Memo

To: Library Development Study Task Force

From: Jennie Stapp, State Librarian
Sarah McHugh, Director of Statewide Library Resources

Date: May 20, 2015

Re: **History of Library Development services**

The history of providing MSL services that promote quality library development and resource sharing among the Montana library community is a long one, dating back several decades. The efforts have generally been balanced between MSL positions that are dedicated to the areas of public library consulting; the management of shared software and technology platforms; and training for library staff and trustees.   While funding to promote resource sharing in the 1980's was typically distributed to individual libraries through avenues such as direct interlibrary loan reimbursement or LSTA sub-grants, since the 1990's there has been a gradual shift to increased centralized administration of funding as Montana libraries have moved to large collaborative approaches to resource sharing. This shift has likewise informed staff growth and change within the Library Development (LD) section of the Statewide Library Resources Division. Some of this transformation has occurred because of changes in federal funding legislation and administration.

The list below is not exhaustive. It attempts to include a brief historical perspective on the primary, wide-reaching efforts that have shaped the changing scope of LD.

Statewide Consulting Librarians: Originally created in 1997, these positions were initially called "Statewide Technology Librarians" and a particular focus was to bring libraries into the developing online environment. In those early days, this

often meant literally helping with wiring in libraries to create basic internal networks, setting up early versions of email, introducing libraries to OCLC LaserCat discs which provided information about library holdings around the western area of the U.S., and trouble-shooting individual, internal circulation systems that were not always accessible to remote users. Additionally, these positions provided the same kind of consulting they do today in the areas of library administration, accounting, law, board development, standards, statistics and federations.

Today, these positions provide technical and other information about the several shared technology platforms or services hosted and maintained by other LD staff (Montana Shared Catalog, MontanaLibrary2Go, Montana Memory Project, OCLC Cataloging and WorldShare Resource Sharing, Courier Alliance as examples). They also have specialty areas of focus which currently include E-rate, Community Partnerships and Digital Content.

Montana Library Network: From 1999-2007, "MLN" Director Bruce Newell reached out in several directions to bring statewide resource sharing to a new level. One of the first achievements of MLN was to create an online directory of Montana libraries that provided a searchable database of contact information, maintained by MSL but updated directly by library directors. The initial acquisition of a suite of statewide OCLC services, the creation of the Montana Shared Catalog and the launch of the Montana Memory Project were all achieved under the banner of "MLN".

Beginning in 2007, this position became the Statewide Projects Librarian position. The concept of a statewide network of libraries collaboratively sharing costs and expertise remains vital to new pursuits, but an overall sense of a library network is less apparent in the current approach to separate statewide projects. Today, this position provides technical, administrative and implementation support for MontanaLibrary2Go, OCLC Group Services, Courier Alliance, statewide databases, a statewide integrated search tool, a centralized authentication tool and many smaller projects and pilots such as Montana Makers and Share Your Story. In addition, this position serves as the LSTA coordinator for the agency, creating the annual LSTA report to the Institute of Museum and Library Services.

Montana Shared Catalog Director and staff: The creation of the MSC in 2002 eventually led to the need for a director, a position that was created in 2004. Three additional staff has been added over the last decade as the number of libraries has grown from the original 17 to 177. The membership covers the total cost of two of these additional positions and about 2/3 of the cost of the third. The positions reflect ongoing needs of the consortium: the annual work of

bringing on new libraries; training in all aspects of the staff software, statistics reporting tool and end user interface; and the ensuring of high quality catalog records—a crucial component of a quality integrated library system.

Montana Memory Project Director: The MMP is considered a growing program of the State Library and the multiple tasks involved in supporting and administering this program require a central position. The first MMP Director was hired in 2013, filling a former position that was responsible for grant coordination. Since that time, this project has expanded considerably, both through in person outreach to libraries, museums, archives and local city and county governing bodies, and in its online presence.

LSCA and LSTA Early Projects: Library Services and Construction Act (LSCA) federal funding was a vital part of library development projects during the mid to late 1990's. It provided funding in the form of sub-grants to individual libraries focusing on underserved communities in need of library service. Examples among Montana libraries included a "Have Laptop Will Travel" and a "Virtual Museum" project, as well as building construction and remodeling efforts by selected grant recipients. In 1996, the LSCA was replaced by the Library Services and Technology Act (LSTA), dropping construction from the federal funding available. States were allowed a transition period and 1998 was the final year MSL managed both LSCA and LSTA projects, carrying over LSCA funds for LSTA purposes. The emphasis of LSTA funding has been technology, with the creation of technology infrastructure at its core. A major initial MSL LSTA funded project was an "Internet Connectivity Project" impacting twenty-one libraries, with a second phase planed for fourteen eligible libraries in 1998. These types of projects provided funding directly to libraries to purchase either direct or dial-up Internet access in the late 1990's.

Under LSTA, all library types are served, a major change from LSCA funding. Services to the under-served and rural areas remain a priority under LSTA. For instance, a 1999 LSTA project at MSL provided funding to selected libraries that enabled them to offer library services to residents of a local veteran's home, a human services center, a mental health nursing care center and the Montana School for the Deaf and the Blind.

The Institute of Museum and Library Services (IMLS) also was created in 1996 as an independent agency of the federal government whose responsibilities included library services. This agency took over the oversight of the newly named LSTA funds. The establishment of an IMLS long range plan then began and continues to inform specific funding categories created by each state library administering its LSTA funding.

OCLC Group Services: Montana was one of the first states to negotiate a statewide suite of OCLC products providing cataloging and interlibrary loan services. This "group services" arrangement began in 2000 and was based on a single, flat fee price for a group of OCLC services to include, at the time: cataloging, ILL, reference inquiries to WorldCat via FirstSearch, CatExpress and LaserCat. New libraries could be added to the contract without additional cost. A small group of what were considered "online" libraries-- in that these libraries were creating cataloging records and engaging in ILL through the Western Library Network environment-- received a 10% discount from the 1999 prices they had paid as individual libraries using OCLC/WLN services. The 1999 prices those libraries had paid were based on transactions (original cataloging records created (credits), records downloaded and ILL transactions). The two large academic libraries (UM and MSU) were given an additional subsidy by MSL, using state resource sharing funding at the time, to bring them into the formula and make the formula workable for all. The remaining amount of the overall group services fee was collected from the libraries not "online" (LaserCat libraries and libraries not in WLN or OCLC at the time). MSL covered any funding gap.

Today, there is a new cost share formula that makes costs more equitable for all enrolled libraries, based on actual usage and patrons served. MSL covers the entire cost of the unlimited Interlibrary Loan subscription using state resource sharing funding and federal LSTA funding. The State Library also provides $20,000 annually in LSTA funding toward the total cost of unlimited cataloging services, which reduces the remaining costs for cataloging that are covered through individual library enrollment fees. All libraries are considered "full" cataloging libraries and can perform original cataloging of bibliographic records within WorldCat. WorldCat.org is now fully web-centered, with features such as "find it in a library near you" and other end-user interaction and customization options. The contract continues to be a statewide, wholly inclusive arrangement and libraries can be added without additional cost.

Statewide Databases: The 2009 Montana Legislature approved specific funding for the statewide databases purchased by the State Library and made available to all libraries in the Montana Library Directory. Prior to that time, the cost of shared database subscriptions were covered by a mix of state general fund and coal severance tax monies and funding amounts varied annually. LSTA funds assisted separately with a Heritage Quest subscription for public libraries for a few years, with subscribing libraries contributing amounts based on service area population. The Heritage Quest subscription is now wholly funded by the subscribing libraries and the contract is managed through the Missoula Public Library. Thomson Gale Publishing provided the statewide suite of databases for many years until 2011 when the Network Advisory Council selected a new suite from EBSCO, Inc. and also entered into a contract with Tutor.com to provide Homework MT. These changes responded to an increasing desire to provide a broader set of online subscription services as well as the delivery of traditional academic and public library patron oriented databases.

Montana Memory Project: The MMP developed from a 2004 statewide discussion about current digital content being created at the time by libraries. It began as a 2005 pilot that focused on working with libraries to identify unique historical and cultural material, digitizing those resources, and making them available in a searchable, online environment. OCLC offered a small group of libraries, including the Historical Society Research Center, the opportunity to utilize their new "CONTENTdm" software to launch the project. This group contributed the first collections to what would become the MMP. Originally MSL hosted the content and software on its own server.   Libraries were also given an opportunity to test OCLC's Digital Archive product, a new product at the time that provided storage and preservation of master image files. In 2008, the Historical Society joined MSL as a major financial and support partner in providing both CONTENTdm and Digital Archive hosting and software to institutions contributing to the MMP.

Today, this project has a full time director. OCLC provides hosted environments for both CONTENTdm and the Digital Archive. There is LSTA funding available annually to assist contributors with the cost of digitizing their materials. MMP holdings are represented in WorldCat, the Mountain West Digital Library and the Digital Public Library of America.