

## Montana Talking Book Library Report April and May, 2015

Prepared for the June 23, 2015 Commission meeting  
By Christie Briggs, Supervisor

This report represents accomplishments of Montana Talking Book Library Staff: Jackie Crepeau, Readers' Advisor; Bobbi DeMontigny, Readers' Advisor/Machine Lending Agent; Erin Harris, Recording & Volunteer Director; Martin Landry, Readers' Advisor; and Carolyn Meier, Circulation Coordinator

### Goal One—Content

1. MSL acquires and manages relevant quality content that meets the needs of Montana library users.

1.4. Manage the Montana Talking Book Library (MTBL) and serve eligible patrons (with talking books, Montana recorded books, Braille books, etc.) according to federal and state mandates.

#### MTBL Specific FY15 Objectives:

- Based on approval of a pending EPP funding request by November, 2014, secure legislative approval by May, 2015, for the completion of the Audio Digital Conversion Project which includes 795 analog titles remaining to be converted. The benefit to patrons is to offer access to, and meet the demand for greater content of, local Montana titles available in a digital format. To date, fifteen other Talking Book Libraries have downloaded our first converted digital book from BARD, for distribution to their patrons, saving MTBL (Lead staff: Christie Briggs)

**(Originally reported October and December 2014)** The EPP proposal was not approved for inclusion in the Governor's Budget. Alternatives were being evaluated.

**(Originally reported April 2015)** Currently evaluating the viability of the Audio Digital Conversion Project to be incorporated as part of MTBL's training of Experience Works Training Program (EWTP) trainees. Considerations include: Appropriate project expectations of EWTP trainees; evaluation of skills level requirements for a trainee to follow detailed and intricate conversion steps; identification of those portions of the project which only the Recording Dir. (or other staff) can accomplish; time required of the Recording Dir. to train and oversee a trainee; additional time required to complete the project (probable extension of the project past the original projected 3 years). Other alternative training programs are still being considered. Decision will be confirmed by June, 2015.

**(Update: June 2015)** This project is on hold due to other priorities in the Recording and Volunteer Programs that take precedence over this project due to the recent retirement of the Circulation Manager starting in June, 2015. Examples include: continued training of existing and new recording teams, post-production of newly completed titles, as well as necessary in-depth monitoring of circulation volunteers downstairs.

- Research and develop plans for a second in-house recording studio by March, 2015, to benefit an increase in the patron demand for a higher quantity of accessible on-demand and locally produced audio digital book and magazine titles. (Lead staff: Christie Briggs, Erin Harris)

**(Originally reported April 2015)** This is a multi-step research and evaluation process. Currently researching ventilation (heating/cooling), electrical and space impacts with MT General Services to support a portable sound booth. Three vendor specifications are currently being evaluated by MTBL staff against NLS and ADA standards, with NLS consultation input. One vendor submitted an estimated quote for minimal specifications, providing a baseline starting point. Further NLS/ADA specifications will require additional add-ons to the basic quote. Ballpark range for just the booth from one vendor is estimated at \$12,000, not including a current rough estimation of over \$42,000 for installation, MT General Services support, IT requirements (addition of two IT ports, and 2 computers for a program volunteer monitor and reviewer), and necessary office furniture and supplies (chairs, work tables, etc.). Estimated timeline for research completion is still on track for June, 2015.

**(Update: June 2015)** This objective will be added to the FY16 MTBL Work Plan objectives. Two additional vendors have been suggested for consideration by the National Library Service (NLS). Continued research will include an on-site visit from the NLS audio recording specialist in FY16 (which was not possible for NLS in FY15).

- Develop a more systematic approach to selecting titles for permanent ILL quotas from the NLS-MultiState Center West (NLS-MSCW) contractor by May 2015, identifying and replacing resources used in the Montana Duplication-on-Demand system, in order to increase the efficiency and cost-effectiveness of MTBL resources, and the efficiency with which patrons receive series titles as well as maintaining access to titles in higher demand. (Lead staff: Jackie Crepeau)

**(Originally reported April 2015)** NLS increased the quota amount for each library of digitized cassette titles that can be permanently Interlibrary loaned to each library. MTBL has implemented a monthly Reader Advisor communication system to identify higher priority titles in order to always utilize the maximum amount allowed for MTBL's permanent ILL quarterly request quota.

**(Update: June 2015)** MTBL established "permanent interlibrary loan quota guidelines" through utilization of created listings (including authors, series and essential titles), leading to a more efficient process and maximization of the NLS quarterly permanent interlibrary loan quota limits.

- Complete the BARD (Braille and Audio Reading Download) Bibliographic Synchronization project for MTBL's digital storage and digital duplication system with NLS by May, 2015 in order to make higher quantities of in-demand titles available to patrons faster. This will increase the annual amount of BARD Duplication on Demand physical copies (predicated on the ability to purchase adequate digital cartridge resources), in order to meet patron demands for increased digital copies of book and magazine titles. (Lead staff: Christie Briggs)

**(Originally reported April 2015)** NLS ended their rSync pilot project with MTBL, and other talking book libraries in FY13 due to Library of Congress server changes, which took a year to accomplish. NLS is now working out the details of installing a full BARD Synchronization program (BARD-rSync) with MTBL and other TBL's. This will involve MSL's IT administrator to coordinate details with NLS IT staff to set up. The initial impact to MTBL's SAN space is 10GB. Duplication-on-Demand doubled from FY13 to FY14. Although the pilot project ended prematurely by NLS, it proved valuable in decreasing staff time from performing time-consuming BARD downloads and then duplicating to direct duplicating from the BARD rSync storage. Staff time processing direct patron digital cartridge ILL's through the NLS MultiState Center West (NLS-MSCW) in Utah also significantly decreased (from 40% in FY12 to 20% in FY13). After NLS ended the pilot program prematurely in FY13, a request for additional cartridges from the MTBL portion of the MSL Trust did not meet the Trust guidelines. MSL management approved a one-time MTBL End-of-Year budget request to purchase 900 cartridges, which proved to be crucial in getting MTBL through a high patron demand period for BARD titles to be duplicated-on-demand for non-BARD patrons (80% of all patrons). In directing staff to stretch the duplication of these cartridges over a two year period, while attempting to meet the primary goal of all patron needs for duplication-on-demand in FY14 and FY15, staff identified low and high circulation collection trends; queries of patron demands for certain authors and titles and designated as many MTBL cartridges as possible for re-use. Also, staff instituted a greater amount of direct patron ILL's (from 20% in FY13 to 45% in FY14 and 65% in FY15), as well as met the NLS increase of 2015 in the amount of allowed quarterly digital cartridge quotas for libraries to replace a small quantity of digitized cassette titles from the NLS-MSCW's permanent library ILL system, both in lieu of MTBL in-house duplication-on-demand from the NLS-MSCW contractor in Utah. During FY14 and FY15, the annual required NLS Digital Cartridge Recall Program (of NLS cartridges only) revealed a greater than anticipated amount of return from talking libraries. As a result, all talking book libraries and NLS began a laborious negotiation process which concluded in NLS agreeing to include distribution of a certain amount of new NLS purchased cartridge quantities to talking book libraries in dire need. \*MTBL submitted a request to NLS on 3/18/2015 (the NLS announcement was posted after 5pm on 3/17/2015) for 3,000 cartridges (with approval pending). Approval is expected by July, 2015. If not approved, MTBL will continue on the current course of actions, and review additional areas (e.g., duplication of book series) in high patron demand.

**(Update: June 2015)** Delays have occurred in going forward with completing the rSync project due to scheduling and resource issues. This will be included in as an FY16 objective, in coordination with MSL's IT and NLS staff. NLS started shipping new blank cartridges in May,

with corresponding container shipments expected to begin in mid-July. This will work in tandem with the rSync project and increase resources for duplication-on-demand for patrons.

- Through the MTBL-MLA (Machine Lending Agency) recycle cassette equipment by June 30, 2015, (based on the availability of adequate digital players and books) to ensure patrons will benefit from free access to easier-to-operate accessible digital players for listening to digital cartridges, as well as downloadable materials. (Lead staff: Bobbi deMontigny)

**(Update: June 2015)** The current NLS cassette machine recycling process has been completed. A newly developed NLS software program for inventory control of machines is planned by NLS for implementation in FY16. It is hoped this will offer improvements to the current NLS machine recycling process.

- Complete the NLS cassette book recycle program by June 30, 2015, in compliance with NLS guidelines. This will benefit MTBL by having more in-house space to accommodate receiving a larger number of digital copies to the MTBL in-house collection, which in turn will meet increased patron demands for additional copies of available titles. (Lead staff: Carolyn Meier)

**(Originally reported April 2015)** The Circulation coordinator and volunteers have doubled the recycling of cassette book copies from 5,000/quarter in FY14 to 10,000/ quarter in FY15. The deadline for completion has been moved from June, 2015 to January, 2016. This will not have a significant impact on the original estimate due to monitoring and projections of several significant changing in activities and trends: unexpected changed in NLS recycling contracts; completion of NLS cassette to digital book conversion program; installation of the NLS BARD-rSync program; the continued steady decrease in patron demands for cassette titles; a concerted effort of staff to encourage "digital only" services for existing and new patrons, MTBL BARD patron utilization (only 20% of all MTBL BARD patrons signed-up are consistently using BARD), new BARD patrons (a projected increase of 5% is anticipated from 15% in FY14 to 20% by June, 2015); requests for duplication-on-demand.

**(Update: June 2015)** The previously submitted listing of 8,000 cassette book copies for recycling was approved by NLS for shipping. Specialized NLS replacement shipping cards were received recently after the first card shipment was confirmed as never being received. Recycling of cassette books will continue, according to the NLS required guidelines and schedules, until all RC's are recycled, which will take 1-3 years.

- Develop a plan to phase-in a fully automated circulation process of digital book inspection, check-in and inventory by June, 2015. This would increase efficiency and accuracy as the cassette book collection continues to diminish and the considerable increase in the digital book collection. This would require coordination with the Director of the Volunteer Program to include cross-training of volunteers to the Montana Duplication on Demand process. (Lead staff: Carolyn Meier, Erin Harris)

**(Originally reported April 2015)** The deadline has been moved to evaluating this objective in January, 2016 when in-house circulation of cassette books and machines will be

discontinued. The impact to MTBL of an automated circulation process of digital books and machines is contingent on evaluating the cost and budget for implementing a new barcode scanner system which would increase efficiency in circulation.

**(Update: June 2015)** MTBL's Keystone database vendor confirmed the possibility of implementing this system using current scanners and creating labels in-house. Implementation of this new project has been placed on hold due to Carolyn Meier's announcement to retire as Circulation Manager on 5/29/15, after 31+ years at MSL.

- Complete the 2014/2015 digital book recall program by June 30, 2015, in compliance with NLS guidelines, to insure NLS has additional recycled resources to produce more books for patrons on a national and state level. (Lead staff: Carolyn Meier)

**(Update: June 2015)** This was completed for the NLS federal fiscal year (ending 9-30-14.), and two-thirds completed for the current NLS federal fiscal year (ending 9-30-15), with anticipation of 100% completion prior to that date.

- To encourage Early Literacy of our younger Braille readers, MTBL will adopt the new rules of the Unified English Braille (UEB) system (which were adopted by the Braille Authority of North America in 2012) by June 30, 2015, to improve the quality and quantity of in-house children's twin-vision Braille collection and meet the Early Literacy education needs of our younger Braille readers. (Lead staff: Christie Briggs, Carolyn Meier)

**(Update: June 2015)** NLS reported that the impact of the UEB system will be minimal on NLS Network Library patrons and staff. Current Braille materials will not need to be modified to reflect these changes. NLS proposes that additional benefits to braille patrons will be a seamless inclusion of minor braille changes.

## **Goal Two—Access**

2. MSL provides libraries, agencies, and its partners and eligible patrons with convenient, high quality, and cost-effective access to free library content and services.

2.1. Improve the user interface of MSL's Web sites and improve and expand online services to meet changing user needs.

2.3. Improve Montanans' access to library materials (including discovery, request, and delivery), providing more materials to choose from, and making access increasingly efficient.

2.9. Provide appropriate specialized access for the programs and resources available for MTBL patrons.

### MTBL Specific FY15 Objectives:

- Purchase and install new HABC post-production and recording software by July 15, 2014, to complete post-production of newly completed “born-digital” titles, starting with MDB (Montana Digital Book) 2000, refining the markup and quality assurance processes by December, 2014. (Lead staff: Christie Briggs, Erin Harris)

**(Originally reported December 2014)** Accomplished installation in July, 2014.

**(Originally reported April 2015)** Completion of the post-production process (markup; wav equalization of sound quality; quality assurance (QA) committee review; duplication, NLS encryption and verification of cartridges) is currently in-process. The volunteer QA review committee has been re-activated. Original time projections were overly ambitious due to delays in receiving two wav software items that test sound quality, the Hindy recording training process of volunteer teams, and other time demands on the new Recording/Volunteer Program Director. A new target date for completion is June, 2015.

**(Update: June 2015)** The completion of the HABC post-production of newly completed “born-digital titles” is in process. To date, forty-five digital audio books have been started; fifteen are currently being recorded; and thirty are in various stages of post-production. The Recording Program Director continues to learn the recording, noise reduction, and the equalization software programs. Two volunteers are currently being trained to help with the HABC post-production quality assurance processes.

- Accomplish the conversion of the new recording studio software from the existing LCM (Low Complexity Mastering) system recording software to HABC. LCM is no longer supported or updated by its manufacturer and runs only on the outdated Windows XP platform. This will benefit patrons by having a higher quality, more efficient platform for listening to newly recorded Montana titles. New digital titles will be uploaded to BARD, through an NLS process, and made available to patrons and other Talking Book Libraries nationwide, increasing MTBL’s efficiency in decreasing staff time processing out of state patron ILL’s. (Lead staff: Erin Harris)

**(Originally reported December 2014)** Accomplished installation of the HABC , or “Hindy”, recording software, and replacement of old hardware in July, 2014.

**(Originally reported April 2015)** All but two wav software items were previously installed and tested in July, 2014. The installation of these two wav software items were delayed after discovering, and eventually correcting, vendor requirements for designation of the appropriate user ID during the procurement process. These were finally installed in February, 2015 and are being tested in the post-production process.

**(Update: June 2015)** Software conversion and upgrade has been completed and basic training of existing and new volunteer recording teams is completed. Two MTBL digital audio books have been uploaded to BARD. More will be uploaded as they complete the multi-step post-production quality assurance and BARD requirements. The Recording Program Director has learned one Wave sound equalization software and is currently learning the second.

- Improve the user interface of MSL’s MTBL Web site through development of accessible DNN website formatting and ensure all MSL webpages have conveniently located ADA

accessible toolbars for end users by December, 2014. (Lead staff: Christie Briggs, Erin Harris)

**(Originally reported October 2014)** Accomplished in October 2014.

**(Originally reported April 2015)** Changes have been implemented since this accomplishment and further developments are being planned by the MSL Web Oversight Committee.

**(Update: June 2015)** The content on the MTBL's webpages are updated as needed. (eh) The Web Oversight Committee has yet to review suggested changes from Edge Marketing consultants in the design of the introductory web pages for each program. MTBL will monitor these for ADA accessibility compliance in FY16.

- Increase user access to MTBL and all MSL resources by incorporating the use of existing and additional social media tools by June, 2015. (Lead staff: Erin Harris)

**(Originally reported December 2014)** Accomplished Jul-Dec 2014 timeline of projected FaceBook posts in December 2014.

**(Originally reported April 2015)** Currently working on timeline for projected Jan-Jun 2015 posts.

**(Update: June 2015)** Projected timeline for Jan-Jun 2015 posts was completed and on schedule. MTBL maintains an active Facebook page and posts information approximately twice a week. MTBL's "friends" are comprised of public librarians, Talking Book Librarians, Talking Book Library patrons, and the general public.

- Provide patrons with additional NLS genre bibliography catalogs in digital audio, Braille, and Large print, by June, 2015 to increase awareness and benefit patron access to desired titles, authors and genres. (Lead staff: Carolyn Meier, Jackie Crepeau, Martin Landry, Bobbi deMontigny) ~~new-RA~~

**(Originally reported April 2015)** Announcement of the NLS 2014 Gentle Romances bibliography catalog was posted in the winter issue of the Bits of Gold newsletter by March 20, 2015. Distribution of patron requests for this catalog will be processed as received.

**(Update: June 2015)** Completed by May, 2015. The NLS genre bibliography catalogs in digital audio completed thus far include: adventure (sea), various adult, young adult and juvenile award winners, suspense, paranormal romance, bestselling biographies, psychology, Cookbooks in specialized categories, and sports. Readers' Advisors will continue to create bibliographies of available digital audio titles to meet patron demands. The distribution of these will be "on-demand" only, not requiring bulk copy storage.

- Establish a fully KLAS automated notification system for notifying patrons of overdue books by June, 2015, with a specific focus on waiting lists. Collaboration with KLAS is essential in working out the current database capabilities, determine best practices of other KLAS libraries, and implementing improvements to the KLAS overdue reporting function. Success

will be determined by a decrease in the number of overdue items and the amount of staff time required to notify patrons of overdue items. (Lead staff: Martin Landry)

**(Originally reported April 2015)** KLAS implemented some updates to the overdue notifications in 2014. MTBL will discuss further clarifications and patron impacts at the April KLAS User Conference.

**(Update: June 2015)** Full automation of the KLAS overdue notification system will not be possible within the current constraints of the KLAS system. MTBL Readers' Advisors have tested and evaluated two existing notification methods within the KLAS system. One is based on the new Patron Notice feature and the other uses the Patron Overdue report. Both processes require a lot of staff time and follow-up. An FY16 objective will include researching how other KLAS libraries are addressing this issue.

- Upgrade KLAS (Keystone Library Automated System) database to accommodate bundling of multiple book and magazine titles by June, 2015 to benefit patron access to multiple titles on a single cartridge. (Lead staff: Martin Landry)

**(Update: June 2015)** As of May, 2015, half of this objective has been met. The "Bundle Barcode" (attaching multiple items to a single barcode) feature is now available within KLAS for book titles. This will not be available for magazine titles in the foreseeable future.

- Improve MTBL's WebOpac services to meet changing user needs for better search capabilities by June, 2015. (Lead staff: Martin Landry)

**(Originally reported April 2015)** Progress on this was delayed due to several unavoidable issues including the 2014 MSL IT identification of MTBL's KLAS server being out of warranty necessitating a move to a virtual server (as recommended by MSL IT), and a staff vacancy from May-October 2014, necessitating existing staff covering duties of the vacant position. The KLAS server move was accomplished in March, 2015. Discussion of implementing new KLAS WebOpac improvements will be re-initiated at the April KLAS User Conference.

**(Update: June 2015)** This will be an FY16 objective due to a revision of the MTBL timeline with Keystone Systems (KLAS). KLAS programming resources have been concentrated on creating a database interface mandated by the NLS migration of the equipment and patron databases to a new Patron Inventory and Machine Management System (PIMMS). Our revised timeline is to set-up the new version of the patron catalog during the next few months with the goal of having a live version by end of September, 2015. In order to allow patrons time to become familiar with the new version, the plan is to have the new version run parallel to the existing version up to Dec 31, 2015, and full transition to the new version by January 1, 2016.

- By June, 2015, refine the Montana Digital Duplication on Demand and the NLS Interlibrary Loan processes to improve efficiency in the utilization of digital cartridge resources to accommodate 85% of MTBL patrons who are non-BARD users. It is anticipated that the number of non-BARD users will decrease over time, but much slower than anticipated due to several factors, including individual patron capabilities and skills, internet access, patron



resources, and patron choice in whether to download or not. We are also working with NLS on Duplication on Demand resource solutions in this area. This will benefit patron demands for additional access to retrospective titles. (Lead staff: Martin Landry, Carolyn Meier, Jackie Crepeau)

**(Originally reported April 2015)** This MTBL objective has appropriately and necessarily been combined with the MSL Goal One- Content, MTBL objective (4<sup>th</sup> bulleted item) on the "BARD Bibliographic Synchronization Project".

**(Update: June 2015)** An FY16 objective to further refine this process and research with other KLAS libraries. Permanent ILL Quota books have been ordered to replace popular, high use duplication-on-demand titles. In collaboration with Circulation Manager and duplication on demand staff and volunteers, various areas have been identified for potential improvement of this process and maximum use of in-house resources. Exploring the possibility of establishing DOD and ILL quota specific request types to better track and expedite patron specific requests. Match DOD titles with Permanent ILL titles and evaluate whether to recycle the DOD titles, leave as an additional copy for high patron demand to make better use of MTBL resources. An additional benefit to patrons is quick response to requests for titles not held locally.

- Increase MTBL Outreach to Montanans on a quarterly basis by coordinating efforts with the Communications/Marketing Coordinator by October, 2014. (Lead staff: Christie Briggs)

**(Originally reported April 2015)** In October, November and December, 2014, further refinement was accomplished for MTBL outreach advertising from January-June, 2015. This included a news article on machine volunteers to Montana newspapers was distributed in January 2015; this article with a small MTBL advertisement in the Senior News Mar-Apr 2015 issue, and plans for continuation of MTBL's TV ad in FY16.

**(Update: June 2015)** Charter will run the MTBL TV Ad in May-June, 2015, on multiple channels, in multiple Montana cities, on a rotating basis. Benefit to potential patrons, and or their families, is increased awareness of MTBL services and access to the MTBL program.

- Educate patrons on additional services available to them by March, 2015, such as commercial digital titles available from NLS (and how to access them), as well as the newly available iBill Currency Reader (and how to operate them) through consumer conferences, Bits of Gold newsletter, website and social media avenues. (Lead staff: Christie Briggs, Jackie Crepeau, Erin Harris)

**(Originally reported April 2015)** Accomplished through all indicated avenues in this objective by March 2015. These efforts have resulted in a modest increase in new patrons. These efforts will continue and be re-evaluated in FY16.

**(Update: June 2015)** In addition to individual service contacts, patrons have received two newsletters (a third is scheduled for July, 2015) providing information on services and digital titles. Use of social media and MTBL website postings have assisted in educating patrons on additional services available to them. Presentations and demonstrations were given at the

major 2014 Montana consumer (user) group conferences (MT Assoc. f/t Blind, Nat'l Federation o/t Blind, American Council f/t Blind), attended by a representative portion of our patrons, and will be repeated at the 2015 Montana consumer (user) group conferences.

### **Goal Three—Training**

3. MSL provides appropriate trainings and training resources so that the best use can be made of the resources offered.

3.1. Enhance Montana State Library's statewide training opportunities including all formats with client-learning as the Library's goal.

3.4. Provide regular training opportunities for MSL programs and services

3.5. Train and assist users to contribute content to MSL's collections.

3.6. Provide a central repository of training materials in various formats that support and make successful ongoing statewide projects and MSL resources and services.

#### MTBL Specific FY15 Objectives:

- Develop a training manual to transition volunteers from the obsolete LCM recording software to successfully operating the new HABC recording software by December, 2014. Begin training volunteer teams on a one-on-one basis, completing all team trainings by April, 2015. (Lead staff: Erin Harris)

**(Originally reported April 2015)** A volunteer recording training manual was completed in December, 2014. Volunteer recording teams (8 of 10) successfully completed new "Hindy" software training by March 2015. Two new Montana digital books, MTBL's Bits of Gold winter newsletter issue and one new potential narrator audition were completed by March 2015. At the request of the Secretary of State, recording began in March 2015 on the current 2013 issue of the "Montana Constitution".

**(Update: June 2015)** The HABC Training Manual was completed in December, 2014, is being used as a primary source for training volunteers, being updated as needed. Training was completed of all existing volunteer teams in March, with two new teams being trained in April and May, 2015.

- Maximize Montana State Library's interdepartmental awareness and maximize MTBL staff training through understanding and promotion of all MSL programs for increased benefit to MTBL users, with emphasis on training patrons on utilizing MontanaLibrary2Go, and various e-book readers. The fall SLR retreat in October, 2014, will assist in this effort.

**(Originally reported April 2015)** At the October 2014 fall SLR staff retreat, a recommendation was made to include MTBL staff in the larger monthly SLR meetings. Due to time constraints of all programs, a twice-monthly, half-hour meeting, was established in

January 2015, to include MTBL staff in SLR/LDD staff update meetings. The immediate impact has been an increase in SLR basic interdepartmental awareness, but time has not allowed for training on various programs and how to cross-promote them. Further development of agenda items, program input and evaluation of these meetings is necessary.

**(Update: June 2015)** The use of GoToMeeting as an effective tool of regular SLR staff briefings has been successful in keeping SLR staff generally updated on monthly activities. Collaboration with Cara Orban and OverDrive has resulted in being able to offer the NLS/MTBL online BARD service on Over-Drive's MTLibrary2Go website, replacing the BookShare service contract that ended with OverDrive.

- Provide staff training opportunities to attend the KLAS User Training Conference on April 21-23<sup>rd</sup> in Oklahoma City, OK., as well as the 2015 Western Region Talking Book Library Conference on May 12-14<sup>th</sup> in Sacramento, CA.

**(Update: June 2015)** Martin Landry attended the KLAS User Training Conference on April 21-23, 2015. Valuable information was received on several KLAS related objectives MTBL currently has in place (patron overdue notices, upgrading WebOPAC, etc). It was decided not to attend the 2015 Western Region Talking Book Library Conference in May. Information from the conference was accumulated as best as possible from Western Conference Librarian colleagues, listserv discussions and teleconference on certain topics, along with follow-up on resolutions submitted to the NLS for the 2016 NLS bi-annual conference. Focus was given to staff training videos (digital machine video production by NLS), and other in-house resources available.

- Provide digital talking book machine (DTBM) repair web-training to the new MTBL Readers' Advisor and Machine Lending Agent in the 2015 NLS training cycle. (Lead staff: Bobbi deMontigny)

**(Originally reported April 2015)** NLS provided the first digital machine repair web training video tool, made available in February 2015 to talking book library machine lending staff. This will lead to further planning and development of a training program for machine repair volunteers utilizing NLS web videos, as well as MTBL web training tools, in the near future. The immediate impact is better training for the new MTBL Readers' Advisor/Machine Lending Agent.

**(Update: June 2015)** DeMontigny has learned the fundamentals and gained experience as Machine Lending Agent and will continue to learn more as training opportunities become available and cost effective.

- By June, 2015, increase public librarians' awareness of available MTBL service options through several avenues, including upgrades to the MSL/SLR Learning Portal, at the Fall Workshop Poster Session in September, 2014, as well as coordinating with MSL/LD Consultants.. Public Libraries are often the first point of contact for finding specialized

library services beyond what the Public Library may already provide. (Lead staff: Christie Briggs, Martin Landry, Erin Harris)

**(Originally reported April 2015)** MTBL upgrades to the MSL/SLR/MTBL Learning Portal about MTBL services were added by December 2014, after inquiries were received from public library staff attending the September 2014 Fall Workshop MTBL poster session. Starting in October 2014, additional inquiries have been received from additional public library staff, who viewed the MTBL Learning Portal, requesting additional information on specific MTBL services, costs, patron eligibility, and application processes. The impact has been better communication and awareness.

**(Update: June 2015)** MTBL continues to contribute to the content of the MLS Learning Portal as a tool for educating public library staff on available MTBL services. Plans for developing BARD instruction videos have been placed on hold due to other more immediate priorities (staff coverage of an open position). However, this will be addressed again in FY16 as indicated.

- Train MTBL staff on BARD improvements, utilization of BARD Mobile APPS on iPads and Android devices by June, 2015, in order to assist patrons with troubleshooting operation of the same.

**(Update: June 2015)** MTBL staff have accomplished this objective through various resources including attending the May, 2015, NLS teleconference on the new Android APP and its planned implementation; reviewing all BARD improvements from NLS communicated to staff through emails; referrals to the NLS BARD support contractors, and monthly NLS Telephone Open Forum conversations with NLS BARD staff.

- Provide MTBL program information and BARD training to public libraries in coordination with Library Development (LD) Consultants by June, 2015. (Lead staff: Christie Briggs)

**(Update: June 2015)** Initial accomplishment has been done through the MSL Learning Portal. BARD demonstrations are planned for the October, 2015, Fall Workshop.

- Provide improved troubleshooting of BARD issues to patrons by June, 2015, through staff training and education of BARD improvements and issues. (Lead staff: Martin Landry)

**(Originally reported April 2015)** Staff cross-training by Readers' Advisors on troubleshooting BARD issues with patrons, focusing on BARD improvements and focusing on specific patron issues were accomplished in March, 2015. The reported impact on BARD patrons has been overcoming specific issues that repeatedly confused patrons through consistent step-by-step review of the issues by staff, and a decrease in BARD patron requests for staff troubleshooting in specific areas. Readers' Advisors are developing a FAQ to increase consistent training to existing and new BARD patrons.

**(Update: June 2015)** MTBL staff has accomplished this objective through various resources mentioned previously.

- Train MTBL staff by May, 2015, on the improved KLAS WebOpac search capabilities to benefit patron one-on-one training to maximize patron knowledge, skills and independence in searching MTBL's catalog contents. (Lead staff: Martin Landry)

**(Update: June 2015)** The implementation of the new version of WebOPAC which has been delayed due to KLAS hardware upgrades and scheduling conflicts. This will be an FY16 objective.

- Provide training to BARD patrons on the operation and use of the BARD Mobile iOS APP improvements by January, 2015, and the BARD Mobile Android APP by June, 2015, which will offer additional specialized mobile resources to current MTBL high-tech BARD users. Also provide opportunities for Montana patrons to be beta-testers for both NLS BARD Mobile APPS. (Lead staff: Christie Briggs, Readers' Advisors)

**(Originally reported April 2015)** MTBL Readers' Advisors and staff accomplished training to BARD patrons on the January 2015 NLS improvements they made to the BARD Mobile iOS APP, which was resulted unexpectedly from Apple's iPhone upgrades. There has been a gradual increase in BARD patrons using the iPad and iPhone BARD APP, as they become able to afford these devices and become comfortable in operating the voice-over functions in these devices. Training to these patrons by MTBL staff has become an important part of BARD patron orientation and ease of use of the BARD mobile iOS APP on these devices.

**(Originally reported April 2015)** The BARD Mobile Android APP is nearing the Beta-testing phase, which will include Montana patrons. MTBL is submitting an Android device request list for use with the Android BARD APP)

**(Update: June 2015)** All Readers' Advisors provided training to BARD patrons on how to operate the BARD Mobile iOS. It is anticipated MTBL will receive training on the BARD Mobile Android APP in FY16. NLS requested, and MTBL submitted, a list of Android devices we would like to use in learning the BARD Mobile Android APP.

#### **Goal Four—Consultation and Leadership**

4. MSL provides consultation and leadership to enable users to set and reach their goals.

4.4. Provide advice to partners and patrons concerning opportunities for cost-saving and operational-efficiencies.

4.5. Provide leadership and support to identify and address key information gaps for MSL partners and patrons. Gaps may include but are not limited to early literacy, access to sustainable Internet and technology services, access to legal and medical information resources, job related services and services to seniors.

4.7. Provide consultation and leadership to all local, state, federal agencies, and private entities who help MSL support Montana citizens who are blind, have low vision or are physically or reading handicapped.

MTBL Specific FY15 Objectives:

- Establish a quarterly schedule for increased awareness and utilization of the MTBL Patron Center by January, 2015, to increase client-learning of new technologies and build increased patron independence. Consult with similar agencies, organizations and private vendors, and training entities that assist and support patrons, in addition to the various patron consumer group events to accommodate patrons desiring more in-depth hands-on demonstration. This will serve patrons and their professional assistants by having a “go-to” place at MTBL for various technology demonstrations. (Lead staff: Christie Briggs)

**(Originally reported April 2015)** Development and schedules were accomplished by December, 2014, confirming schedules of prospective partners in using the MTBL Patron Center for trainings. As of January 2015, further development and consultation with additional partners is required due to various changes in partner structures, staff and schedule changes. New deadline: July 2015.

**(Update: June 2015)** Due to two 2014 MTBL vacancies in crucial staff positions, the outreach to additional or new partners was not accomplished. Use of the Patron Center by walk-in patrons is high, therefore, the use by partners will be re-evaluated.

- Update MTBL referral services for accessible technology information, cost-savings, and training resources to meet patron inquiries by June, 2015. (Lead staff: Christie Briggs)

**(Update: June 2015)** MTBL patron resource referral information was centralized from various individual sources and updated for MTBL staff use in conducting resource referrals to patrons.

- Provide leadership and consultation to Montana patron User Groups in September and October of 2015, and in April, 2015, in order to spread awareness and educate patrons on MTBL existing and new services. (Lead staff: Christie Briggs)

**(Update: June 2015)** This was completed through presentations made to User Groups (MT Assoc. f/t Blind, Nat'l Federation o/t Blind, American Council f/t Blind, and Veteran Low Vision and Blind services) in 2014 and will be done again in the fall of 2015.

- Provide leadership and support to patrons through their public libraries to identify and address key information gaps for MSL partners and patrons through utilization of the online MSL/SLR Learning Portal by June, 2015. (Lead staff: Christie Briggs and Erin Harris)

**(Originally reported April 2015)** Accomplished by March 2015 through making improvements to the MSL/SLR/MTBL Learning Portal by December 2014, which included adding an Aging Horizons video archive of MTBL services. This was also posted in MTBL's

Facebook page and advertised to Public Libraries, patrons and interested parties in MTBL's winter issue of the Bits of Gold newsletter. An increase in public library staff inquiries about MTBL services has been received. This is an on-going project.

**(Update: June 2015)** The MSL Learning Portal was updated with MTBL-specific content to assist public librarians with end users.

## **Goal Five—Collaboration**

5. MSL promotes partnerships and encourages collaboration among its users.

5.1. Facilitate information-sharing partnerships among federal, tribal, state and local government, businesses and citizens. Partnerships should promote the role of libraries in Montana communities, create funding opportunities for Montana libraries, and extend the reach of information services and delivery throughout the state.

5.2. Collaborate with state and federal agencies in order to improve access to public information.

5.3. Assist users in developing collaborative relationships and cooperative projects with other state, regional, national, or international partners (libraries, schools, colleges, museums, archives, local and tribal governments, non-profit organizations, government agencies, the business community, et cetera).

5.4. Assist in marketing content and services to users.

5.7. Work toward regional cooperative efforts, programs, and products that bring additional information value to Montanans.

### MTBL Specific FY15 Objectives:

- Broaden MTBL services outreach consultation to Montana families having the potential to meet MTBL eligibility by April, 2015, through consultation with Montana Housing Authority, Blind and Low Vision and Vocational Rehabilitation services, Independent Living programs, and other identified entities. (Lead staff: Christie Briggs)

**(Originally reported April 2015)** Several new MTBL contacts were made to broaden MTBL's outreach consultation to potential patrons through various organizations, facilities and agencies as identified in this objective through distribution of MTBL letters, information packets and one-to-one phone contacts. An increase in facility Demo accounts has resulted as well as better communication and collaboration of services.

**(Update: June 2015)** A presentation in 2014 to the Montana HealthCare Association sponsored education workshop for directors of Nursing homes, independent and assisted living

facilities in Montana, and to the Butte Housing Authority staff in 2015 proved to be valuable outreach areas for MTBL services.

- Schedule monthly meetings to collaborate with similar client assistance agencies, organizations and consumer groups by August, 2014, to build reliable assistive resource networks for the benefit of end user independence, education and training. (Lead staff: Christie Briggs)

**(Originally reported April 2015)** By August 2014, monthly meetings were accomplished and then changed to quarterly meetings involving a larger group of key representatives of similar client assistance agencies, organizations and consumer groups. This has resulted in building more reliable assistive resource networks.

**(Update: June 2015)** Completed in FY15 with on-going quarterly meeting follow-up and monthly emails as needed.

- Collaborate with NLS Quality Assurance and Studio Recording staff by March, 2015, in order to upload local MTBL newly recorded digital materials to the BARD online website, increasing availability of Montana titles to patrons nationwide. (Lead staff: Erin Harris)

**(Originally reported April 2015)** This deadline has been moved to June 2015, due to other priorities of the recording program as pointed out in earlier recording program objectives.

**(Update: June 2015)** Two new MTBL local digital audio books have been uploaded to BARD. More will be uploaded as time allows for the post-production quality assurance completion along with additional NLS/BARD requirements. This is a multi-step process involving collaboration with several NLS departments.

- Collaborate with the NLS Braille Specialist and Montana K-12 schools, and consultation with the Montana School for the Blind's traveling consultants, to provide education materials on the new Braille rules by May, 2015. (Lead staff: Christie Briggs, Carolyn Meier)

**(Update: June 2015)** NLS is scheduled to implement UEB in January, 2016, and the UEB planned changes, which are said to be minimal according to NLS, will be sent from NLS to each Talking Book Library at that time. NLS announced in May, 2015, that the impact on Braille patrons will be minimal. MTBL will monitor this as a new NLS project for possible changes in required local patron education.

- Research and develop potential opportunities to collaborate with local and national organization partners by June, 2015, to provide excellent host training opportunities to support training-to-work efforts. (Lead staff: Christie Briggs)

**(Update: June 2015)** The Experience Works Trainee program (adults over 55) and the Career Training Institute (high school and college student trainees) have both proven to be effective training programs requiring consistent and daily supervision and training involving all MTBL staff. The Helena Industries Veteran Work Assessment Program, added in 2014, has



been a positive addition to MTBL training partnerships. These training programs have benefited the staff in how they approach training of individuals in specific areas.

## **Goal Six—Sustainable Success**

6. MSL is efficient and effective (measured against partner and patron outcomes) and is engaged in fulfilling its mission.

6.1. Achieve and maintain funding at a level commensurate with MSL's mission.

6.2. Sustain administrative resources sufficient to support mission critical content and services.

6.3. Evaluate new and continuing content and services against MSL's mission and long range plan.

6.5. Use Federal Library Services and Technology Act moneys to support new MSL pilots and projects; and support ongoing projects using State funds.

6.6. Recruit and retain the staff necessary to meet the responsibilities of MSL's mission and Montana statutes.

6.7. Foster staff members' value and satisfaction in their achievements and their contributions to MSL's mission.

6.8. Diversify MSL's staff knowledge, skills and abilities.

6.9. Develop the leadership and management skills of MSL staff.

6.11. Provide for an information technology infrastructure which insures industrial strength capacity, and reliability.

6.12. Seek guidance from advisory groups and other sources to inform programmatic and policy decisions.

### MTBL Specific FY15 Objectives:

- Research potential opportunities to develop a Friends Group for MTBL. As recommended bi-annually by NLS, review by March, 2015, well established and successful Friends Groups from other Talking Book Libraries. The benefit would be to develop direct support of needed MTBL resources, as well as build long-range statewide awareness of MTBL services in order to reach more patrons. (Lead staff: Christie Briggs)

**(Originally reported April 2015)** Research was accomplished by December 2014. After meeting with MSL administration, it was concluded that the MTBL portion of the MSL Trust met the current needs.

**(Update: June 2015)** This was an NLS recommendation in the last NLS Consult Visit of 2013, and will be addressed during the July, 2015, NLS Consultant visit.

- Foster staff members' value and satisfaction in their achievements and contributions to MTBL by providing an annual "lunch out". (All staff)

**(Update: June 2015)** It is important that the MTBL staff be annually acknowledged for individual staff achievements by hosting a "lunch out". More importantly is the reflection of their achievements in this final report of the fiscal year to Administration and the Commission. Below are two major items that each MTBL staff member was most proud to achieve in FY15:

**Landry:**

- Maintaining continuity of service to our patrons. Given our programs reliance on volunteer help, the 2014 vacancy in the volunteer coordinator/recording supervisor position represented a serious threat to maintaining service. Through cooperation and teamwork our staff managed to maintain customer service and volunteer loyalty through this vacancy. We are fortunate to have found an able replacement in Erin Harris. It was inopportune that her hire created another 2014 vacancy in the machine lending/readers' advisory position. But again, through cooperation and teamwork our entire staff, along with volunteer assistance, were still able to maintain service to our patrons. All other accomplishments we might have, or did accomplish, would have been meaningless if we had not been able to maintain and reach our customer service goals.
- Identifying the reason for the connectivity issue that dogged the KLAS training database following the March, 2015, server upgrade. Identifying the sequence of events that resulted in the connectivity issue allowed KLAS to then correct the issue. The resolution of this issue looms even more important as we plan for training a replacement in the circulation position.

**Harris:**

- The period of time between being hired as Director of the Recording & Volunteer Programs, and hiring a Readers' Advisor/Machine Lending Agent (May 1-November 1), to replace my previous position, was difficult. Everyone on the MTBL supported one another in putting our patrons' needs first. While still taking care of patrons' needs (P-Z) and keeping the machine room running smoothly, I am proud of the accomplishments I was able to achieve in my new position. A successful Volunteer Luncheon, set-up of the Recording Studio with new equipment and learning the new HABC recording software, and writing a training manual were all done within this six month period.
- I am also particularly proud of creating the HABC training manual and volunteer training schedule. The training of the recording teams has gone very smoothly, and it has been delightful watching them learn and enjoy the new software.

**Crepeau:**

- Although Bits of Gold is on my work plan and I certainly do not do it alone, I believe that the newsletter looks very professional and is full of valuable content for patrons–

machine information, book recommendations, etc. I am proud that many patrons have indicated they find useful information in it, and glad it is now available in multiple formats.

- Customer service – I have successfully walked several patrons through the BARD downloading process, and they are doing it on their own now. All MTBL staff deliver excellent customer service. Specific to myself, very few of the applications take more than 1 day after phone interviews and I receive the paperwork to send out equipment and books from the other MTBL Readers' Advisors. An example of a satisfied patron is one of matching them to a book they were unaware of previously. The patron was willing to try it on my recommendation. After he listened to it, he bought a print copy and it is going through their family and friends now.

### **deMontigny:**

- In June, 2015, I will be graduating from the University of Washington with a Master's Degree in Library Science. Much of my focus has been in the areas of special librarianship, patron services, outreach and teaching. This is not only a large personal milestone but a positive use of continuing education as an employee. This personal goal directly applies to goals 6.8 and 6.9 for employee training and diversification of staff knowledge, skills and abilities.
- Arranged a connection between MTBL and the Yankton Machine Repair site in South Dakota. I have arranged to send boxes of machines the Telephone Pioneers are unable to fix to this site. They assess the machines further and make additional changes or repairs. With their permission some patrons are being sent these refurbished machines to see how they work under regular use. I am getting remarkably few negative responses. They will continue to test the machines until August.

### **Meier:**

- I've been able to weed nearly all of the archival copies of cassettes for listing in the July 2015 scheduled Xess process. In addition, most of the cassettes in the Random shelves have been marked and weeded down to one copy. This totals nearly 40,000 cassette copies, moving MTBL toward eliminating the cassette copies except for copies only available on cassette.
- I've also been able to weed and delete digital book copies that are no longer circulating, going above and beyond the NLS annual quota for MTBL. This allows us more space for incoming new digital book copies without expanding beyond our shelf space capacity.

### **Briggs:**

- Hired two excellent staff members in 2014: Erin Harris into the Director of Recording and Volunteer programs and Bobbi deMontigny into the Readers' Advisor positions, and supporting them with MTBL staff coverage and training during a very difficult time from May, 2014-April, 2015.
- Collaborated with NLS staff to receive a substantial amount of blank digital cartridges and containers from May-July, 2015, provided by NLS for Duplication on Demand. This will enable MTBL to provide more in-house book copies to meet patron demands without draining internal funding resources to accomplish, as well as re-direct MTBL resources to other priority areas.

- Foster volunteer value and satisfaction in their contributions with an annual formal appreciation luncheon. (Lead staff: Erin Harris, Christie Briggs)

**(Originally reported October and December 2014)** Accomplished by October 2014. The impact on volunteers was the overwhelming positive feedback of the success of the 2014 annual volunteer appreciation luncheon, as seen through the on-going support of MTBL services from volunteers.

**(Update: June 2015)** Harris successfully planned, organized, and orchestrated a lovely and well received 2014 annual volunteer appreciation luncheon on short notice. In her new position as Director of Recording & Volunteer programs, she was also covering (with the help of the other MTBL team members) her previous RA and machine lending duties. The MTBL Team also readily assisted with the luncheon. The 2015 annual volunteer appreciation luncheon is currently being planned and is scheduled to be held in October, 2105.

- Establish an Advisory Group to MTBL by June, 2015, with representation from six communities, made up primarily of MTBL consumers, BLVS, VA VIST, MAB and NFB-MT representatives, to review and make recommendations to the Regional Librarian regarding MTBL services. To meet quarterly via teleconference. (Lead staff: Christie Briggs)

**(Update: June 2015)** More immediate MTBL priorities in 2014/2015 included two vacancy positions needing to be filled in 2014 and new staff trained in 2014/2015, as well as Meier's retirement as Circulation Manager after 31 years, at the end of May. Due to lack of time, vacant positions, and hiring and training of new staff, this objective was not met and will be reviewed as a possible FY16 objective.