Memo

To: State Library Commission

From: Darlene Staffeldt, State Librarian

Date: November 9, 2009

Re: Budget for Library Services Technology Act (LSTA) funds for FY2010

We have not yet received the official notification of the annual federal funding that will be coming to Montana. The LSTA allotment for 2009 was $1,104,574. We anticipate that the 2010 allotment will be the same.   This is not an action item at this time but a first look, please let me know if you have any suggestions or changes to recommend.

We will be recommending the LSTA budget based on the following criteria:
- Recommendations from the Network Advisory Council (NAC).
- Projects address the six LSTA priorities for funding (I have attached a copy of these at the end of this memo) ;
- The proven statewide impact of each existing project;
- Staff resources available for project management;
- Sustaining worthwhile current projects;
- Importance of the project based on the library community's comments during the long-range planning process; and
- Possible innovative new projects which will help us meet the goals of the long range plan.

Based on the NAC's discussions to this point, these suggestions for us of anticipated FY2010 LSTA funds represent a continuation of an overall approach to statewide projects and a desire that Montana Libraries be encouraged to move forward in particular directions, over the next several years. Those approaches and directions are:
- The continued growth of a statewide shared catalog;
- The implementation of the concept of "Integrated Discovery Systems" statewide;
- Continued, new efforts to meet the library user where he/she lives, works and recreates;
- Significant growth of a statewide delivery system for all types of library materials.

The following represents projects that are currently being considered for recommending for funding:

	LSTA Priorities Met	FY2009 Budgeted	FY2009 Revisited Budget	FY2010 recommended Total Budgeted	Balance
LSTA FY2010 Total anticipated				**$ 1,104,574.00**	
Administration		$69,427.00	$69,427.00	$44,183.00	**$1,060,391.00**
LSTA Oversight				$32,744.00	**$1,027,647.00**
Talking Book Library	4,5,6	$189,468.00	$189,468.00	$189,468.00	**$ 839,179.00**
Montana Shared Catalog	1,2,3,4,5	$163,735.00	$163,735.00	$164,259.00	**$ 673,920.00**
New MSC Libraries	1,2,3,4,5	$153,961.00	$153,961.00	$ 75,000.00	**$598,920.00**
Statewide Collaborative Access	1,2,3,4,5	$278,208.00	$219,097.00	$272,890.00	**$ 326,030.00**
Statewide Collaborative Content	2,4	$117,817.00	$117,817.00	$149,691.00	**$ 176,339.00**
Statewide Collaborative Programming	1,4	$20,000.00	$20,000.00	$25,226.00	**$ 151,113.00**
Network Advisory Council	5	$7,500.00	$7,500.00	Included with LSTA oversight	
Fall Workshop	1,2,5	$20,000.00	$20,000.00	$20,000.00	**$ 131,113.00**
Early Learning Statewide Initiative	1,4,5,6,	$18,500.00	$18,500.00	$18,500.00	**$ 112,613.00**
WorldCat Local	1,2,3,5,6	$26,258.00	$49,458.00		
MontanaLibrary2Go	1,2	$19,500.00	$19,500.00	Included with Statewide Collaborative Content	
HeritageQuest	1,2	$15,000.00	$15,000.00		

MSL Marketing	1,4,5,6	$5,200.00	$5,200.00	Included with Statewide Collaborative Programming
Long Term Access/Preservation Solution		$15,000.00	$10,000.00	**$ 102,613.00**
Montana Memory Project Support Position		$6,082.00		
Unassigned		$14,829.00	$102,613.00	

PROJECT BRIEF DESCRIPTIONS:

Administration:
Project description: This project includes the statewide cost allocation plan (indirect costs) payment and partial salary for Central Services staff.

LSTA Oversight:
Project description: this project includes partial salary for the Coordinator as well as costs for the Network Advisory Council.

Talking Book Library:
Project description: This project includes the Talking Book Library (TBL) program. Included are partial salaries for six TBL employees as well as a small amount of operational funds for these positions. This project addresses goals 4, 5, and 6 of the LSTA priorities.

Montana Shared Catalog:
Project description: The Montana Shared Catalog (MSC) is a voluntary consortium comprised currently of 90 libraries. Project costs include partial salary for one MSC support position as well as full salary for the MSC Director position, and the MSC technical support position. Additional support is included to cover growth-related costs associated with the Sirsi-Dynix Symphony system upon which the MSC platform is built. The project addresses goals 1,2,3,4, and 5 of the LSTA priorities.

MSC New Libraries:
Project description: Pending final application process and confirmation from each library, new libraries will be added to the Montana Shared Catalog's SirsiDynix system. Data conversion and migration costs will be paid for by this project. This will bring the Montana Shared Catalog statewide consortium to a total of XXX libraries. The project addresses goals 1,2,3,4, and 5 of the LSTA priorities.

Statewide Collaborative Access:
Project description: The goal of this project is to make it possible for Montana libraries to work together and share resources. To accomplish this goal, the project will coordinate access to electronic resources, facilitate access to OCLC tools, maintain directories, and continue work to establish a statewide cooperative online reference service. State Library staff will research and demonstrate promising technologies and practices to provide better statewide access. This project includes the salaries for Montana State Library's three Statewide Technology Librarian positions and expenses for the statewide OCLC group purchase, Ask Montana services, and other collaborative efforts. This project addresses goals 1,2,3,4, and 5 of the LSTA priorities.

Statewide Collaborative Content:
Project description: The goal of this project is to make it possible for Montana libraries to work together to share and expand upon the resources available to all Montana citizens. To accomplish this goal, the project coordinates purchases of statewide electronic resources, helps build digital library content, continues work to establish a statewide cooperative audio books collection, and researches and demonstrates and/or tests promising technologies, collections and practices. This project includes the salaries for two statewide projects staff and partial funding for MontanaLibrary2Go.   This program meets goals 2 and 4 of the LSTA priorities.

Statewide Collaborative Programming:
Project description: This project helps public libraries offer programming and other services for a targeted audience group by providing materials, ideas, and web resources. LSTA funds are used for the part-time salary of the project coordinator, plus some production money for developing project materials. This project also promotes summer reading program activities provided statewide by contracting with a children's librarian to represent Montana at the annual Collaborative Summer Reading Program meeting and purchasing program manuals for all public libraries each year. This project meets goals 1 and 4 of the LSTA priorities.

Network Advisory Council:
Project description: The Network Advisory Council (NAC) is the advisory body that provides direction for the Montana State Library, and advice to the State Librarian on all things related to library cooperation, resource sharing, online content and services, and library access, content and programming. This project pays expenses for NAC members to attend meetings as called each year. This project addresses goal 5 of the LSTA priorities. For 2010 budget this project will roll into the LSTA Oversight program.

2010 Fall Workshop:
Project description: The 12th annual Fall Workshop will be held in September 2011. It will be a 2-day training event with no registration fee to be attended by librarians from all types of libraries from all parts of the state, and will feature half-day sessions on a variety of topics while providing librarians an excellent opportunity to network. LSTA funds are used for presenter fees, meeting facilities, materials, etc. This project meets goals 1, 2, and 5 of the LSTA priorities.

Early Learning Statewide Initiative:
Project description: This project will be launched as part of the Ready 2 Read Campaign by coordinating and implementing a statewide early literacy effort in at least 45 Montana public libraries. The effort will include a survey of current public library offerings to families of young

children age 0-5, a collection of board books, parenting materials and other resources for this age group, consulting provided by a local children's librarian and Ready 2 Read publicity materials. The project addresses goals 1,4,5 and 6 of the LSTA priorities.

WorldCat Local:
Project description: This pilot will test WorldCat Local across a small, limited group of libraries. WorldCat Local gives users the ability to interact seamlessly with the WorldCat.org resources and a local library's services such as circulation, resource sharing, full text and local digital collections, in a one-stop user discovery experience. This project addresses goals 1,2,3,5 and 6 of the LSTA priorities.

MontanaLibrary2Go:
Project description: 35 libraries are currently participating in this statewide consortium, offering their patrons a shared collection of downloadable E-content from OverDrive, Inc. New libraries are added quarterly, with startup and ongoing costs based on a local cost sharing formula. The total collected is committed to collection growth, which is managed and budgeted for by a statewide selection team. OverDrive's yearly "hosting fee" and "new library participation fee" for up to 5 new libraries will be paid for by this project. This project meets goals 1 and 2 of the LSTA priorities. For FY2010 budget this program will roll into the Statewide Collaborative Content program.

HeritageQuest:
Project description: In September, 2008, contributions from 48 public libraries and LSTA funds enabled the purchase of a year's subscription to the online genealogy database, HeritageQuest Online, for all Montana public libraries. There was significant demand throughout the state for an online genealogy tool and the library and patron responses to this resource have been enthusiastic. The renewal price for HeritageQuest Online increases the subscription cost by 5%. This project will continue to help lower the overall cost of the subscription for public libraries. The project addresses goals 1 and 2 of the LSTA priorities.

MSL Marketing:
Project description: MSL will increase marketing support and materials to libraries for both new and ongoing statewide LSTA projects, including AskMontana, statewide databases and the Montana Shared Catalog. MSL will seek partnerships with other entities such as the Office of Public Instruction, Fish, Wildlife and Parks and Headstart to provide learning materials that are focused on Montana's natural resources and target ages 2-13. This project meets goals 1,4, 5 and 6 of the LSTA priorities. For 2010 budget, this project will roll into the Statewide Collaborative Programming project.

Monies unassigned (both FY2009 and FY2010) as of yet could go towards projects such as:

- Adding additional new libraries to Montana Shared Catalog

- HeritageQuest

- Additional Long Term Access/Preservation Solution monies

- Montana Memory Project support position

- Digital Long Term Access: OCLC Digital Archive subscription (cost share with certain participating libraries)

- Open URL resolver to build a statewide federated searching tool via WorldCat Local and other resources

- Test of OCLC's new web-scale management services (ILS): one or two libraries

- Pilot to help fund libraries' presence on hand-held devices (applications, services, webpages)

- Expansion of the courier pilot

- EZProxy for statewide central authentication (OCLC hosted).

- Others?

LSTA PRIORITIES FOR 2010 GRANT AWARD

1. Expand services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages;
2. Develop library services that provide all users access to information through local, state, regional, national, and international electronic networks;
3. Provide electronic and other linkages between and among all types of libraries;
4. Develop public and private partnerships with other agencies and community-based organizations;
5. Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, to individuals with disabilities, and to individuals with limited functional literacy or information skills; and
6. Target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children from families with incomes below the poverty line.