Montana State Digital Library
Transition Plan
Library Commission Discussion Document
April 25, 2004

Phase/Project	Problem/Need	Goal	Initial Steps/ Dates	Issues	Staff
Transition – Act on LISD evaluation recommendations to transition away from selected traditional library functions that MSdL does not have the resources to maintain.					

Print materials (not including State Publications)
 - Monographs
  - Journals
  - Federal docs
	Print collections are not used enough to justify maintenance of the collection.
	
	External sources may be available for federal documents.
		Maintain print collection only for documents not available electronically or not available in print through external sources.	De-selection of print materials
			
			Monographs – Evaluate standing orders as to their use and utility. (Completed by _____)
			
			Discard circulating monographs that have not been used in one year. Offer worthwhile materials to Montana libraries. (Completed by _____)
			
			Journals – Evaluate usage rates. Offer back issues of journals not used to other libraries. Evaluate usage rates for all others before renewal. (Completed by _____)
			
			Federal docs - Review usage rates and assess ongoing need for remaining selections. Investigate ability to rely entirely on external federal documents collections. (Completed by _____)
			Maintain annual weeding schedule. Weed the USGS area this year. Evaluate need for census materials that rarely get used since we refer most questions to CEIC.
				Journals - May not be able to rely on commercial vendors for long-term access to electronic journals as a substitute for an in-house print collection.
				
				Monographs – Should MSdL collect library professional resources?
				
				Federal documents - The new Superintendent of Public Documents is making changes quickly in the depository program. We will need to reconsider our collection and our status as depository library based on these changes and our needs. Recommend wait-and-see position how FDLP changes, the reductions in the number of print fed docs, and arrival of print on demand technology impact our fed doc depository.
				
				Must ensure that our reliance on external sources is valid for the long term. Considerations relating to withdrawal from FDLP means include loss of entire fed collection, prestige of having a fed doc collection, potential for upset patrons, staff time spent	

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				listing/boxing docs, and updating the catalog. Also considerable # of fed docs are in state doc collection. Process/expense of their removal.	
Electronic journals	Some electronic journals may not be used enough to justify maintenance of the collection.	Reduce electronic journals subscriptions to a core of materials needed and used by clients.	Closely scrutinize renewals to see if they are duplicated with-in Infotrac or otherwise offered free through the internet.\n\nGather additional usage data for use in selecting journals for renewal.	Too early to ascertain if electronic journals will be used; however first indications are that they generally are not (with the exception of individual subscriptions). Need more data..	
Reference	Reference services are seldom utilized for significant research directly related to MSdL issues.	Reduce time spent on non-significant and non-related reference questions.	Use clerical/technician staff to triage questions. Refer difficult questions to MLS staff. Refer non-related questions to appropriate help.\n\nRefer clients to on-line systems and help as appropriate.\n\nConsider discontinuing staffing of reference desk.\n\nInvestigate sharing reference responsibilities.		
Public space	Inefficient use of existing space. Space is large for amount of use. Space is not well designed for collaborative study or private work areas.	Small area assigned for public use that efficiently meets needs of walk-in clients.	Formed building committee with representatives from all programs. Will consider:\n - Reduce size of public area to provide workspace for _____ individuals.\n - Replace existing work areas with tables, chairs and dividers that make more efficient use of the area allotted.	Security\n\nStaffing	
Public Access Computers	Too many computers; inefficient use of space and significant draw on support resources.	Few, easily maintained computers provided for public access.	Review PAC use to determine how many are needed.\n\nEvaluate maintenance needed;	Inability to monitor patron use of PACs.	

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	Non-clients using resources.		automate maintenance procedures as possible. Redesign space. Group PACS together. Reposition ref desk for better view of patron activity		
Assimilation/ Management – Define collection, both in-house and external; define information flow; identify management systems and protocols. Assimilate selected data and information in house; inventory relevant external data and develop necessary links or pointers. Index and catalog information resources. Prevent loss of electronic data and information.					
Collection Plan	The MSdL "collection" is not clearly defined.	Clearly define the MSdL collection, both in terms of the data and information to be assimilated in print and electronic format, and in terms of the data and information resources maintained elsewhere to be included in MSdL discovery, visualization and access tools.	Define internal collection. Identify external information resources to be included in MSdL discovery, visualization and access tools.		
State Publications - Electronic	Electronic state publications are not being captured and preserved. Publications are published in varied formats and structures. Standards for publication do not exist or are not being followed.	Develop cradle to grave system to publish, capture, organize, manage, index, catalog, store, and, as necessary, update the format of electronic state publications.	Develop plan, including: guidelines for agencies for electronic publishing; training agency staff; identification of specific publications of interest to MSdL; develop procedure for capturing publications; develop storage method; develop update procedures; develop archive protocol and procedures. Revise current state publications center law.	No common concept of "publication" in electronic context. Multi-agency functions and duties associated with certain types of electronic documents. Commercial electronic document management systems not tried and tested for this purpose. Must plan for evolution of storage standards and methods.	
State Publications – Print	Maintenance of state documents center mandated in statute. Not all print state publication are being sent to MSdL for public access. Large # older than 30 years	Capture all print publications that are not available in electronic format.	Obtain measure of significance of problem. Increase outreach to agencies. Attend agency staff meeting to assess their information needs. Offer presentation on available MSdL info resources.	Must resolve question of need to capture both electronic and print when both formats are available. Large # older than 30 years eligible for transfer to MHS. Time/expense of transfer? Ability of MHS to receive large	

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	eligible for transfer to MHS.		Evaluate system currently in place for obtaining copies.	transfer?	
Electronic information loss prevention	Much electronic information, especially that which is presented via web pages, is at risk of being lost when web pages are updated or taken off line.	Prevent further loss of electronic information while responsibilities are being determined and systems are being developed to properly manage such content.	Work with Illinois State Library to implement their approach to capturing web content in a "safety net" database for possible future access. Develop plan, including: - Identify domains to capture; - develop contacts in all agencies; - with contacts advice and support, refine spider protocols for all domains; - set up server, storage and backup; - install and configure software; - routinely monitor safety net database and resolve problems; - mine data on request; - monitor progress of ISL toward search interface and consider implementation when available; - act as liaison with PEP committee;	What does this project offer MSdL and its customers? Possible downside – detracts from other duties, may not result in a product that has immediate use, places MSL in the position of doing a project that relates to the concerns of other agencies (e.g. secretary of state). Upside – relationship with major library with resources to do research and development; learn about resource needs, evaluate our ability to support such a system; low cost; no long term commitment.	
Web content management/update system	Maintenance of static web pages is time consuming and generally must be done by technical staff. As a result, pages tend to get outdated quickly.	IMplement system for managing web content that allows MSdL non-programming staff to routinely update web content.	Investigate content management systems available, including commercial products as well as product developed by FWP for internal use.		
Information transfer agreements/protocols management	Information sharing with other agencies is informal in many cases and is not handled in a standard way with all agencies.	Formal information sharing agreements with all data source agencies, specifying data, frequency of transfer, methods, contact persons, etc.	Inventory information resources against collection plan. Identify transfer methods and protocols for each. Determine format and content of data sharing agreement. Work with source agencies to implement.		
Indexing, Cataloging	Not all MSdL information	Adequate metadata is provided or	Evaluate all information resources for	Possibly need electronic resource	

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and Metadata development	resources are represented in MSdL information discovery tools. Metadata is not maintained on all information resources. Current catalog search often results in too much retrieval; too little accuracy.	developed in-house for all MSdL information resources. Information resources are referenced in all appropriate discovery tools. Catalog retrieves records in context with user needs.	adequate metadata. Identify appropriate information discovery methodologies for each information resource. Evaluate all MSdL content for possible inclusion in catalog. Develop means to track non-standard information resources in catalog.	librarian to manage catalog, electronic journals, other resources (licenses, contracts, negotiations).	
Discovery/ Visualization/ Access – Ensure appropriate pointers to MSdL from external websites, publications, etc. All holdings cataloged per standard library protocols. Provide a set of integrated information discovery tools that provide relevant results. Enable visualization based on geographic reference, period of record, range of values, density of datasets. Enable users to easily obtain data and information based on user-defined selection criteria. Provide data and information bundling based on user categories. Consider push technologies to proactively provide users with data in accordance with specified needs. Assist users in locating data and information.					
MSdL Web presence	Web pages are not easy to use. Lack of integration across MSL programs. High level pages do not focus on information discovery.	Design home and top level pages that effectively integrate all digital library resources and provide discovery tools that cover all information resources.	Building on work completed to date, mock up home page and top level pages for multiple approaches to information. Conduct usability tests.	Considerations for use of logos – MSL, MSdL, NRIS, LISD, NHP.	
On-line Tools	MSdL does not have an integrated set of information discovery, visualization and access tools. Current tools are not easily understood and used.	Information in the MSdL "collection" is easily discovered by all users using multiple methods and approaches. Users are able to visualize geographic extent, relationships between datasets, and possibly amount of information available, period of record, range of values, etc. Users are able to easily obtain data and information diesired.	Define the core set of on-line information discovery tools (Catalog, web site, Digital Atlas, journals management system) and plan for better integration of these tools. FindIt/GILS – Investigate if GILS is viable discovery option. Geospatial data discovery – Implement a geospatial data metadata server (existing FGDC Metadata Grant). Consider building on the digital atlas	May need three or more approaches to information – subject oriented, program oriented (e.g.NRIS/NHP/WIS), perhaps media oriented. Combos of above. Is GILS a viable approach to information discovery, given the resources needed in house, the agency cooperation needed? Given the alternatives available, do the benefits of GILS justify the approach?	

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			concept. Look beyond the Atlas as currently defined– perhaps include all geographic content under this heading (map library, publications related to a specific place, etc.) Conduct usability tests.		
Information Brokering	Staff members are not experts in the content of information resources held in other agencies, including universities and colleges.	Staff members are knowledgeable brokers to information resources of use to our clients but maintained by others.	Determine which staff positions need to be experts in external data and information resources. Assign agency information resources to staff.		
On-line Reference	Clients must have access to reference assistance. With consideration being given to discontinuing staffing a reference desk for walk-in users, consideration must also be given to instituting on-line reference services	Clients have access to reference services as needed.	Work with MLN to determine place for MSL in network's on-line reference. Possibly implement stand-alone on-line reference system at MSL.	Does MSdL have the staff available at this time to contribute to the MLN joint project?	
ILL	ILL will continue and possibly grow as a means of access to MSdL information.	One-day turn-around on ILL requests			
Mediated requests	On-line tools do not provide adequate information access to all users. Staff assistance will continue to be necessary.	Staff are available to assist in data and information discovery, assimilation, summarization, report development, map production.	Investigate overlap between CMS and VR to determine a common CMS for MSdL users.	Requests through NRIS are managed through a home-grown customer manager system.	
Content Development/ Adding Value – Integrate, augment, mine data sets to highlight, support and extract useful information. Maintain historical record through periodic snapshot of selected data sets or other appropriate means. Develop products based on the information resources of MSdL.					
Content enhancement and development	Much can be gained through integrating raw datasets and disparate data sources, combining them in new ways, extracting information based on unique combinations, etc. MSdL is uniquely positioned to do so for government information.	MSL adds value to the data and information assimilated whenever possible.	Identify areas of potential for mining information sources for related information in anticipation of need; better methods to present agency information that integrate disparate sources; increase data visualization opportunities; create almanac. (Closely linked to MSdL Web		

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			development.) Evaluate the benefits of increasing: - Map production / Cartography - Information summarization/ reporting - Data mining/ interpretation		
Map library	The ability to access simple state maps has been one of the more popular aspects of the NRIS website. Until recently, this access was limited to the set of statewide maps prepared for other purposes, having no standardized appearance.	MSdL offers a comprehensive series of statewide, county and watershed maps for viewing on-line, printing, or inserting into documents and presentations.	Add more themes for current geographic areas; consider adding new geographic areas. Capture temporal aspect of selected datasets. Develop archive system.		
Outreach/ Training/ Marketing – Promote recognition of MSdL as a primary point of access to Montana government information and information needed by government officials. Ensure users are able to effectively utilize MSdL information resources and tools. Set standards for electronic publications and for exposing electronic data for access.					
Standards and Protocols	Electronic information is not developed, managed or published using standardized methodologies that enhance collection, management, discovery, or use. Guidance, templates, protocols, and tech support are needed for state agencies providing direct access to agency data via the Internet (e.g. web services, electronic documents) to ensure a common state approach.	Develop standards and provide training relating to: - Electronic Document Publication - Web Services (how to expose databases and GIS coverages) - Geospatial Metadata Development - Metatagging Electronic Documents - Optimizing Websites for information discovery - Serving dynamic content			
Web-based tutorials	Web-based tools are often difficult to use for first time users.	Comprehensive set of tutorials for all information discovery, visualization and access tools.			
Workshops/Seminars				LISD workshops are well-attended – should they be offered state-wide through other delivery methods.	

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				NRIS seminars are well attended, but currently deal with a broad range of topics crossing agency lines. Should these focus more on internal topics?	
Marketing	Users must recognize MSdL as an effective information resource. Policy-makers must recognize MSdL as a useful and cost-effective resource deserving of adequate funding.	Adequate long-term funding. Recognition as the place to go for state-agency and related information. High level of use	Market objectives need to be defined and specialized services developed to meet these objectives.		
Presentation materials/ fact sheets					
Staffing – Fill open positions with staff having significant skills that reflect the projects identified above.					
Library Information Resources Section Manager	Current manager will retire June 30, 2004.	Hire ASAP	PD revision complete. Recruitment to begin April 26, 2004		
Information systems support specialist	Section currently has no dedicated IT support. NRIS IT staff are not able to serve information systems support needs of this section. Information systems support needs will grow.	Hire ASAP	PD development in process. Begin recruitment May 10, 2004, with intent to fill position by June 30.		
Open position			Hold off on filling third open position until manager is hired and MSdL program is better defined. After the manager and the IT support FTE is on staff, we will work closely with them to define the needs of the division - reference librarian, electronic collection manager, cataloger – other?		