

Federation Annual Report FY 2014 July 2013 Through June 2014

SIGNATURES

Federation Broad Valleys

Coordinator's Lewis and Clark Library
Library

Coordinator Judy Hart

Signature _____ Date _____

Chairperson Sandra Conrady
- Board of
Trustees

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: \$36,878.50

Total CST Expended: \$36,878.50

EXPENDITURES BY PROGRAM

Program 1 - Continuing Education/Annual Meeting	\$4,998.50
Program 2 - Continuing Education Grants	\$9,397.80
Program 3 - Technology and Resource Sharing	\$21,682.20
Program 4 - Book Discussions in a Bag - Remove Program Four	No member expenses for this program
Program 5 - Administrative Services	\$800.00

Total: \$36,878.50

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	\$406.23
Bozeman Public Library	Active	\$1,480.00	\$1,480.00	\$9,831.82
Broadwater School and Community Library	Active	\$1,480.00	\$1,480.00	\$114.62
Butte-Silver Bow Public Library	Active	\$1,480.00	\$1,480.00	\$751.00
Dillon Public Library	Active	\$1,480.00	\$1,480.00	\$1,672.02
Drummond School & Community Library	Active	\$1,480.00	\$1,480.00	\$413.38
Hearst Free Library	Active	\$1,480.00	\$1,480.00	\$1,697.01
Lewis and Clark Library	Active	\$7,278.50	\$7,278.50	\$20,363.50
Livingston-Park County Public Library	Active	\$1,480.00	\$1,480.00	\$821.00
Madison Valley Public Library	Active	\$1,480.00	\$1,480.00	\$22.51
Manhattan Community School Library	Active	\$1,480.00	\$1,480.00	\$0.00
Meagher County/City Library	Active	\$1,480.00	\$1,480.00	\$783.46
North Jefferson County Library District	Active	\$1,480.00	\$1,480.00	\$0.00
Philipsburg Public Library	Active	\$1,480.00	\$1,480.00	\$0.00
Sheridan Public Library	Active	\$1,480.00	\$1,480.00	\$568.00
Thompson-Hickman County Library	Active	\$1,480.00	\$1,480.00	\$106.00
Three Forks Community Library	Active	\$1,480.00	\$1,480.00	\$763.24
Twin Bridges Public Library	Active	\$1,480.00	\$1,480.00	\$118.06
West Yellowstone Public Library	Active	\$1,480.00	\$1,480.00	\$1,377.00
William K. Kohrs Memorial Library	Active	\$1,480.00	\$1,480.00	\$410.00
Totals:		\$36,878.50	\$36,878.50	\$40,218.85

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 \$4,995.50 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

The annual meeting is highly anticipated by Federation members. In order to interest and involve Library Trustees, we have continued to offer a training track for Trustees. As a result we have higher participation by our Trustees. It is a great opportunity to network amongst librarians and trustees, earn continuing education credits toward certification. This year the Federation approved the By-Laws which had not been updated for some time.

Unexpended funds from any program may be redirected. Remaining funds may be used to secure additional continuing education/professional development opportunities, online databases, MontanaLibreary2Gop, book discussion kits, or technology that benefits the Federation.

Once again, excellent continuing education offered at the retreat: A very informative session for both librarians and trustees:

Library Finances – Funding, Sources, Accounting Reports, and What It Allo Means Miles Benton (Montana Department of Administration), and Lauren McMullen (Montana State Library)

Join MSL consultant Lauren McMullen and Miles Benton from the Montana Department of Administration for an overview of library funding and budgeting, including:

- the what and how of funding and revenue sources available to libraries
- budget laws including Title 7 of the MCA, Governmental Accounting Standards
- BARS (Budgetary Accounting and Reporting System)
- how to read the reports the city or county sends to the library
- Library Depreciation Funds and benefits to the library
- and some quick and easy budgeting tips

Another session address the world of shared applications online for work that is ever expanding and dynamic. Workplace Applications which explored some of the most widely used apps from Google, Sky Drive, and iWork. Attendees brought their iPad, smart phone or tablet for a hands on session.

State Library staff provided an overview of the Montana State Library Online. Participants learned about entering their federation expenses in the Directory, the MSL Learning Portal, the new Statewide Library Resources Portal and more.

The final session was a Strategic Planning Panel the provided an overview of popular strategic planning models for libraries, and what model would work best for a particular library. Models presented were the Five Questions model, the Scorecard Model, and the Planning for Results model.

The Federation conducted their Business Meeting, approving the FY 2015 Plan of Service, the revised Federation By-Laws and elected officers for the upcoming fiscal year. Members also discussed ideas and needs for continuing education topics for future meetings.

Applying funds to the growing demand for MontanaLibrary2Go content will provide increased access to E-materials and decrease wait times for materials.

This was a wonderful opportunity to meet some of the new library directors and board members in our Federation. Being able to introduce myself, put faces with names, and talk over issues with other libraries is such a vital part of collaboration and progress! I also really appreciated the detailed information about budgets and the BARS system. I learned a ton that I didn't know and feel much more comfortable with how our county accounts work and how our budget is arranged.

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

Beforehand, the Director visited with all six employees. Staff chose the sets of three hour classes they felt would best compliment their position at the library. This was the first time four of my six staff attended statewide training. Each staff person wrote up a summary of their classes explaining the benefit they received from the training day This was a terrific opportunity to help staff 1) be exposed to statewide training and librarians 2) receive continuing education credits, which help attain their goal of being certified

under the Montana State Library and 3) begin to learn the value of networking with other librarians in Montana. Thank you!

Continuing Education for the Library Director. Networking with other librarians and affiliates.

Continuing Education for staff.

Without the federation money the library couldn't afford to send the three public librarians to such a worthwhile conference. The conference allows the opportunity for networking and the tools to become a more affective public librarian.

Valuable professional contacts are made and valuable information acquired whenever the members of the Montana State Shared Catalog gather to discuss issues related to the work we do with our primary electronic tool (the shared catalog). Participation and understanding is especially important considering the changes the catalog is undergoing and the decisions we are making to add staff with a resultant increase in cost for members.

Any money we can find for learning opportunities greatly benefits both our library and our community. We are better able to manage the administrative and "behind the scenes" aspects of our library due to learning new ways that other libraries have found to be more effective. Conferences also provide us with ways to help us network and stimulate new community connections to better provide services to everyone possible. Mitch attended training sessions relating to the operation of the library. Colleen attended training sessions to keep her up to date on developments relating to technology and libraries, and to work on her continuing education credits.

DPL Board of Trustees is composed of new Board members and it is extremely valuable for these people to have the opportunity to meet Directors and Board Members from other communities to see that we are not a singular, isolated organization without support or resources to help us tackle the work and issues we face as the public library in Dillon.

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This is the first time in the ten years I have worked at DPL that I have had multiple board members attend a Broad Valley Federation meeting and workshops, and one of the few times I've had any board member attend with me. The Library Finances and Strategic Planning sessions were extremely valuable for me to have the knowledge reinforced for myself and to have the Board hear it from someone besides myself. I have not been able to successfully motivate the DPL Board to do strategic planning and with the knowledge gained from these workshops, I believe we have the motivation we need to successfully engage in this important activity.

Valuable professional contacts are made and valuable information acquired whenever the members of the Montana State Shared Catalog gather to discuss issues related to the work we do with our primary electronic tool (the shared catalog). Participation and understanding is especially important considering the changes the catalog is undergoing

and the decisions we are making to add staff with a resultant increase in cost for members.

Attended classes needed for recertification.

These meetings help keep our library "up to speed" with valuable information, classes, and technical trainings on many aspects that affect our patrons, such as providing services to children, low income, and elderly patrons. We also learn from other libraries about successful ventures in their own library that could be spread to other libraries. The Shared catalog meetings are also valuable meetings with the rest of the consortium and state library staff about the direction our statewide software has taken and where it will go for the next several months.

To allow several staff to attend various workshops and training sessions, thus enhancing their current positions; in addition to providing better service to the Library patrons.

Birds of a Feather allows librarians to visit with those who manage a similar library in a casual setting. It is beneficial to attend the MSC Spring meeting to participate in approving the budget, electing the leaders, and supporting a collaborative organization. A travel stipend to UM Professor Erick Greene allowed attendees to learn about Osprey that occupy nests on local lands and to see close-up the work that scientists do. We received beneficial education and awareness about the dangers of mercury in the waters where Osprey live and dangers to Osprey because of orange bailing twine used by ranchers in our area. Attendees were able to observe and touch live Osprey chicks! It is beneficial to our librarian assistant to attend the Federation Meeting for training and networking with other librarians.

I attended on workshop on Google tools, Maker Spaces, and Tech training in our Libraries.

Each workshop added something different to my library administration education. I have implemented using Google Survey to add an online patron survey tool to be used on the library website for library development. The tech training and maker spaces workshop help me to develop my interesting programming for my library patrons.

Continuing education is very important for librarians. Libraries are quickly changing. We can offer our patrons better and more up to date services by meeting with other librarians and keeping up with the changes.

Our patrons benefit from our connection with other librarians because we learn from each other how to provide the best possible services.

The School District and the Library District share in the expenses of our library and it has benefited me to be able to attend the Montana Shared Catalog meetings by splitting costs of travel. At the meetings, I am better able to contribute to the decisions and discussions of our large consortium.

Attending MLA is not only something I look forward to socially, but something that benefits the library and its patrons by networking with other librarians. and learning the latest trends and services to provide for our patrons. I also have the benefit of sharing costs with our school district.

Billings is quite a distance from Drummond and this allows me the benefit of attending our state conference where I am able to network with other librarians and learn about new trends in library services for my patrons.

Our on-going English class for the town's Hispanic residents has had over 200 teacher-student encounters over the past nine months. The program has been going for over two years. In addition to the regular classes we have installed a language lab which students can use on their own time. The grant helped establish the lab.

I was able to take classes that improved my understanding/use of RDA cataloging,

storytelling/story time skills, internet privacy/digital crime prevention, and legal services available to Montanans. I've used what I've learned to recognize, alter, and appropriately use RDA records in copy cataloging for my library's collection. For story time, I've added about a dozen top quality books to our children's collection and have been able to incorporate some of the techniques I learned. I've begun working on a section of our website and have already finished handouts for patrons about the dangers of digital crime/ privacy violations on the internet. I learned some stuff I didn't know about legal services in Montana and have added to the section on our website. Our library also has a stockpile of cards about legal services to hand out to patrons as need be. Overall it was an excellent conference and well worth the time/monetary investment. I've learned a lot that I brought back to my library patrons to improve our library and our patrons' lives.

Travel expense to meetings.

Three staff members attended one completed certification. These training opportunities help keep staff engaged in their professional development and better able to deliver services to the public.

Continuing education is vitally important for library staff. It ensures they are updated on new technology and other issues related to their jobs, so they can improve service to the community. By attending this year's MLA conference, new ideas were obtained for programs and for potential fundraisers. The Library Board is currently discussing some of the fundraising possibilities brought back from MLA by library staff. They are considering these ideas to assist in bridging the revenue gap during another difficult budget year. So this brings the benefit of continuing education to the whole library and well beyond individual staff members.

I attended several workshops dealing with the Montana Shared Catalog and the combining of several categories in order to clean up and make the MSC more user friendly. Because the MSC is moving forward it was very beneficial to be able to learn how the process was going to be accomplished and what impact if any the changes would have on my library.

I was able to attend classes that will enable me to help my patrons work their way around the Internet. I took a class that gave me wonderful resources for our patrons in need of legal assistance; one class helped me to become a better storyteller for our preschool children and another gave great ideas on enhancing our Summer Reading programs.

I attend both of these meetings, as well as others, so I can earn certification credits for my certification. I also attend so I can bring new ideas back to the library. I also try to network while I am at meetings so I can find out how other libraries are handling problems such as working in a small library with limited space and budget. At the Broad Valleys meeting there was a 4 hour discussion in how libraries are financed. It was full of information that I was not aware of.

This will benefit our cataloging department.

As a new director the benefit was meeting other directors, attending meetings, and learning about the shared catalog.

Benefit will be to make the transition from MARC record to RDA.

Attendance at the conference provides access to invaluable continuing education opportunities for staff working in all departments, including technical services, circulation, information, programming, systems and administration.

It is also an opportunity to network with peers, share ideas and discuss new trends in

library services. This year three Lewis & Clark Library staff were also presenters at the conference, one session on storytelling, the other on protecting your privacy on the Internet.

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

We are a full cataloging library. OCLC original cataloging provides access to rare items which are then made available to users via Interlibrary Loan (ILL). Membership in OCLC also allows access to Interlibrary Loan Worldshare in order to both share and make available our collection, as well as access library collections across the country and world for our patrons. Our patrons have taken advantage of a virtually unlimited library collection and they have used Worldshare to generate their own ILL requests. Resource sharing through OCLC expands our library collection beyond our four walls.

The Montana Shared Catalog allows our local patrons access to materials from other libraries around the state by allowing patron ability to browse and reserve items (inter or intra library loan) from other MSC member libraries. This invaluable service is cost effective and provides opportunities to patrons who wish to borrow items from other Montana Libraries.

The Shared Catalog also helps us evaluate and keep our system running efficiently by providing monthly optional reports. These reports keep our inventory accurate, help us with collection development and provides statistical data for state and federal reporting. Providing greater access to patrons by expanding catalog options throughout the state. Free computer and internet services to our patrons 24/7. I find people nights and weekends using the free and reliable wifi in the parking lot.

The computer is needed to provide better services to the public and is very slow with inadequate storage.

Our local heritage center and genealogy group rely heavily on this database to do their research. They are often in the library working on family histories for people from all over the United States.

Belonging to OCLC provides DPL with access to a wide range of services which support

our participation in the Interlibrary Loan program giving our staff and users the ability to request and manage Interlibrary Loans. We gain access to the My Montana Library Group Catalog which has been extremely valuable to us because our primary website has been static and under construction for over a year. OCLC databases provide DPL with the broadest possible access to world wide data bases to use as a cataloging resource.

Belonging to the Montana Shared Catalog enables the Dillon Public Library to have at its disposal a state of the art integrated library system. Without participation in the Montana Shared Catalog (MSC) DPL could never provide a library catalog with nearly the degree of technological sophistication as provided by MSC. In addition, we receive training and assistance from top rate professionals. Our participation in MSC is what has allowed the 4 Rivers Group of the MSC to share openly our resources between the 9 participating libraries in Southwestern Montana.

The ability to be a part of this community of libraries from all around the world and share library materials is very helpful. Borrowing expensive books that our library cannot afford to purchase at the present time, in order to help patrons study for exams or prepare for travel is a satisfying experience. This system is also very useful in terms of book clubs. We have the ability to borrowing several copies of the same book from multiple libraries instead of spending extra money on expensive book club kits.

ILS access.

Continued PAC access, now that XP is no longer supported by MS.

How does this affect our patrons individually? We see elementary students placing holds for a series we may not carry. High school students borrow materials for research projects. Adults in the community borrow popular books and movies that may not be available in our library because they are already in use. We do not have the shelves to hold all the materials that our patrons have access too. Our budget is limited, but being a part of the Montana Shared Catalog stretches our budget further by making more materials available and by eliminating the need to purchase our own library server. MCSL is thankful for our federation funds and how it positively affects our patrons. To assist in collection maintenance and records organization.

ILL access to allow library customers to have access to broader borrowing options.

Being a member of the Montana Shared Catalog means patrons have access to materials throughout Montana.

Being part of the Montana Shared Catalog is one of most important services that the patrons of Three Forks Community Library are able to use. By being a part of the shared catalog rarely does a day go by that my library patrons are not able to find and access resources that are not available locally. It is my best resource sharing tool. Without the Montana Shared Catalog, my patrons would be very, very limited in the materials available to them.

Being able to use the copy cat cataloging resources from OCLC make preparing my materials for my patrons so much easier and quicker. This resource pays for itself in the amount of cataloging time that is saved so library workers are freed up to work more closely with patrons needs.

We are a small library with a very diverse population. If we don't have what a patron needs here on our shelves, we can borrow it from another library. OCLC group services greatly increases what we can offer to our patrons.

E books are becoming more, and more popular with our patrons. Our patrons have access to thousands of e book titles and audio books with Montana Library 2 Go. It increases the service we are able to provide for our patrons.

Access to the internet is a service that our patrons appreciate and take advantage of and when an outdated computer slows their access, it is time to replace and update our equipment. Internet use has increased each year and this benefits our patrons who use the library's computers. One elderly patron used the computers to search for the online manual for using his new digital fishing locator. Another patron visits the library frequently to update inventory for her home business. Of course, children use the computers to play games; but I have been pleasantly surprised to see the number of young people accessing the catalog and doing more actual research and reference than social networking and games. I especially enjoy visiting with travelers and visitors who use our services to keep in contact with their social network; checking email and posting blogs. They are always amazed that our little library offers such services as internet and wireless access and we are so glad to be able to provide the service! Our patrons benefit from our subscription to Heritage Quest in many ways. Our local LDS church held a number of programs at the library to do genealogy research and also appreciated the benefit of using the database from home or from their church office. Other patrons have used the service including individuals and classrooms of students. The cost increased and we were able to cover a little over half from our general budget. More people are able to access the internet. One woman who had struggled to get a job, used the laptop almost everyday. Last week she came in to let us know her hard work had paid off, she had gotten one of the many jobs she had been applying for. A new staff computer is so important because it handles all the work done by the director. It is used to catalog, keep track of circulation of books and the number of patrons which is every important. Also it is important to be able to have OCLC support our collection and offer us WorldShare which offers our library many options for obtaining books our library could not afford.

Providing patrons with online services for titles and research.

We spent this money to renew our MyMontanaLibrary2Go membership (\$ 724) and partially renew Heritage Quest (\$ 520). These statewide projects make it possible to provide top-notch, cutting-edge services to small, rural areas. Our library is so grateful to be able to participate in both these services. We recently had a patron move from Santa Barbara, California that was completely blown away that we could offer her access to a digital collection. Turns out the big, urban library system that she came from had a similar digital lending subscription--but she found she liked ours better! Heritage Quest continues to be the mainstay service we provide to genealogists. It is easy to set up for a patron to use, and they usually walk away very happy with/intrigued by the family history that they learn. Our librarians are not genealogists and are very grateful not to be called on to trouble shoot and help in this area--we love Heritage Quest!

Increased access to other library holdings. Because we are not part of the shared catalog without our membership in OCLC we would be unable to see other library collections.

Continuing to add our records to OCLC and improving our existing catalog records enables our library to make more of our collection accessible via inter-library loan. This improves patron service for all libraries and benefits all Federation members with more cooperative resource sharing.

Program 4 - Book Discussions in a Bag - Remove Program Four

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 BVF 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. Depending upon the cost for the annual retreat, these funds may also be applied to Program 1 if necessary.