January 30, 2002

Dear Friends:

In 1996, the Montana State Library Commission (MSL Commission) approved a five-year plan for the state library. In August 2001, the MSL Commission accepted an evaluation of the agency's attempts to meet the plan's goals from the consulting firm Himmel and Wilson. The evaluation was very positive as the quote below demonstrates.

"Himmel & Wilson has completed projects for more than a dozen state library agencies in the United State over the past five years. We have also completed several studies that have compared state agencies in all fifty states. Consequently, we feel we are qualified to offer an educated opinion of the Montana State Library's (MSL) performance. The consultants believe the MSL offers the people of Montana a great value for every tax dollar invested in MSL's operation. Based on our experience, MSL does more with fewer resources than any other state library agency with which we are familiar."

The MSL Commission and the staff of the Montana State Library are proud of the evaluation results. We are pleased that our clients respect and trust the agency. All of us are determined to retain this trust and respect. One of the ways in which we can retain this high regard is to set forth a plan, based on our client needs, which clearly communicates our vision and activities for the next few years.

To prepare the 2002 plan, MSL used the evaluation report and its recommendations as indicators of client needs. To augment the evaluation data, MSL hosted a series of planning meetings with clients, which are described below. In addition, staff members held a number of internal planning meetings. The outcome of all these meetings was the draft plan which clearly states what the agency can and will do during the next five years.

The accompanying plan reflects many hours of work by Montana citizens and librarians, who attended planning meetings and submitted written comments, and by the staff and Commission of the State Library. Participants were thoughtful and serious about the task of writing the blueprint for the agency. I thank all those who contributed to the plan and those who will contribute to making our dreams come true.

Yours truly,

Rosemary Garvey
Chair, Montana State Library Commission

Methodology, Implementation, and Evaluation

Following is a summary of the development, finalization, and implementation of Montana State Library's five-year plan. The summary includes information about stakeholder involvement, communication, and monitoring procedures.

Stakeholder involvement

Library Development Department (LDD) and the Montana Library Network (MLN)

Department staff members identified issues through a series of in-house meetings. The State Library asked the library community to comment on these issues and to add others at nine meetings throughout the state. Meeting facilitators asked participants to prioritize all issues and then divided the group into small teams that worked on devising strategies to meet the identified issues.

Meetings were held in Billings, Polson, Bozeman, Great Falls, and Glasgow. These meetings, consisting of librarians and trustees from all types of libraries, were held in conjunction with the fall federation meetings. Approximately 175 people attended these five meetings. The data collected at these meetings influenced the selection of issues and their strategies in the final report.

MSL staff led planning exercises with three other stakeholder groups, including participants in the OMNI consortium, a group of tribal, academic and a community college librarians in Eastern Montana; the faculty at the University of Montana's Mansfield Library; and the members of the state agency librarians roundtable. In addition, the Networking Task Force, the advisory committee to MLN, considered issues and helped identify strategies at two of their meetings. Finally, the members of the MSL Commission held a planning retreat to review the issues and strategies for the whole agency, including LDD.

Talking Book Library (TBL)

The staff of the Talking Book Library (TBL) used stakeholder's perceptions as expressed in the written evaluation to guide their planning efforts. The evaluators held two separate focus groups involving selected members of TBL's users and partners. Staff then prioritized these issues and developed strategies to address them.

Library and Information Services Department (LISD)

LISD held focus groups with stakeholders as part of its reorganization in 1999. LISD staff members used this information and the results from the evaluation to revisit issues and strategies adopted by the MSL Commission in 1999. LISD staff members identified other issues and strategies for this update to their current plan.

Natural Resources Information System (NRIS)

Like other departments, NRIS used the evaluation results to identify issues and strategies. NRIS staff members met many times to identify issues and strategies for this update to their current plan. The NRIS Advisory Council, which consists of representatives from state and federal agencies and the private sector, commented on the plan at an early 2002 meeting. MSL used their comments to modify the draft plan.

After the draft plan was completed, MSL posted the draft on its website, with an on-line comment form. MSL notified interested parties of this posting through multiple messages on Wired-Mt, the Montana library community's list-serve. MSL received comments from only a few stakeholders regarding the draft plan.

Communication procedures

After IMLS approves the plan, MSL will make it available in paper format and on the State Library's web site. We will promote the availability of the plan though notices in our newsletter, "Big Sky Libraries", postings to Wired-MT, and in a notice in the Montana Library Association's newsletter, "Focus." MSL will distribute the plan to the Governor and to key legislators.

If the MSL Commission approves any substantive revision to the plan within the five-year period, MSL will submit the changes to IMLS according to the provisions of LSTA and notify stakeholders, through the venues noted above.

MSL staff members report on their activities related to implementing the plan to the MSL Commission at each of its meetings. The State Librarian and MSL staff also report achievements of important milestones annually at the Montana Library Association conference. MSL also highlights planning results in its annual report, which is shared with all stakeholders, including legislators.

Monitoring procedures

Managers tie employees' annual work plans to the activities in the five-year plan. Managers then evaluate each staff member by their progress in achieving results. As mentioned above, MSL Commission members also monitor progress through detailed bimonthly reports. Staff members provide the MSL Commission with an annual summary of progress and suggestions for mid-course corrections.

Staff members and the MSL Commission also monitor sub-grantee projects, which are funded by LSTA. Staff members do so by requiring status reports on the progress of the projects, regular site-visits, and through annual reports.

Evaluation plans

At the end of 2006, MSL will release a request for proposals to solicit bids to evaluate the agency's efforts to reach the goals enumerated in the five-year plan. Included in the specifications, will be a requirement that the data collection methodology be as inclusive as possible.

In addition to the formal evaluation, MSL staff members will provide the MSL Commission with an annual summary of progress and suggestions for mid-course corrections. Staff members will base their recommendations on an evaluation of progress made to-date.

An important piece of the evaluation will be the data collected through the Montana Poll. The Montana Poll is a project of the Bureau of Business and Economic Research at the University of Montana. The Bureau conducts the poll quarterly and in March 2002, the poll will include 10 to-15 questions about public library service. MSL will analyze the data and use it to benchmark outcome measures. In 2007, we plan to request that the Bureau include the same library-related

questions in the Poll, thereby allowing us to see if our efforts have increased the public's knowledge, use, and support of public library services.

In addition to this statewide survey, individual issues and programs in the plan call for other survey efforts. For example, in the LDD plan, we will survey residents in proposed library districts to measure their satisfaction with and use of the library before and after the project. Another example is the NRIS plan that calls for extensive user surveys to explore their needs for services and products. These surveys, both statewide and local, help MSL assess the impacts of our services on our target audiences.

Agency Goals

The mission of the Montana State Library is to help all citizens receive the information services that they need to improve or enhance their lives. MSL does so by providing comprehensive information about natural resources; fulfilling the information needs of state agency employees; preserving state publications; improving public library services; promoting cooperation among Montana libraries of all types; and providing reading material to those with physical disabilities.

Montana State Library's departments and programs share many common issues. The following is the agency's plan to address these intra-agency issues.

Issue: MSL employees have inadequate and unpleasant workspace.

Needs Assessment Summary: The space needs of the agency have and will change dramatically. The original use of the first floor was for the library's extensive collection and contained no office space. During the last 15 years, the agency has attempted to create office and work space but these efforts, while creating areas separate from the collection area, have resulted in small offices with inadequate lighting and few, if any amenities. Furthermore, as MSL's shifts to providing information resources on-line, areas that house the print collection are underutilized.

The second floor of the building is adequate to house the administrative functions of the library but is inadequate for the needs of NRIS and TBL. TBL's lack of adequate space and the inefficient use of existing space has become a critical issue and is addressed in TBL's section of the plan. Over the years, NRIS has attempted to remedy its needs for office and workspace, but these efforts have resulted in small offices with inadequate lighting.

Goal: MSL employees have pleasant, efficient, and sufficient office and work areas.

LSTA purpose: No LSTA funds will be used.

Key Output Target: Each year, visible improvements will be made to MSL's workspaces.

Key Outcome Target: MSL employees report a high degree of satisfaction with their workspaces.

Programs: Create and implement a building plan. *Contact state architect for advice and planning assistance. Prioritize needs and develop incremental plan to address needs. Inform budget office of plans and fiscal requirements. Staff leader: Karen Strege, Jim Hill, and Darlene Staffeldt. Time Frame: Ongoing.*

Issue 2: MSL must support a robust and reliable information technology infrastructure.

Needs Assessment Summary: Information dissemination through electronic means is critical to MSL's mission. Users of MSL expect uninterrupted access to our information resources through the web. MSL's services are inextricably bound to the World Wide Web and the software and equipment necessary to manage and offer the information in a user-friendly and secure manner. Current resources do not allow MSL to provide this access in a reliable manner.

Goal: Users have reliable and easy access to MSL's electronic services.

LSTA purpose: No LSTA funds will be used.

Key Output Target: MSL's systems are available 95% of the time.

Key Outcome Target: Users report high satisfaction with system performance and availability.

Programs: Develop an information technology plan and update annually. *Identify prioritized needs and inform the budget office of fiscal requirements. Work with ITSD to ensure that MSL takes advantage of available resources. Staff leaders: Darlene Staffeldt, Karen Strege, and Jim Hill. Time Frame: Ongoing.*

Issue 3: MSL must respect and value the contribution of each employee in achieving its mission.

Needs Assessment Summary: During this planning process, some staff members identified problems with morale, workspace, and salary concerns. Like any other organization, MSL must have the commitment of staff to fulfill its goals. To promote the best work from staff, MSL must improve methods of communicating with staff, both within the departments and agency wide; improve the physical working environment, as identified above; provide appropriate training; and insure that compensation is fair.

Goal: MSL employees are fully committed to fulfilling the agency's mission.

LSTA purpose: No LSTA funds will be used.

Key Outcome Target: Staff turnover will stabilize at 2.5% a year.

Key Outcome Target: Staff will be highly satisfied working at MSL.

Programs: Improve communication. *Managers will query staff on the format and time of departmental meetings and devise meeting methods that enhance participation and communication. Managers will encourage the use of the MINE site, the state's intranet for state employees, to ensure timely receipt of state employee information. MSL will hold a general staff meeting bi-monthly, which will feature a presentation by one or more staff members explaining their work. Time Frame: Ongoing.*

Improve training. *In addition to an individual training plan for each employee contained in work plans, MSL will offer two general interest workshops to all staff per year. Time Frame: Ongoing.*

Improve compensation. *The state offers an optional plan for certain occupational classes. Managers will investigate the use of this plan in the agency. Time Frame: Ongoing.*

Issue 4: The state of Montana must fund the statutory defined responsibilities of MSL.

Needs Assessment Summary: MSL relies heavily on funds through the Federal Government's Library Services and Technology Act (LSTA) to support the essential services of Program 1. Using LSTA to fund essential services, while in accordance with the purpose of the Act, leaves little funding for significant statewide or local projects. Also, relying on federal funding places the agency at risk when funds are diminished or the act is amended.

In addition, 60% of NRIS's essential services are funded through contracts or soft money. Many of these contracts contribute to the data collection and dissemination mission of NRIS; however, contract administration siphons time away from core services. Furthermore, contracts vary from year-to-year and create an unstable environment. NRIS's plan contains more details about this situation and ways in which MSL will address NRIS's funding problems.

Goal: All of MSL essential services are funded through state funds.

LSTA purpose: No LSTA funds will be used.

Key Output Targets: Each biennium, the governor's office and the legislature will approve increases in state funding for MSL essential services.

Each biennium, more LSTA money is available to improve library services in Montana.

Key Outcome Targets: The citizens of Montana are served by a state library that has stable and predictable funding.

Federal funds through the LSTA program are used for demonstration projects that improve library services to the people of Montana.

Programs: Develop an incremental plan to secure stable and predictable funding for the agency. *Time Frame: Plan completed by 2003.*

Educate state officials, the library community, and NRIS users about the funding situation of MSL, and develop broad support for proposed funding. *Time frame: Ongoing.*

Issue 5: Geo-spatial data has become a critical component of public policy decision-making. Although NRIS is designated by statute to be the clearinghouse of natural resources and related information, no agency is assigned the role of clearinghouse for non-natural resource geo-spatial information.

Needs Assessment Summary: As agencies develop geo-spatial information, centralized access to this data is needed to avoid duplication and to facilitate use. MSL is uniquely situated to offer this service because NRIS is a successful model of a centralized clearinghouse and the Statewide Library Program is mandated to provide access to all state publications, regardless of format.

Goal: MSL provides clearinghouse for all geo-spatial data.

LSTA purpose: No LSTA funds will be used.

Key Output Targets: A plan to develop the clearinghouse will be developed by 2004.

Key Outcome Targets: Citizens, businesses, and government employees find easy access to current and accurate geo-spatial data through MSL.

Programs: Interested parties will be invited to participate in a planning process. *This process will include representation from the Montana Geographic Information Council, the E-government Council, the NRIS Advisory Council, and the Montana State Library Commission. The process will cumulate in a plan identifying clearinghouse responsibilities for MSL regarding geo-spatial data. Time Frame: 2002 – 2003.*

Montana Talking Books Library

The mission of the Montana Talking Books Library's (MTBL) is to insure that all qualified Montana residents, that because of a disability, can not use standard print has free and easy access to reading materials

MTBL receives books and playback equipment from the National Library Service (NLS). The Commission allocates federal funds, through the Library Services and Construction Act, (LSTA), to support staff and operations.

Issue 1: MTBL patrons represent a small percentage of eligible Montana citizens.

Needs Assessment Summary: Access to audio and Braille reading materials significantly increases the quality of life for those who cannot read printed materials. Montana has approximately 32,100 citizens eligible for this service; 3,434 are "registered" patrons of the TBL program, representing 11% of potential population served.

Goal: To ensure that all eligible clients know about the availability of services from MTBL and to make enrollment and use of the service easy for users.

LSTA Purpose: To provide library services to those who have difficulty using printed or traditional library services.

Key Output Target: The number of MTBL clients will increase by 2% in 2002, 3% in 2003, and 4% in each year from 2004-2007.

Key Outcome Target: As measured through an annual survey, MTBL's new and current clients report a high degree of patron satisfaction with MTBL services (90+%) and report that MTBL services result in a higher quality of life.

Programs:

MTBL will use National Library Services (NLS) publicity materials to promote the services yearly, beginning in 2002. MTBL will measure the success of this program by ascertaining how many new clients have signed up due to the campaign's influence.

MTBL will make presentations and exhibit at five conferences per year. MTBL will evaluate annually the influence of these activities on user increases. *Time frame: Starting in 2002 and ongoing.*

MTBL will expand its current program of encouraging users in Montana to act as ambassadors for the program. *MTBL will select appropriate users to visit health care offices, schools, and other local sites to promote MTBL services by the end of 2004.*

MTBL will ask other agencies and organizations to promote MTBL services through their newsletters and placement of a link to MTBL on their web pages. *Timeframe: Ongoing.*

Issue 2: NLS is planning a transition from analog to digital formats for its recordings within the next six years. This transition will require a change in the playback equipment. These changes will require different recording and storage systems and therefore, require training for staff members, and volunteers.

Needs Assessment Summary: NLS has not yet decided on the media or the timeline of a transition to digital. MTBL does not control these decisions and the pace of transition. Therefore, MTBL will continue to closely monitor NLS's plans, convert its local recording studio to a digital format, and devote staff time to learning about the digital future.

Goal: MTBL will plan and implement a smooth transition to a digital format to ensure that the potential for expanded services are available to MTBL patrons.

LSTA Purpose: To provide library services to those who have difficulty using library services.

Key Output Targets:

1. To complete the transition with little disruption in service, as measured by circulation rates.

2. To adopt digital recording technologies in Montana's recording program synchronous with NLS's standards and plans.

Key Outcome Target: MTBL users will report through annual surveys that the transition has led to improved services.

Programs:

MTBL, in conjunction with NLS recommendations and specifications, will launch a digital recording project, to expand staff and volunteer knowledge and abilities regarding digital technologies. *MTBL will purchase and deploy digital recording equipment in the Helena recording studio and use this to record local Montana books. MTBL will explore different delivery systems in accordance with NLS recommended specifications and standards. Timeframe: 2003-2008.*

MTBL will be prepared to transition to digital books and convert locally recorded books to a digital format as NLS transitions. *Timeframe: 2003-2007.*

Issue 3: By 2003, MSL will not have enough space to shelve new NLS additions to the MTBL collection.

Needs Assessment Summary: NLS requires that MTBL keep two copies of every NLS recorded book received. MTBL thoroughly weeds its collection every year; however, we must store this "excess" material for a year before returning to NLS, or sending to other network libraries. We estimate that we need 58 more sections of shelving with six shelves per section.

Goal: Allow service to the patrons to be provided more efficiently and effectively by providing enough space for the collection.

LSTA Purpose: To provide library services to those who have difficulty using printed or traditional library services.

Key Output Target: Move sufficient portion of MTBL's oldest and least circulated collection (RC 6,000-RC19,999) to the first floor of the library to allow for a five-year growth in this collection.

Key Outcome Target: MTBL staff members and volunteers rate the changes as enhancing their productivity.

Program: TBL will complete an extensive space needs survey by August 2002. *Managers will review the study and make necessary arrangements for first floor storage by October 2002. The collection will be moved by the end of 2002.*

Issue 4: The staff and volunteer work areas are noisy and congested causing dips in productivity and low morale for staff and volunteers.

Needs Assessment Summary: MTBL staff members chose this issue as their priority concern. Although the staff and volunteer work area(s) were rearranged in 1998, problems remain, including the need for staff privacy to conduct work with patrons in an area that is used for volunteers. Staff and volunteers wish to share the same space, but some type of division is necessary for both entities to complete their work.

Goal: Increase productivity and satisfaction of staff members and volunteers.

LSTA Purpose: To provide library services to those who have difficulty using printed or traditional library services.

Key Output Targets:

1. Provide staff members with adequate and quiet work areas and at the same time provide volunteers with adequate and socially interactive work areas.

2. Provide walk-in patrons with an area containing appropriate equipment so that they may use TBL services.

Key Outcome Target: MTBL staff and volunteers rate their workspace as conducive to productivity.

Programs:

Identify space needs. Plan and implement needed changes. *Research solutions, including visiting other work areas, and select among alternatives, using the criteria of cost, feasibility, length of disruption in work flow, and ability to meet the five year needs of staff and volunteers. Time frame: Suggestions finalized by the beginning of 2003. Changes made by the end of 2003.*

Improve on-site services to patrons. *Create a dedicated computer workstation area complete with privacy, appropriate assistive software, and devises for walk-in patrons to be able to do online searches. Offer appropriate training for staff on the use of assistive software/devices in order to be able to assist walk-in patrons who may need staff assistance. Time frame: Completed by January 2004.*

Library Development Department

The mission of the Library Development Department LDD) is develop library services so citizens have the information resources they need to build strong communities and to succeed individually. To do so, LDD works with public libraries to improve library services to Montana citizens; encourages cooperation among all types of libraries; and, initiates and implements statewide projects to improve all facets of library services.

Issue 1: Montana library staff and public library trustees have ongoing and continuous needs for training.

Needs Assessment Summary: 16% of Montana public library directors hold a Masters of Library Science (MSL) degree. 38% of Montana public library directors have earned a bachelor's degree. The directors of 46% of Montana public libraries have either an MLS or a bachelor's degree. The evaluation recommends that MSL continue to provide continuing education to librarians, address the continuing education needs of library trustees, and use technology to deliver continuing education. Planning meeting participants ranked this issue, along with increased public library funding, as the highest priority.

Although MSL has improved its education program, staff believes that greater emphasis needs to be placed on targeting training to appropriate audiences and developed to meet the audience's needs, based on known adult education principles, and appropriately reinforced.

MSL must work with other partners, the Montana Library Association, the Office of Public Instruction, and the University System, to ensure library staff and trustees have access to appropriate training.

In addition to formal continuing education, librarians, trustees, and public officials have ongoing needs for information on a myriad of topics, including library funding, technology, opportunities, and laws. The evaluation substantiated the fact that MSL consultants are a valuable and respected resource for this information stating that the consultants play "a critical role in trouble-shooting, training, technical support and just plain hand-holding." MSL staff will continue to fill this information need, providing timely and accurate consulting services.

Key Output Targets:

1. By 2007, three additional Montana libraries employ a director who holds a MLS.

2. By 2007, five Montana public libraries employ a director who completed an associate's degree in library technology.

3. By 2007, all Montana public libraries will employ a director who either holds a MLS, an associate degree in library technology, or has enrolled in the summer institute program.

4. Librarians, trustees, and public officials will continue to r4quest information from MSL consultants and by 2007 will again rate the consulting services as critical to their success.

Key Outcome Targets: Montana citizens will report higher quality of library services.

LSTA Purpose: Linking libraries electronically with education, social or information services; assisting libraries in accessing information through electronic networks; encouraging libraries in

different areas, and encouraging different types of libraries to establish consortia and share resources.

Programs:

Insure that distance-learning based MLS programs are available and known by Montana's citizens and library workers. *Provide menu of distance education MLS programs by June 2002 and update yearly. Explore Emporia or other programs holding classes in Montana by June 2002.*

MSL will review the certification requirements for public library directors. *The Commission will consider the completion of an AA degree or the completion of the summer institute curriculum the required certification standard for library directors that serve communities with populations under 25,000 by July 2007.*

Each year, the summer institute will offer public library directors classes on basic library skills in a developmental sequence. MSL will explore making the classes a part of an associate's degree in library technology. *Explore other state's programs and make needed modifications by February 2003 and updated yearly*

Create a curricula and sequence of training opportunities, provided by or coordinated by the State Library, for librarians and trustees. *Where appropriate, organize these opportunities by topic and sequence. Integrate this curricula and sequence with MSL's existing certification program and requirements. Time frame: Ongoing.*

Facilitate the offering of an associate degree in library technology. *Participate in Western Council's grant proposal to offer a distance-learning education program for library staff without a professional degree, by February 2003. With the Montana University System, explore an AA program in the state. Time frame: Ongoing.*

Provide trustee training. *In 2002, offer full-day trustee training in three locations. Evaluate training results and plan annual trainings each year.*

Provide 'training templates', 'canned' tutorials or workshops, or other opportunities (such as library versions of 'farm tours' to successful district and networked libraries in nearby states or provinces). *Time frame: Ongoing.*

Continue to aggressively promulgate appropriate library automation, digital, and data network standards. Offer libraries a standardized method of collecting information regarding remote use of library materials. *At least twice a year, MLN will modify its current standards page, as needed. MLN will use every opportunity to encourage the appropriate use of library automation standards.*

Consultants will continue to respond to all requests from librarians, trustees, or public officials for information on library related issues. *Responses from consultants can include data, interpretation, onsite training, mediation, brainstorming, explanation, support, or whatever a particular situation requires to improve library services. In addition, consultants will serve as MSL's primary resource to assist librarians in the interpretation of the long-range plan and in achieving its library development goals. Time frame: Ongoing*

Issue 2: Some Montana citizens have inadequate library services because of declining or stagnant tax revenues.

Needs Assessment Summary: The taxable valuation of all but three of Montana counties has decreased over the past three years. Decreases in valuation means decreases in library funding.

59% or 47 of all Montana public libraries have per capita income from local sources lower than the state's average of $14.64. In 2000, 87% or 69 libraries had income from local funding below the national average per capita of $20.18 in 1988. Planning meeting participants ranked "increase public library funding" as their first priority, tied with training.

Goal: To improve library services to citizens by establishing an adequate and stable taxing district.

LSTA Purpose: Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities.

Key Output Target: By 2007, three areas of Montana will be served by a library district.

Key Outcome Target: As measured through post-project surveys, community members will report that their library services have improved since the establishment of a library district.

Programs:

Develop an LSTA program that funds demonstration district projects. Time frame: starting in 2002 and continuing to 2005. March through June, planning and evaluation of past year's project. July through September, project promotion including a grant-writing workshop. October through November, grant-writing period. December, grants evaluated and award notification. January, grant award.

Promote library district formation. *Make presentations at federation meetings, to individual city and county commissions, to state associations, and to pertinent organizations, ongoing. Create a mock, model library district. Make library-funding part of Montana State University Local Government Center's agenda to educate local officials. April 2002.*

Issue 3: Public libraries in Montana do not receive adequate state aid.

Needs Assessment Summary: Direct state funding represents 2.6% of the operating income of Montana's public libraries. The national average is 12.6%. Planning meeting participants ranked "increase public library funding" as their first priority, tied with training.

Goal: To ensure that all Montana citizens have access to quality library services.

LSTA Purpose: No LSTA funds will be used in this project.

Key Output Target: To increase the amount of direct state aid to Montana's poorest public libraries by 50% by July, 2007.

Key Outcome Target: As measured through post-project surveys, community members report that their library services have improved since the increase in state aid.

Program: Provide information on the state of Montana's poorest public libraries to legislators in 2003 in preparation for a request in the next two sessions. Request increases in state aid 2005 and 2007.

Issue 4: Montana citizens do not know about the services offered by their community libraries.

Needs Assessment Summary: Planning meetings participants ranked this issues as a high priority. In addition, the evaluation contained two recommendations regarding public awareness. The first was that, "MSL should consider including and funding a public awareness component in each new initiative that has a direct impact on current and potential library users." The second was that, "MSL should consider using LSTA funds to support a public awareness campaign." MSL believes that the responsibility for promoting library services is shared between the state and local libraries. This plan defines responsibilities for MSL, including training librarians and trustees.

Montana ranks very low on almost every economic indicator scale. To address Montana's economic development, Governor Martz has recently released a "Framework from Economic Development". MSL's marketing efforts will focus on the important role of libraries in economic development.

Goal: Montana citizens will understand, value, and use the services of Montana's libraries.

LSTA Purpose: Targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities.

Key Output Targets:

1. By the end of 2005, 85% of Montana public library directors will attend a workshop on marketing to local communities.

2. By the end of 2002, MSL will develop and implement a marketing plan for the state's libraries.

3. By the end of 2007, public library visits, on-site and remote, in Montana will meet the national average of 4.2 per capita (1998). In 1998, Montana public libraries averaged 3.8 per capita.

Key Outcome Targets:

1. Public librarians will increase their knowledge and skills in developing a sustainable marketing plan because of attending marketing workshops.

2. Citizens highly value public library services.

Programs:

Develop a marketing workshop by the end of 2002. *Schedule the workshop for federation meetings in Fall 2003. Promote attendance at workshops. Offer the workshop in other venues during 2004 for those unable to attend in 2003. Offer follow-up workshops in 2005.*

Provide press releases and other marketing materials to all libraries for every MSL activity, such as summer institutes, fall workshops, and new services or products. *Time frame: Ongoing.*

Provide bibliographies to library staff and trustees on marketing. *Time frame: September 2002 and updated annually.*

Issue 5: MLN must seek other methods of funding, and efficiently and effectively manage and promote its programs and services.

Needs Assessment Summary: Montana receives a limited amount of funds from LSTA and has many library improvement needs. MLN, which provides and promotes networked library services, is funded by a significant portion of Montana's LSTA annual allocation. The Commission wishes to find adequate, stable funding to continue MLN services.

The recent evaluation also makes recommendations for MLN that include the following: MSL should attempt to demonstrate the value of MLN programs to small libraries. This may include new MLN initiatives or a refocusing of current initiatives to make them more attractive for small libraries to participate. MSL should attempt to clarify the future role of MLN and should plan its funding strategies according to its determination.

LSTA Purpose: Establishing or enhancing electronic linkages among or between libraries; and encouraging libraries in different areas, and encouraging different types of libraries, to establish consortia and share resources.

Key Output Targets:

1. By 2007, one-half of MLN core funding is derived from state, local, or private funding.

2. By 2007, three-quarters of Montana libraries participate in one MLN project or use one MLN service.

Key Outcome Target: The majority of Montana library directors cite that library services have improved because of MLN.

Programs:

Explore alternative funding strategies. *This may include but is not limited to: Aggressively pursuing business and new governmental partnerships for funding and for help with providing services; seeking governmental alliances to encourage statewide and local support for MLN related projects; pursuing grants for one-time or start-up project funding. Time frame: Ongoing.*

Strive to insure that all libraries can all equally participate in MLN offerings. *Identify Montana poorest libraries noting in particular where libraries are unable to participate in MLN offerings and work with them to create solutions. Timeline: Ongoing.*

Increase the value and use of the MLN Gateway. *MLN will ensure that the gateway stays current and grows to include more libraries and resources. The gateway will be available for those libraries without an integrated library system and provide portal functions for all Montana's library users. Timeline: Ongoing.*

MLN will focus on marketing its services to all Montana libraries and on providing materials for libraries to market themselves. *MLN will formulate a marketing strategy, for marketing MLN resources and service to libraries by June 2003. By January 2004, MLN will make available marketing resource prepared for end-users, focusing on existing MLN resource and services. These materials will grow in number and scope.*

MLN will demonstrate its value to smaller libraries, with either new initiatives or refocusing current initiatives. *A small library needs assessment will be completed by July 2002. Program and marketing strategies will be completed by September 2002 and implementation will begin by 2003.*

MLN will continue to act, in partnership with others, as the state agency's library-oriented research and development unit, experimenting with promising technologies or processes when in support of MSL goals. *Time frame: Ongoing.*

Issue 6: The people of Montana do not have access to quality, electronic full-text resources.

Needs Assessment Summary:

1. Students in K-12 schools in Montana do not have access to adequate information resources.
2. Citizens through their public libraries, which are funded at 57% of the national average, do not have access to adequate information resources
3. In 1998, nationally public libraries spent an average of 1% of their total operating expenditures for materials in electronic format. During the same time, Montana public libraries only expended .004 of their total operating expenditures for these materials.

Goal: Citizens and students have easy access to and use multiple electronic information resources through their libraries.

LSTA Purpose: Assisting libraries in accessing information through electronic networks; and linking libraries electronically with education, social, or information services.

Key Output Targets:

1. By 2007, Montana citizens and students will have access to three additional, full-text electronic databases purchased through state and local funds.

2. By 2007, use of MLN managed electronic resources by all categories of users will have increased by 25%. All electronic information resources provided by the state will be monitored, benchmarked, and appropriate increases will be sought.

3. By 2007, 25% of Montana libraries will use cooperatives or networks to purchase discounted services and products.

4. By 2007, an increase number of Montana libraries will recognize the advantages of participating in a shared integrated library system. Based upon the number of shared catalog libraries in 2003, an increase number of Montana libraries will have joined, or be in the process of joining a shared system. 75% of academic libraries will participate in a shared catalog. The number of public

Key Outcome Target: Montana citizens and students use and value electronic information services available through their libraries.

Programs:

Provide access to more electronic information. *Survey library communities to ascertain which products are needed. Create a prioritized list and estimate funding requirements. Monitor new products to judge how well they meet the needs of Montana libraries. Time frame: February 2002 – March 2002. January 2004 – February 2004. Research quality databases that are free or broker licenses to those of interest to types of libraries and add links to MLN gateway. Time frame: Ongoing.*

Secure funding for additional licenses: *Develop and implement a funding plan for the 2003 and 2005 legislatures. Time frame: February 2002 – April 2003. February 2004 – April 2005.*

Build library participation: *Recruit libraries; ensure technical resources to access licensed databases. Provide statewide press releases and templates for local libraries to use. Time Frame: Ongoing.*

Provide training: *Offer a workshop on how to promote and instruct users in the use of the online products at one statewide venue each year. Post "Frequently Asked Questions" pages on MLN regarding products. Time frame: Ongoing.*

Continue to broker and manage the OCLC statewide license. *Time frame: 2003 –2004.*

Continue to purchase MLN Gateway access to WorldCat for all Montana libraries. *Time frame: Ongoing.*

Continue funding statewide BCR membership to aid Montana libraries with their purchase of content, training, and supplies. *Promote appropriate BCR services to Montana libraries. Time frame: Ongoing.*

Continue to improve resource sharing among Montana libraries, which may include changes to the current interlibrary loan program. *Work with established groups such as the Montana Library Association Interlibrary Loan Interest Group (ILL) to develop new ILL procedures. Time frame: 2002-2004.*

All Montana citizens will have access to a customized portal to quality networked library resources. *The portal will give citizens a core collection of electronic resources and provide access to readers' advisory and reference services. Design and implement plan; seek funding and implement. Time frame: 2002-2007.*

Issue 7: Montana citizens do not have consistent access to standards-based, networked, information infrastructure through their libraries.

Needs Assessment Summary: In 2000, almost half (35) of Montana's public libraries have dial-up connections to the Internet (another 40 have dedicated access, four have no access). Dial-up connections are inconvenient and offer slow and inconsistent access to online information resources. The evaluation recommended that MSL continue to monitor connectivity and consider ways in which LSTA dollars can be used to ensure that all public libraries have dedicated, high-speed Internet connects.

Currently, Montana has five shared-catalog cooperatives. One of these, called the Montana Shared Catalog, is the result of a cooperative promoted by MSL and partially funded by LSTA. Implementation of the catalog is scheduled for 2003. The Montana University System is discussing options for developing a shared catalog and is considering the needs of other types of libraries.

Goal: Montana citizens can easily access the holdings of all Montana and OCLC libraries and online electronic resources through their libraries.

LSTA Purpose: Establishing or enhancing electronic linkages among or between libraries; and encouraging libraries in different areas, and encouraging different types of libraries, to establish consortia and share resources.

Key Output Targets:

1. By 2007, all Montana public libraries will have sufficient, reliable, and affordable access to the Internet.

2. MLN will continue to work with others, such as the University System and other standards-based shared catalog systems, to provide access to Montana-relevant bibliographic resources.

3. By 2005, all public and academic libraries will participate in the OCLC statewide contract. The participation of school libraries will increase by 5% per year. The participation of special libraries will remain the same.

Key Outcome Target: The people of Montana will know and use the electronic information sources available through their communities' libraries.

Programs:

Continue to provide access to a variety of Montana libraries' catalogs and certain online databases via the MLN Gateway. *This program may include migrating Site Search functions to iBistro. Time frame: next five years.*

Assist public libraries with inadequate Internet connections. *Establish a competitive grant program linked to e-rate recipients with an established library data communications plan, targeting three to five libraries for data communications demonstration projects. Time frame: 2003 and ongoing.*

Continue to encourage libraries to participate in the e-rate program. *Time frame: Ongoing.*

Work with libraries and a variety of Montana Internet Services providers to plan for libraries' current and anticipated communications needs. *Time frame: 2003 and ongoing.*

Continue to promote the development of the shared Montana catalog and any other standards based, integrated library systems. *Offer LSTA funding to libraries in the South Central and Sagebrush federation in 2002 and 2003. Evaluate continued funding of participation in the shared Montana Catalog. Continue to work with the governing body of the shared Montana catalog to promote development and substantial policies and procedures and participation in the cooperative. Time frame: Ongoing.*

MSL will continue to work with other institutions to promote the development of a statewide catalog and/or the development of robust individual catalogs that can be easily accessed and used by all Montana citizens. *Time frame: Ongoing.*

Issue 8: Montana library staff members do not have access to reliable and or convenient technical support.

Needs Assessment Summary: During the planning meetings held statewide, a number of participants identified lack of technical support as a major issue. Anecdotally, LDD staff members know that many libraries do not have technical assistance in their community. To fill this gap, LDD staff members receive many calls from library staff that request technical assistance. MSL's

role is to provide easy to use access to technical information and to build the knowledge, skills, and abilities of library staff.

Goal: Montana citizens and students will have dependable access to electronic information services at their libraries by the end of 2007.

LSTA Purpose: Assisting libraries in accessing information through electronic resources and encouraging libraries in different areas, and different types of libraries to establish consortias and share resources.

Key Output Targets:

1. Technology librarians report a decrease of 25% of calls regarding technical assistance by 2007.

2. Library staff from 50% of all Montana libraries uses the online expert file and the MLN produced FAQs by 2007.

Key Outcome Target: Public library patrons surveyed report that their libraries offer reliable and adequate access to electronic information and other resources.

Programs:

Develop an expert file regarding technical assistance. *Identify experts in pertinent subject areas and their willingness to share their expertise with others. Develop an interactive database by the end of 2002. Promote, monitor, and evaluate use.*

Develop a web-based, technical assistance program, *including FAQs. Identify areas of need and develop FAQs and/or links to existing materials by the end of 2002. Promote, monitor, and evaluate use.*

Provide training**.** *In 2002, MSL will offer three shorter summer institutes, which will include comprehensive training on network troubleshooting. MSL's annual fall workshop will continue to offer practical training on workstation and network maintenance.*

Issue 9: Montana public library buildings are inadequate to provide quality library services.

Needs Assessment Summary: Federation planning meeting participants gave this issue a medium priority. Although MSL has not inventoried building needs, MSL staff members who travel to public libraries report that each public library building in Montana is deficient in some area**.** Although the focus of the needs assessment and workshops will be public libraries, MSL will make the information about building assessments available to all libraries.

Goal: Montana citizens, local and state government officials, legislators, library staff members, and trustees will have accurate and current information about the condition of Montana's public libraries buildings by the beginning of 2004. They will use this information to determine state and local solutions to problems identified.

LSTA Purpose: Paying costs for libraries to acquire or share computer systems and telecommunications technologies; 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:

1. By March 2003, 85% of all public libraries will have completed a building survey.

2. By 2006, 50% of all public libraries that have inadequate facilities will have building program plans.

Key Outcome Targets: Public libraries that have inadequate facilities will report improvements in their building condition.

Programs:

Design, distribute, analyze, and publish a building condition survey by May 2003*. MSL will make six presentations on how to complete the survey at federation meetings in Fall 2002. MSL will use its online capability to post the survey online.*

Provide training to public librarians and trustees on writing a building plan, through workshops in 2004 and 2005.

Provide bibliographies to librarians and trustees on building design, remodeling, and planning. *Time frame: September 2002 and updated annually.*

Library and Information Services Department (LISD)

The Library and Information Services Department is the "library" component of the Montana State Library(MSL) and serves the work-related information needs of state government employees, provides backup reference assistance to librarians throughout the state, and provides public access to state publications for Montana citizens.

Issue 1: State of Montana officials and employees need timely access to comprehensive and authoritative information to conduct research and form good public policy.

Needs Assessment Summary: Decisions are based on the information at hand at the time the decision must be made. In 2003, state employees need and expect that information to be available at their desktops. Many use the Internet. Not all information is available on the Internet and it is not adequately organized or comprehensive to provide easy access to the best information available. Many employees do not have the skills to search for information efficiently.

LISD is changing the way in which it delivers services to this target patron population by making pertinent, current information available from our web pages and by offering workshops. LISD will continue to encourage clients to use the services of the reference librarians, who are information specialists and can quickly locate other pertinent and authoritative resources, as well as teach the skills necessary to navigate the information wilderness effectively.

LISD must continue to develop new business practices, to evaluate the best mix of resources and services, to promote these services, to train employees in their use, and to measure their use and value to patrons.

Goal: State employees have the information that they need to make good public policy recommendations and decisions.

LSTA Purpose: No LSTA funds are used for this department.

Key Output Targets:

1. The number of state employees using LISD services will increase from 400 to 1000 by FY 2007.

Key Outcome target: State employees report that they rely on LISD services to obtain valuable information that help them make recommendations and decisions.

Programs:

Expand LISD web pages for state employees. *Include links to selected resources specific to agency areas of interest and the current hot topics of state policy and governance; monitor use, survey web page viewers with a online survey and improve as patron feedback suggests. Time frame: Ongoing.*

Add or modify services and collections to meet state employee needs. *Survey non-users to determine services needs. Convene a focus group(s) consisting of employees who are in*

positions that need information resources that do not use our services. Analyze results and identify needed changes. Time frame: Report to program manager by Summer 2003.

Continue to survey existing collection to see if it meets employee needs. *Discard outdated or non-essential materials. Make decisions upon journal back issues. Improve the acquisition of cataloging, managing, and publicizing electronic journal subscriptions. Time frame: Ongoing.*

Continue to improve public services and collection areas of the library. *Discard outdated or non-essential materials. Consolidate collections and eliminate empty shelves. Time frame: Discarding monographs complete by October 2002. Discarding federal documents completed by January 2004. Initial collection shifting completed by November 2002*

Continue to market the services of the department. Outreach to agencies attending department staff meetings. *Monthly postings to database of users promoting services and monthly postings to Wired-MT. E-mail promotions to new state employees. Brochure for state publications center to area libraries and for Find-it Montana. Investigate self-subscribe mailing lists for library updates. Evaluate the success of marketing efforts. Time frame: Ongoing.*

Continue to train state employees on the use of certain products. Evaluate effects of training on the use of resources. *Two days of three workshops planned Jan-June, Sept-Dec Time frame: Ongoing.*

Review the use of monographs and printed journals. *By December 2002, provide detailed report to program manager on the use of journals and monographs and suggestions for possible resource realignment.*

Review the use of federal government publications. *By January 2004, report to program manager and supervisor on the use of the collection and the impacts of changing MSL's selective depository status.*

Plan for the development of a computer-training lab at the State Library. *By May 2002, make recommendations to program managers regarding resources needed for a lab for possible inclusion in 2004-5 budget.*

Continue to find new methods and improve current methods to accurately measure remote use of the library's resources and to document the value of library services and resources. *During 2002, continue to monitor use with current tools; work with ITSD and Nehring to develop better methods. Explore a professional survey of patron populations and using the Special Library Association survey of patrons. Time frame: Ongoing.*

Issue 2. LISD must serve the professional information needs of Montana local library staff through a professional literature collection. LISD also serves as a reference backup to the state's libraries.

Needs Assessment Summary: Because Montana lacks a library school, MSL, through its library department, has traditionally offered Montana librarians access to professional journals and materials that are too expensive for most librarians to purchase. Because many libraries have inadequate collections or library staff members lack the necessary knowledge to answer some information queries, MSL has also traditionally provided reference services to library staff. The use of this service has decreased due to the availability of information through the Internet and the increased skills of library staff.

Goal: The staff of Montana libraries know about and have access to the professional literature that they need. They obtain assistance from the MSL reference staff for patron questions they are unable to answer via their own resources, Internet resources, and listservs.

LSTA Purpose: No LSTA funds are used for this department.

Key Output Targets:

1. Increase the use of the professional collection each year by 10%.

2. Increase the proportion of Montana libraries using MSL reference and collection resources by 20% by end of FY03.

3. Increase the visits to LISD web page for librarians by 5% each year.

4. By 2007, 50% of Montana libraries report that they use Find-It Montana to locate information for patrons.

Key Outcome target: By having access to the LISD collection and reference staff, Montana library staff will improve services to their patrons.

Programs:
Improve LISD web pages for librarians. *Monitor use, survey web page viewers with an on page survey, and improve as patron feedback suggests. Coach librarians on resources by posting monthly-annotated descriptions of selected resources on Wired-MT. Time frame: Ongoing.*

Coach librarians on reference skills when responding to reference assist calls. *Time frame: Ongoing.*

Promote current awareness services from library journal subscriptions to Montana librarians. *Time frame: Ongoing.*

Evaluate the current use of the library science collection and align collection with needs. *Solicit Wired-MT librarians for needed professional materials. Work with other libraries to adopt cooperative collection development agreements regarding library science collections. Time frame: By August 2003.*

Promote the library science collection. *Continue to highlight monographs in monthly updates to Wired-Mt. Investigate the use of Table-of-Contents and other services to promote the collections. Time frame: By January 2003 and ongoing.*

Issue 3. Montana citizens need and have the right to easy access to information by and about its state government. MSL is mandated to serve as the repository and public access point to state agency publications.

Needs Assessment Summary: Citizens frequently do not understand how state government is organized, nor which subdivision of which agency has responsibility for the functions or activities in which they are interested. Therefore, it is difficult for them to access the information they seek even if it is on the Internet. There is no subject catalog to web-based publications.

The move to posting state agency publications on-line has also led to problems of capture and preservation by MSL. Information on an agency web page today may be gone tomorrow and defeat our role of preserving important information for future users and researchers. MSL has an

incomplete understanding of who uses the current collection, why they use it, how they use it, their future needs, and who needs to use it that does not know about it. MSL's state publication distribution center is not always capturing, cataloging, and preserving important print and web-based publications. The needs of depository libraries in this new environment are unknown. The program may be missing opportunities to promote information by and about state government to citizens through their local libraries.

Goal: Montana citizens have easy access to a comprehensive collection of state publications.

LSTA Purpose: No LSTA funds are used for this department.

Key Output Targets:

1. By 2004, the proportion of state publications received and cataloged will increase from 40% to 90% of the estimated appropriate publications available.

2. By 2007, the monthly average number of visits to the state publication center web pages will increase by 25 over 2001's baseline.

3. The fulfillment rate for request for legacy print publications will increase to 98% over a baseline established in FY 03.

4. By the end of the Find-it pilot project, June 2003, the project will provide: Internet access to at least 2000 records; provide Internet access to a subject catalog indexing 50 key agency web publications from at least five agencies; and include web publications from at least 15 agencies.

5. By 2007, a minimum of 10 agencies will participate in Find-it Montana and more than 20,000 records will be included in the catalog.

6. The number of searched conducted in Find-it Montana will increase by 2000% over the average of the three months following the official launch of the project.

7. By 2007, a plan for preserving electronic publication has been approved.

Key Outcome Targets:

1. Libraries in the depositary program report satisfaction with the program.

2. Users of the state publications program report satisfaction with their access to the publications.

Programs:

Increase the number of publications received. *Contact* appr*opriate agency personnel about the print depository program and the value of placing their publications in the SPC. Consider changes in statute pertinent to needed changes in the center by February 2004. Time frame: Ongoing.*

Increase the use of the collection. *Improve web-access for users. Revise state and federal documents web pages, monitor use, survey web page users with on-line survey, and improve as patron feedback suggests. Continue posting notable new state agency publications to Wired-MT. Identify other potential email recipients of shipping list and notable new publications. Time frame: Ongoing.*

Implement a GILS pilot project, Findit Montana, to increase access to and use of web-based agency publications. *Promote to Montana library community, state government officials and employees, and the public. Identify appropriate agency personnel and contact them relative to their significant web-based publications for inclusion in the Find-it Montana subject index. Time frame: Ongoing.*

Use state of the art and best practices in managing state library publications collections, both electronic and print. *Identify and survey state libraries with mandates relative to state documents similar to our mandate. Time frame: Ongoing.*

Continue to review the resources needed to catalog state documents. *Currently, LISD contracts with BCR for original cataloging of state documents. This new contract will be evaluated by the end of 2002.*

Continue to coordinate the state's involvement in the Name Authority Cooperative Program Funnel Project from the Library of Congress. *Complete initial training in 2002 and continue involvement. Time frame: Ongoing.*

Make necessary changes in the depository program to reflect members' needs. *Survey depository members and implement identified changes. Time frame: 2003.*

Issue 4: The users of the State Library need to have reliable and complete access to the collections of the State Library and access to other information resources held by other libraries or published on the web.

Needs Assessment Summary: Currently, users do not have complete or accurate access to all local holdings, the holdings of other libraries, and comprehensive guides to online resources.

Goal: Users have easy and comprehensive access to information through the library.

LSTA Purpose: No LSTA funds are used for this purpose.

Key Output Targets: We are collecting data to create benchmarks to measure use of the catalog and the use of "click-throughs". At the end of 2002, we will create specific targets.

Key Outcome Target: Users of the catalog find it easy to locate the information sought.

Programs:

Convert to new integrated library system. *Prepare data and collection for transition. Train staff and work with IT staff to ensure a smooth transition by June 2004.*

Make the catalog the easy-to-use, content-rich, portal to LISD resources and services. *Time frame: Ongoing.*

Natural Resource Information System (NRIS)

NRIS is dedicated to providing Montanans with comprehensive and accurate information that is essential to managing our natural resources. NRIS staff assembles this information from diverse sources, use the best available technologies to deliver it efficiently, and provides exceptional customer support.

Issue 1: Resource managers, scientists, policy makers, businesses and citizens must have access to comprehensive, current and accurate information relating to Montana's natural resources to make sound decisions.

Needs Assessment Summary: Government agencies that produce data often do not have a mandate to disseminate such data widely or have limited resources for dissemination. In addition, information is often broadly scattered among state and federal agencies, other institutions, and individuals, and some types of information are incomplete or not yet assembled. One of NRIS's mandates is to centrally collect and coordinate the dissemination of natural resource information.

LSTA Purpose: No LSTA funds are used for NRIS.

Goal: To fulfill its mandate to be the source for natural resource information in Montana, NRIS must acquire, integrate, maintain, and document natural resource data and information needed for understanding, managing and utilizing Montana's natural resources, and environment.

Key Output Targets:

1. Increase the quantity and quality of data available through the NRIS clearinghouse. Identify and incorporate high priority datasets identified through the biennial survey and other inputs, with a goal of acquiring three of the top priority datasets identified in the Data Plan each year.

2. Formalize relationships with data producers/data providers to improve the timeliness of data in the clearinghouse. Establish written agreements with data producers/providers for ongoing exchange/support of data. Refresh the data in the clearinghouse on the schedule identified in the Data Plan.

3. Properly document all data in the clearinghouse. Ensure that appropriate metadata records accompany all new datasets; develop metadata records for twelve existing datasets per year until all datasets are properly documented.

4. Add value to clearinghouse datasets through the integration of these data in a common geodatabase structure, eliminating duplicate datasets, increasing the accuracy of holding information, or improving the link between the spatial representation of a dataset and associated attribute data. Document six occurrences each year where incorporation into the NRIS clearinghouse results in significant benefit.

5. Identify key data gaps and implement strategies to enhance data completeness by direct action (especially related to biological resources) or by supporting and assisting the efforts of others.

Key Outcome Targets:

1. State and local government agency users report that the information available through NRIS has improved their capability to make program, policy or management decisions relating to agency mandates, that access to data through NRIS has improved the utility of their own data for in-house use, and that access to data through NRIS has reduced their costs.

2. Montana businesses report that ease of access to Montana natural resource information has supported their ability to develop, maintain, or increase business capacity, has made their business more efficient, and has improved their ability to meet the requirements of regulatory agencies.

3. Montana citizens report that access to information produced by state agencies has increased their knowledge of Montana's natural resources, has enabled them to make better decisions regarding natural resource issues, has helped them effectively participate in and understand state agency decisions and actions regarding natural resource issues, and has provided them information they have effectively used for personal business, recreational, or other use.

4. Visitors (and potential visitors) to Montana report that they have used information provided by NRIS or through other agencies using NRIS data access tools to help them plan their visits and enhanced their enjoyment and use of recreational opportunities related to Montana's natural resources.

Programs:

Improve coordination and outreach. *Obtain/maintain knowledge of natural resource data need and availability by attending meetings relating to natural resource issues, serving on working groups of agencies and organizations involved in natural resource issues, and maintaining involvement in the GIS community. Time Frame: Ongoing.*

Focus on data inventory. *Conduct/maintain a comprehensive data inventory, including new data of potential value to clearinghouse users. Conduct a biennial survey of state natural resource agencies to identify datasets appropriate for inclusion in the clearinghouse. Time Frame: Current holdings - September 30, 2002, Biennial survey – ongoing.*

Develop a data plan for acquiring, managing and serving data of great value to users. *Develop/maintain a strategic data plan that:*
Sets forth minimum standards for inclusion in the clearinghouse
    Identifies available datasets appropriate for inclusion in the NRIS clearinghouse;
    Identifies data gaps and strategies to address them;
    Sets forth priorities and schedules for importing/updating clearinghouse data;

Identifies consolidation/optimization opportunities;
Identifies appropriate data delivery mechanisms.
Time Frame: June 30, 2002.

Continue to acquire data and update existing data. *Time Frame: Ongoing.*

Improve data documentation. *Develop/maintain metadata records for all data included in the clearinghouse. Provide limited training and support to state agency personnel tasked with development of metadata for agency datasets. Evaluate the addition of records to OCLC's World Cat and the use of Dublin Core. Time Frame: Ongoing.*

Continue to develop data. *Encourage development/refinement of priority datasets (data champion); manage the development/refinement of orphan datasets (data custodian for those datasets not the responsibility of other agencies). Time Frame: Ongoing.*

Issue 2: To be effectively used, natural resource data must be easily located, provided in common formats that serve user needs, associated with related data, and made available on demand when and where needed; data access, display and analysis tools must be readily available and easily understood. The inability to quickly locate, obtain and effectively utilize existing data may result in poor decision-making due to lack of adequate data, or increased costs and delays associated with duplication of data collection efforts.

Needs Assessment Summary: Locating and obtaining high quality natural resource information in a form that can be readily utilized is difficult, as multiple agencies use various formats to manage data. NRIS must validate, control the quality of, and standardize date to ensure consistency, accuracy, and maximum utility. In addition, the ability of NRIS clearinghouse users to find and effectively utilize such data varies from novice to expert. Various abilities of user require that NRIS present information in formats easily accessible to a broad range of users.

Goal: A broad range of user groups can easily locate data in effective formats. Users find that this information is augmented with related datasets to increase their value. Potential NRIS users are well informed of information available through the clearinghouse and trained in the use of NRIS tools. Staff assistance is available when needed to assist users in locating and utilizing data.

LSTA Purpose: No LSTA funds are used for NRIS.

Key Output Targets:

1. Increase automated data access, with a goal of a 10 % increase in Web hits and megabytes downloaded each year.

2. Improve the reliability of NRIS data delivery mechanisms, with particular focus on providing Internet access in response to user needs as identified in the biannual survey.

3. Provide staff-assisted access to data for users not able to obtain data through automated means, with a goal of responding to an estimated 2000 user requests per year

Key Outcome Targets:

1.   Users report that the data access, display, and interpretation tools available through NRIS enable them to obtain maps, data summaries, and other products without having to own or become knowledgeable of specialized hardware and software, saving them time and money.

2.   The range of user groups served by NRIS continues to broaden. In addition to an increase in government agency users, Montana businesses and citizens find and utilize data served through the NRIS clearinghouse and other catalogs.

Programs:

Continue and improve efforts to educate and inform. *Provide information about NRIS to all user groups using news releases, feature stories, newsletter articles, conference presentations, and seminars. Survey users biannually on the utility of NRIS data access methods and tools and on their particular data access requirements. Provide training and evaluate its effectiveness. Utilize a combination of news releases (12/year), feature stories (2/year), newsletter articles (12/year), conference presentations (6/year), seminars (2/year), and email to advise users and potential users of NRIS products and services, new data or data access tools, and significant changes to the NRIS clearinghouse. Time Frame: Ongoing.*

Continue to offer mediated services*: Maintain mechanisms to receive user requests via phone, email, and web-based request log. Respond to user requests as appropriate. Time Frame: Ongoing.*

Develop and maintain website development. *Develop and maintain NRIS website to provide the means to serve data to all user groups. Continually refine the organization and presentation of clearinghouse data to take advantage of improved technology to directly address the identified needs of major user groups and to respond to feedback. Time Frame: Ongoing.*

Improve data access. *Develop/maintain effective search mechanisms to enable users to quickly locate data available through the NRIS clearinghouse. Maintain the Montana State Library FGDC clearinghouse node and ensure that NRIS data are fully represented. Input to the development of nationally supported information search mechanisms such as the Global Information Location System (GILS). Ensure that state government indexing systems properly index NRIS data holdings. Evaluate the addition of records to OCLC's World Cat and the use of Dublin Core. Time Frame: Ongoing.*

Improve and maintain data dissemination. *Improve/maintain access to data for all user groups by providing multiple pathways to clearinghouse data, including a library of existing map and data summary products, Internet-based interactive access to*

geospatial data, and access to raw geospatial and related attribute data for use by GIS professionals. Time Frame: Ongoing.

Develop/maintain the hardware/software environment to provide full time access to clearinghouse data, with down time at a level acceptable to users. Time Frame: Ongoing.

Issue 3: NRIS core funding is inadequate to fully accomplish its mission as described under Issues 1 and 2.

Needs Assessment Summary: NRIS currently receives funding for six FTE through legislative appropriation. The ability for NRIS to accomplish its mission using a staff of six is limited because (a) data assimilation/dissemination demands are greater than can be met with a staff of six and (b) it is difficult to obtain the necessary level of Internet, GIS and database technical expertise as well as natural resource knowledge within a staff of six. In order to maintain the necessary level of staff resources and staff expertise, NRIS must employ a staff of approximately ten persons, or four more than are currently provided for through core funding.

NRIS currently makes up the difference through contracts with state agencies and other users, who often have data access, display, and dissemination needs that cannot be met using their in-house resources. Through these contracts, NRIS is normally able to support its full complement of staff, as well as develop/refine datasets and develop new data access, display, and analysis tools that are then integrated into the general clearinghouse. However, work available through contracts is driven by project needs that are often not fully aligned with general clearinghouse needs; thus staff resource demands associated with general clearinghouse needs are sometimes diverted in response to contract demands. In addition, contract funding has proven to be unavailable at times, resulting in loss of staff and the subsequent difficulties associated with restaffing the program.

State funding accounts for only 60% of Heritage program's basic operations. This program, an integral part of NRIS services, needs to find stable and reliable funding for its core services.

In order for NRIS to fulfill its mission, a higher percentage of core funding is necessary. Legislative and executive branch policy makers must fully understand the benefits of the NRIS clearinghouse so that NRIS receives an appropriate portion of the funding available to support information technology resources.

Goal: In order to fulfill its mandate as described under Issues 1 and 2, NRIS must secure adequate and stable funding.

LSTA Purpose: No LSTA funds are used for NRIS.

Key Output Targets:

1. Clearly define the role of NRIS, its relationship with state agency programs, and its relationship with other clearinghouses.

2. Inform and educate executive and legislative branch policy makers of the benefits of NRIS.

3. Develop contracts with agencies at a level that supports staff not funded through core funding, with a goal of maintaining stable funding for a staff of ten FTE.

Key Outcome Targets:

1. Policy makers have a clear understanding of NRIS mission, the benefits of NRIS, and the overall cost savings to the state associated with the NRIS clearinghouse.

2. NRIS receives increased core funding each biennium until NRIS is no longer dependent on contract funding, with a goal of replacing contract funding with core funding for one additional FTE each biennium.

3. NRIS is able to maintain the broad range of staff expertise necessary to fulfill its clearinghouse mandate.

4. NRIS is able to concentrate on developing/refining statewide or regional datasets of use to a broad range of NRIS users.

5. NRIS is able to develop/refine data access, display, and interpretation tools of use to a broad range of NRIS users.

6. Montana experiences an overall savings in the cost of products and services related to access and use of natural resource data.

7. All NRIS users benefit from the additional staff expertise, additional data, better data access, and display and interpretation tools made available through the NRIS clearinghouse.

Programs:

Improve education and outreach. *Clearly define the role of NRIS in the information and GIS community and communicate that role effectively to users and policy makers. Time frame: Ongoing.*

Develop supplemental (contract) funding. *Develop contracts with state agencies and other NRIS users to provide data acquisition, development, management, and dissemination support, and applications development services. Seek contracts related to providing or improving access to natural resource and related data, beyond the products and services provided through core funding. Time Frame: Ongoing.*

Explore changes in the contract relationship between MSL and the Nature Conversancy (TNC) with the Nature Conservancy and the staff of the Heritage Program. Time Frame: 2003.

Continue to inform and educate the executive and legislative branch on NRIS' value to state services and seek additional funding for core services. Time frame: Ongoing.