



Federation Annual Report FY 2013 July 2012 Through June 2013

SIGNATURES

Federation	Broad Valleys	
Coordinator's Library	Lewis and Clark Library	
Coordinator	Judy Hart	
	Signature _____	Date _____
Chairperson - Board of Trustees	Sandra Conrady	
	Signature _____	Date _____

The Coal Severance Tax (CST) Revenue Accountability Report System requires the Federation Annual Report. The report relates to the Plan of Service, which was adopted at the beginning of the fiscal year as a planning document.

AWARD/EXPENSE SUMMARY

Total CST Award: \$36,752.00
Total CST Expended: \$36,752.00

EXPENDITURES BY PROGRAM

Program 1 - Continuing Education/Annual Meeting	\$4,872.00
Program 2 - Continuing Education Grants	\$9,672.00
Program 3 - Technology and Resource Sharing	\$21,408.00
Program 4 - Book Discussions in a Bag	No member expenses for this program

Program 5 - Administrative Services

\$800.00

Total: \$36,752.00

EXPENDITURES BY LIBRARY

Library	Status	Total Award	Award Expenses	Local Expenses
Belgrade Community Library	Active	\$1,480.00	\$1,480.00	\$0.00
Boulder Community Library	Active	\$1,480.00	\$1,480.00	\$626.22
Bozeman Public Library	Active	\$1,480.00	\$1,480.00	\$2,674.49
Broadwater School and Community Library	Active	\$1,480.00	\$1,480.00	\$944.22
Butte-Silver Bow Public Library	Active	\$1,480.00	\$1,480.00	\$1,841.00
Dillon Public Library	Active	\$1,480.00	\$1,480.00	\$1,185.49
Drummond School & Community Library	Active	\$1,480.00	\$1,480.00	\$428.68
Hearst Free Library	Active	\$1,480.00	\$1,480.00	\$0.00
Lewis and Clark Library	Active	\$7,152.00	\$7,152.00	\$24,567.48
Livingston-Park County Public Library	Active	\$1,480.00	\$1,480.00	\$1,480.00
Madison Valley Public Library	Active	\$1,480.00	\$1,480.00	\$0.00
Manhattan Community School Library	Active	\$1,480.00	\$1,480.00	\$0.00
Meagher County/City Library	Active	\$1,480.00	\$1,480.00	\$0.00

North Jefferson County Library District	Active	\$1,480.00	\$1,480.00	\$0.00
Philipsburg Public Library	Active	\$1,480.00	\$1,480.00	\$147.00
Sheridan Public Library	Active	\$1,480.00	\$1,480.00	\$128.32
Thompson-Hickman County Library	Active	\$1,480.00	\$1,480.00	\$772.08
Three Forks Community Library	Active	\$1,480.00	\$1,480.00	\$2,750.00
Twin Bridges Public Library	Active	\$1,480.00	\$1,480.00	\$741.54
West Yellowstone Public Library	Active	\$1,480.00	\$1,480.00	\$0.00
William K. Kohrs Memorial Library	Active	\$1,480.00	\$1,480.00	\$0.00
	Totals:	\$36,752.00	\$36,752.00	\$38,286.52

PUBLIC VALUE SUMMARY BY PROGRAM

Program 1 - Continuing Education/Annual Meeting

Narrative

This program supports Goals #1 and #2 of the Broad Valleys Federation

Annual Meeting – Members voted to continue meeting once a year for a two-day meeting, location of which is within the boundaries of the Federation. Retreat will include a minimum of two continuing education workshops. Goal: to increase library trustee attendance by 10%.

The Lewis & Clark Library will coordinate and pay for the costs of lodging, meals and continuing education presentations. As costs have risen and there is higher attendance at the retreat, the Federation approved an increase to cover retreat costs. The Lewis & Clark Library will receive up to \$4,872 to pay for this service.

Unexpended funds from any program may be redirected. Remaining funds may be used to secure additional

continuing education /professional development opportunities, online databases, MontanaLibrary2Go, book discussion kits, or technology that benefits the Federation.

Public Value

We have two new trustees this next year and have a designated federation representative on the Board. We hope to get a better turn out this year. We plan to do some education on the roll of federations during Board meetings this year.

When we attend these meetings, we try to learn what new things the shared catalog is doing. It helps us give more to our MSC patrons. We also give input on the changes to the by-laws.

By going to the conference my board members get much needed direction. They get this through the workshops that are provided. For me, I learn new things to offer my patrons and they help me earn credits for my certification.

One of the most anticipated events for the BVF, the annual meeting is an opportunity for member librarians and trustees to network, take advantage of continuing education, and conduct our annual business meeting. The new fiscal year Plan of Service is discussed and approved.

We have continued to offer two continuing education tracks, one for librarians and one for trustees. Trustee participation has been significant thanks to these professional development opportunities. Each member library has the opportunity to provide the group with highlights, news, challenges and accomplishments experienced over the past year.

Retreat agenda and continuing education offered in FY 2013:

BROAD VALLEYS FEDERATION SPRING MEETING

March 1-2, 2013

Finlen Hotel

100 E Broadway - Butte, MT

AGENDA

Friday, March 1, 2013

9:30 – 10:00 Welcome, Introductions, and Logistics

COMBINED SESSION FOR TRUSTEES AND LIBRARIANS

10:00 – 12:30 Roberts Rules of Order = Excellent Meetings – Tracy Cook (Montana State Library Consultant)

This interactive session introduces participants to the Rules in a fun and engaging way. Through practice and with a good reference in hand, attendees will learn how orderly structure can facilitate productive meetings.

CE Category: Library Administration

12:30 – 1:30 Lunch

AFTERNOON SESSIONS

FOR TRUSTEES

1:30 - 3:00 21st Century Libraries – Suzanne Reymer (Montana State Library Consultant)

Some people say, libraries are no longer relevant in a digital age where information and resources are available instantly. In this workshop, we'll look at ways to keep your library relevant and connected to your community.

CE Category: Technology

3:00 - 3:30 Break

3:30 – 5:00 21st Century Libraries (Con't) – Suzanne Reymer (Montana State Library Consultant)

FOR LIBRARIANS

1:30 – 3:00 Genealogy Online – John Heldt (Reference and Information Services Librarian, Lewis & Clark Library)
Discover your roots through Ancestry Library Edition, Heritage Quest, Access Newspaper Archive, Newsbank, and other electronic resources. Participants will have the opportunity to search for 1940 U.S. Census records, obituaries, and more in this 90-minute hands-on session. Bring your laptops!

CE Category: Technology

3:00 – 3:30 Break

3:30 – 5:00 A Digital Literacy Primer – Jo Flick (Montana State Library Trainer)

What does the term "digital literacy" mean? What is the role of libraries in promoting a digitally literate community? This session will explore the term within the context of the library's role and outline the many national initiatives on digital literacy that are providing resources and promotion of value to librarians. Participants will discuss their own library's activities- present and planned - to promote a digitally literate community and state.

CE Category: Library Services to the Public

5:00 – 6:30 Hotel Check-in – Social hour

6:30 Dinner

Aprés Dinner Entertainment – The Sweat Tea Dancers

Saturday, March 10, 2012

8:00 Light Breakfast PLEASE CHECK OUT OF YOUR ROOM AFTER BREAKFAST

9:00 – 12:00 BUSINESS MEETING

Minutes – FY2012 Spring Meeting

Election of Officers for FY2014

FY2013 Plan of Service Review

FY2014 Plan of Service Development
Continuing Education Topics for FY2014
Federation By-Laws – Action Item

State Library's Report – Jennie Stapp, State Librarian or her representative

Individual Library Reports

Wrap-up and adjourn

12:00 Lunch and hit the road!

Because meals and lodging are covered by Federation funding, all member libraries are able to participate. Many member libraries have little or no budget for travel and training.

Fulfills goal of statewide resource sharing.

The state library fall meeting provides the staff with ongoing meetings and classes to keep us "up to speed". They provide a lot of information for our library to maintain and anticipate what is required of the public libraries. Wonderful classes for staff improvement is provided by the staff and special guests.

This is a yearly gathering of the libraries that are in the Broad Valleys federation. The board gives us the pertinent information for ongoing requirements for the upcoming year. Financial information is discussed and some specialized workshops are provided.

The remainder of the funds is applied to this yearly meeting fees for registration and expenses. This conference has always been an incredible conference that provides many workshops for technology, administrative, and community-minded benefits. The large number of people attending lend inspiration and support for each other. The learning, and even brainstorming, always provides valuable tools to return to the library with.

Program 2 - Continuing Education Grants

Narrative

This program supports Goals #1 and #2 of the Broad Valleys Federation. Each library will receive a direct grant of \$470.00 to be used to provide continuing education to librarians and trustees, at the discretion of each individual library.

Unexpended funds from any program may be redirected. Remaining funds may be used to secure additional continuing education /professional development opportunities, online databases, MontanaLibrary2Go, book discussion kits, or technology that benefits the Federation.

Public Value

Keeping up with technology is one of the great challenges for librarians today. With a diminishing travel budget, funds to help the Director travel to conferences to keep up with technological trends is essential.

The Broad Valleys Retreat offers opportunities for networking among area Librarians. As a rural librarian with a small staff, visiting with other like librarians helps alleviate professional isolation. Along with workshops for continuing

education credits, there is a business meeting to plan how we want to spend the Federation grant that is awarded by the State. As a group we take this task seriously and arrive at consensus decisions that assure we obtain the optimum value for the money we receive.

The library will be able to offer more computer classes to the patrons because we will be better informed on copyright laws, QR Codes, digital privacy, etc. We will also be able to make the library a friendlier place for patrons of all ages. Staff members learned cataloging, how to make a family friendly library, Montana History in a Digital format, young writer's groups in the library, cultivating readers through the radio, programming for school-age children, how to work with the media, and work safety. Without this money two members of our staff wouldn't be able to attend this training. I attended to earn CE credits so that I can recertify at the end of 2013. Work shops were very informative. Net working and seeing old friends was wonderful.

Training is beneficial for staff especially when it has to do with technology. We really got the biggest bang for our buck this year by hosting Offline. I am glad we were able to still send some of our staff to MLA because it was costly for us to send so many to Offline. But how could we not send them to the tech conference in their own town! We are very grateful for these opportunities for training provided by MLA and I think our staff gets a lot out of meeting other librarians from around the state.

Continuing education is crucial to all library staff. It helps update all attendees on the latest technology, resources, and techniques that are available. Each person who attends the annual conference or other training opportunities brings that new knowledge back to their co-workers and to their daily job tasks. This results in improved service to the community.

1) This is the second year the same library trustee attended the Broad Valleys spring meeting. He re-connected with other trustees; exchanged ideas and contact information; learned more details of library operation, staffing, and issues; came back and shared with the rest of the library board details concerning the Federation. He was interested to learn and shared the important role trustees serve in voting for or against various issues and how trustee attendance is vital to conducting business at the meeting.

Of particular interest to the Director was the refresher on Roberts Rules of Order. The session provided information in a format that can be referred to at a later time as needed.

The Director returned to the library with an information sheet from the Genealogy/Ancestry session and provided this to the patron instructing a Genealogy class at the library. Patrons who attended the class were able to use this information at the library as they continued their own hands-on learning about the Ancestry program. The Director also assisted a patron one-on-one using information from this session.

2) This MLA session provided an update in so many areas of library services:

- 1) What libraries are doing to create family-friendly areas (the Director will be listening closely to what parents want and continuing to implement changes)
- 2) The Future of OCLC cataloging and ILL Discovery session (Director talked with the library board about future changes and completed OCLC training to prepare for the First Search transition)
- 3) Montana Shared Catalog Learning Portal (this interface will save time by having available training centralized in one location with easy access to webinars and videos with download capability)
- 4) Creating Enhanced E-Content session's content the Director was completely unfamiliar with and provided ideas to experiment with in displaying photos of this year's summer reading program
- 5) Latest in Internet Filtering increased awareness of laws and procedures.

Again it cannot be emphasized enough that being able to attend these sessions provided information which will be applied over and over again in day-to-day administration of the library. Without this information we would only minimally not effectively meet patron need.

By attending the conference I was able to attend several very interesting and helpful workshops to better my customer service to my library patrons, learn more about technology advancements at several levels and increase my awareness of new products and services available for my library. I also have enough Continuing Education credits to renew my Library Certification in 2013.

Service to patrons for audio and print devices to be heard or read from technological devices.

Board Chair and story hour/ summer reading program volunteer gained knowledge for both activities.

Mitch attended training sessions relating to the operation of the library.

As a stakeholder, being present at the MSC meetings is the only way to vote on important issues that frame the staffing, goals and budget of the consortium. In addition, I represent the Montana Shared Catalog consortium on the Network Advisory Council. Therefore, it is essential I am up to date on changes and discussion in order to best represent my colleagues on the NAC Council.

cataloging skills

At the conference, I was able to attend various workshops to aid in serving the public patrons, working with local government, and maintaining the collection for our library. The state conference is an incredible opportunity to network with other librarians and share ideas for improving libraries across the state.

The benefit of attending the MSC meeting, is huge for a small library like mine. To participate in the a consortium of over 130 libraries is amazing - to watch the various entities work together to make the organization stronger only helps to make each individual library stronger.

Diane and I were able to share resources to attend the Shared Catalog Meeting in Miles City. My School district paid for the lodging, her district paid for some of the travel costs and it is fitting that I am able to use a small amount to help with travel costs. While at the meeting, I was able to sit in on a session about Montana Library2Go.

Understanding this service will benefit my patrons as well as library users in a nearby community who are eager to learn about downloadable materials.

Staff attendance to various workshops and training sessions enhances their current positions in addition to providing better service to our library patrons

The benefit of staying in Miles City for the meeting was that it allowed me to attend the Birds of a Feather meeting prior to the membership meeting as well as a chance to network with other librarians and to work one on one with the director of the Missoula County School District's director to gain understanding of MSC Reports, school policies, and curriculum connections.

The benefit of staying in Miles City for the meeting was that it allowed me to attend the Birds of a Feather meeting prior to the membership meeting as well as a chance to network with other librarians and to work one on one with the director of the Missoula County School District's director to gain understanding of MSC Reports, school policies, and curriculum connections.

Continuing education stipends are applied in order to strengthen the Federation structure, encourage continuing education for librarians and trustees, and provide excellent library services to Montana citizens.

Lewis & Clark Library staff and trustees were able to take advantage of a variety of high quality, valuable professional development opportunities. The MLA Conference is an important part of our library's continuing education plan. From creating eContent for Your Library, to Discover It!, Laws You Need to Know, and the Latest in Internet Filtering, staff and trustees attended sessions that applied to their work and learning goals, ultimately benefiting our community. We all attended an excellent Roberts Rules training by Tracy Cook. Both I and the board member who were there are pretty proficient in Roberts Rules--but we both learned quite a few things we didn't know!! Lots of great questions and discussion among the libraries. We brought back what we learned and had a good talk at the next board meeting.

My board members attended the genealogy track and the digital literacy primer. They both are avid genealogists and walked away thrilled with all the new stuff they'd learned. Neither are techie--but asked if the library shouldn't get a kindle for check out so it helped them think differently about "library resources."

I took the 21st Century Libraries, and we had some really great discussions about library services and serving communities in creative and tailored ways.

My favorite part was being able to connect with libraries/librarians of all different sizes. To hear their problems, solutions, ideas, and thoughts--we are truly blessed to have such talent and passion in Montana libraries!!!

The benefit of attending our Federation meeting is to interact with librarians in my region and to gain understanding

of how to best serve our patrons. During the Librarian Track/CE portion of the retreat, I attended a session about using Robert's Rules of Order properly at meetings. This has not only benefited our library board but I have also used Tracy's handouts in other organizations in my community such as our Chamber of Commerce and Hospital Foundation.

Continuing education and connection to other libraries in the federation.

Attendance at the Montana Library Association helps to alleviate the professional isolation of a small, rural librarian. The Conference provides continuing education credits for the librarian, which is necessary for the director's certification. Vendors at the conference provide opportunities to purchase discounted books for the Library without having to pay shipping costs. Many programming ideas for our Library come the conference.

Texts focusing on solo libraries will hopefully give lessons on better management, allowing me to better serve my patrons and community. Children texts will help me to modernize my collection.

The state library fall meeting provides the staff with ongoing meetings and classes to keep us "up to speed". They provide a lot of information for our library to maintain and anticipate what is required of the public libraries. Wonderful classes for staff improvement is provided by the staff and special guests.

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When we attend these meetings, we try to learn what new things the shared catalog is doing. It helps us give more to our MSC patrons. We also give input on the changes to the by-laws.

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Program 3 - Technology and Resource Sharing

Narrative

This program supports Goals # 2 and #3 of the Broad Valleys Federation. Each library will receive a direct grant of \$1,010. Monies will be used for technology related expenses. Emphasis will be on technology that strengthens federation-wide access. Additional emphasis will be on federation wide resource sharing and document delivery. Monies received in this category will be expended for such things as hardware, software, OCLC expenditures,

statewide database expenditures, virtual reference, and shared catalog expenses.

Each member library may designate some or all of their technology funds for Federation wide purchase of Heritage Quest.

Unexpended funds from any program may be redirected. Remaining funds may be used to secure additional continuing education /professional development opportunities, online databases, MontanaLibrary2Go, book discussion kits, or technology that benefits the Federation.

Public Value

Patrons will have access to books throughout the country and staff will be able to copy catalog MARC records with our enrollment in OCLC. Patrons and our local heritage center will be able to access genealogy records online. Belonging to MSC benefits our patrons by allowing them easy access from their home computers to place holds, renew library materials, peruse materials in our sharing group. Benefits staff members at the circulation desk. Follett is the library checkout system allows patrons to see and utilize the library catalog. OCLC allows the patrons of Broadwater School and Community Library the option of borrowing books and materials from all over the world. Our library can also share our collection with patrons from other libraries.

We need to participate in OCLC especially with the changes coming in the near future with the way we factor the cost sharing of OCLC, our continued use and participation in The Montana Memory Project and the new Worldshare for ILL. We are grateful for these funds to help us participate in OCLC.

We have several seeing impaired patrons and some older patrons that have difficulty reading the old keyboards. They have really helped those people. Everyone else likes them too.

One of the services we offer our patrons is the ability to use our printers. Either from the computers or people off the street that need to have something printed or copied. This keeps our patrons happy.

Continuing to participate in OCLC allows our Library to have more detailed cataloging records and more easily provide ILL services. Without this OCLC subscription, our staff would have much more work to do, some of which would certainly fall by the wayside due to time and staffing limits.

Participating in the Montana Shared Catalog affords the library the opportunity to obtain and loan material to patrons. We have won the respect of several patrons who walked in our door telling us no one has been able to locate the material they need. We tell them to give us a chance and with the exception of one request, we have placed the request and received their material. Many of our patrons read book series so when our library lacks a copy of the book in a particular series, we simply request it from another library within the state.

The system provides the information needed to quickly access material as requested. The impatient patron or one

who quickly comes in during their lunch hour can leave with their material in a timely manner. Having access to title and call number and additional information via the system enables us to provide the efficiency expected of us by our patrons.

The cataloging interface allows our library with one permanent staff to keep up with the large volume of books that are donated to the library. The ability to copy catalog is essential for us. We receive a large amount of donations and are able to quickly check items in the system to determine if our library wants to catalog these items or give them to Friends of the Library for our book sale.

The system generates a monthly transaction report which is shared with our county commissioners and city council and posted in our library to allow patrons access to information about their library. Statistics downloaded from the system are incorporated into a monthly Librarian Report shared with local government officials and kept on file at the library. This shared information supports fiscal year funding requests.

The fact so many libraries use these systems enables free exchange of information as needed between libraries. Federation wide sharing of material is greatly enhanced by having Federation funding provided to offset program costs.

I feel that is essential for my patrons to have the opportunity to access books from many other sources in Montana. By being a member of the shared catalog my patrons are able to access materials from member libraries throughout the state. It is my goal as a Library Director to fulfill every patrons needs. They may not walk out the door with the materials, but materials are ordered and will be available shortly. Both my patrons and I have come to rely on materials available through the shared catalog consortium.

Interlibrary loan makes a huge variety of items available to local patrons.

Patrons benefit by having access to materials throughout OCLC's online ILL system.

The Montana Shared Catalog allows our library to "grow" our local collections by adding thousands of additional resources, which are available through patron browsing or the help of one of our librarians. We are also members of the statewide courier service, which helps us deliver items patrons find on the computer that are owned by libraries out of our area (such as Butte, Missoula and Helena).

A Social Studies teacher and I are participating in the Concervation District's Women in Ag project which will for the Montana Historical Society and will be using the mic to conduct interviews. It is our hope to participate in the Montana Memory Project in the future. This will benefit our library patrons directly as well as interested people throughout the state who will find the interviews available to them through the Historical Society. This fits perfectly with our mission to help people know their heritage.

The new computers will benefit our patrons and the Federation by upgrading the current system which is no longer

robust enough for one tower to be connected to 4 keyboards and monitors. (The N-Computing system) Now, each unit will have its own tower. This will also increase security and privacy.

To assist in collection maintenance and records organization.

These sessions enhanced her current position as Circulation Department Head which helped provide better service to our library patrons as well as staff.

OCLC and services such as WorldCat (soon to be WorldShare) and full cataloging are invaluable to the sharing of resources. Interlibrary loan through WorldCat is a valuable tool and resource for our patrons, many of whom use the system to make ILL requests on their own.

MyMontanaLibrary2Go is one of the best things ever for small libraries. New patrons are completely blown away by it, and non-patrons become patrons in order to use it (and they probably never will ever come to the library--but they use this service every few weeks!!). It is the future--and we are grateful to be able to participate!!

Heritage Quest is a wonderful resource for serious genealogists as well as amateurs. People are excited when they realize they can access this resource from their home computer!

Provides our patrons with e-books and audio books to download from home free of charge to them.

Heritage Quest provides our patrons with genealogy resources.

Subscribing to the Montana Shared Catalog enlarges the borders of our library. MCSL patrons are able to access the online catalog anywhere they have an internet connection. This means they can browse the catalog, place holds and renew items online. We are also part of a sharing group and our patrons borrow books from Bozeman, Belgrade, Three Forks and West Yellowstone libraries. We in turn lend our books to the libraries in our sharing group. This benefits patrons all across the Gallatin Valley.

The OCLC subscription helps us to manage our collection with up to date information so can add new materials to our collection with ease. This saves valuable time and helps us to be more available to our patrons. Also, we still have some patrons who need to use Interlibrary Loan and we are able to offer this service through OCLC.

Dillon Public Library could not, as an individual library, afford an Integrated Library System (Sirsi Dynix) of the sophistication provided by the Montana State Library. Part of what we receive from the state is upgrades, technical support and training for our automated system. These are all services that would be unaffordable to us as an individual library. With diminishing local funds and increasing costs, it is imperative that we continue to maintain our participation in the Montana Shared Catalog.

Larger screen area for better low-vision access.

Downloadable e-content for rural patrons.

OCLC has always been a part of the library. WE use their resources in managing our collection.

Program 4 - Book Discussions in a Bag

Narrative

This program is originally a result of carry-over funds from FY2005 and now covers less-than-anticipated expenditures in all program areas. The Book Discussion in a Bag program was established in March of 2006 and is now being utilized by the members of the Federation. Unexpended funds may be used to purchase additional titles; Federation libraries submit their title suggestions and titles selected will be taken from this list.

Program 5 - Administrative Services

Narrative

Broad Valleys Federation of Libraries will provide to the Lewis & Clark Library a stipend of \$800, which will be used to defray the costs of coordination of the Federation activities

Public Value

The administrative fee covers costs of mailings, long distance calls and general BF business. With Federation funds we have been able to build greater participation in training for both trustees and librarians, provide networking opportunities, and promote resource sharing.