff will provide updates on programs and projects to librarians and trustees attending library federation meetings each spring and fall.

Results of the plan will be reported to IMLS as required and to stakeholders as appropriate. IMLS will receive the State Program Report each year providing details about MSL's program activities and describing progress toward meeting the plan's goals. Stakeholders will be informed using a combination of library publications, the statewide library listserv, federation meetings, and State Library annual reports.

If corrections or updates are determined to be necessary, these will be done in consultation with IMLS and with stakeholders across the state. MSL will work closely with Montana's assigned IMLS state programs officer, explaining the need for changes in the plan and providing any required documentation of the proposed changes. Within Montana, the initial consultation about deviations from the plan will be with the Network Advisory Council because of its role in making recommendations about statewide projects and priorities. NAC members will be asked to assist with notifying the stakeholders they represent of substantial changes in the direction of the LSTA program in the state. Stakeholders will also be informed of changes using the library listserv and federation meetings.

## **Evaluation**

Evaluation will be an ongoing activity. MSL staff will continue to design and implement outcome logic models to evaluate the impact of selected LSTA-funded projects. This data will be collected using a variety of evaluation tools such as assessments, surveys and interviews, and will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC's input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.

In addition to these ongoing activities, a formal evaluation will be done as required by IMLS. Prior to the end of the five-year plan, a contractor will be selected through the state's bidding process to conduct a thorough and independent evaluation of the plan. The evaluation will include input collected from all stakeholders and this data will be included and interpreted in a written report. The completed report will be made available to all Montana residents and be submitted to IMLS for review and comment.