Montana State Library

Statewide Library Resources Division-Library Development

FY 2016 Work Plan

July 1, 2015-June 30, 2016

Discover It!

The mission of the Montana State Library's Statewide Library Resources Division is stated within the overall agency's mission in the current MSL Long Range Plan for 2012-2022:

"The Montana State Library is committed to strengthening libraries and information services for
all Montanans through leadership, advocacy, and service."

As part of the efforts to meet this mission, SLR strives to help all Montana citizens receive the information they need in order to improve and enhance their lives by:

- Improving public library services
- Promoting cooperation among all Montana libraries of all types

SLR provides leadership and guidance related to library programs, services, and facilities. SLR staff plans, develops, and implements programs, projects and pilots, and administers funds for new and improved library services throughout the state.

This work plan is developed based on the goals contained in the MSL 2012-2022 Long Range Plan.   Specific work objectives for FY2016 are organized by the MSL six agency-wide Long Range Plan goals. Together, these objectives represent a collective approach to defining the highest priority tasks for SLR for FY2016. Where lead staff is identified for an objective, it is understood that other Library Development staff may participate in the overall effort to successfully meet that objective. Additionally, though specific staff has been identified under each objective, other SLR-LD staff will often collaborate in order to successfully carry out these objectives.

The Talking Book Library's FY2016 work plan is submitted separately.

Goal One—Content
MSL acquires and manages relevant quality content that meets the needs of Montana library users.

1.1. Enhance Montana State Library's statewide e-content subscription and purchase programs.

1.2. Work collaboratively toward developing, managing, presenting, and preserving Montana-relevant digital content.

<p align="center">SLR Work Objectives:</p>

- Working with the MontanaLibrary2Go Executive Committee, develop a request for information in FY16 to gather information about other consortium models available through different e-content vendors. This will provide the consortium

with more information to help assess value of existing contract and make informed decision for contract renewals going forward. *(Orban)*

- Working with the MontanaLibrary2Go Executive Committee, review the current use of member library funds in the MontanaLibrary2Go annual budget and develop at least one different budget scenario that may address the need to cover both content and the annual hosting fee, where amount of available LSTA or patron counts may be variable. The desired outcome is a sustainable and affordable budget model to implement in FY17. *(Orban)*

- Run a test period with the live MontanaLibrary2Go Local pilot in which usage statistics and participant feedback is collected. Prepare a summary report detailing the pilot's objectives, work accomplished, how and why desired outcomes were or were not met, and recommendations for moving forward. Outputs and qualitative feedback from pilot participants will be collected and a report generated detailing knowledge and experience gained from the pilot which may be useful internally as well as to other libraries or library groups considering e-content management options. *(Orban)*

- Develop and articulate a method and schedule for collecting and evaluating statistics on content and access provided through LSTA funded projects in order to better understand effectiveness and use of identified statewide projects, and to streamline reporting tasks throughout the year. SLR staff will receive training on how to evaluate statistics. The expected outcome is that SLR staff managing identified statewide projects have access to sets of statewide statistics that represent standard periods of time, and that can be divided into smaller groups (library type, size, geographic region) as necessary. SLR staff will gain knowledge about statistics evaluation that will make data collection a more useful tool for improving services and training and outreach strategies, and for communicating the value of SLR content and services to stakeholders. *(Lead: McHugh)*

- Following reorganization of SLR and Learning Portal websites, develop a plan with Learning Portal and SLR Portal groups to study Google Analytics reports and carry out usability testing to better understand areas that may continue to need improvement. *(Lead: McHugh)*

- Present community engagement training and support at Fall Workshops, MLA retreats, MLA conference session and other meetings as appropriate, in order to develop an inventory of strategic partnerships and practices that can be shared with libraries statewide. Partnership areas include digital collections, digital inclusion, health information/insurance literacy, agriculture, and support for education. *(McMullen)*

- Identify 8-10 communities on the HI-line in Montana that have rich collections of unique materials related to Montana's economic, social, cultural or political history or materials that document a more current transition, such as the Bakken project. Encourage these communities, in partnership with their local library, to add these collections to the Montana Memory Project. *(Birnel)*

- Collaborate with staff of the Montana Historical Society and the Montana Office of Public Instruction to create classroom lesson plans for the Montana Memory Project so that teachers can easily incorporate this resource into their yearly teaching activities. *(Birnel)*

- Explore in collaboration with UM, MSU, and The Montana Historical Society the possibility of becoming a direct service hub to the Digital Public Library of America. As a service hub we would send Montana Memory Project items to the DPLA and aggregate and harvest other Montana digital repositories to share with the DPLA. *(Birnel)*

- Continue to seek a solution for individuals to share Montana related content through the Montana Memory Project, acting as a portal of discovery. *(Birnel)*

- Continue working on launch of new EBSCOhost e-book collection. The outdated MSC "NetLibrary" collection was inherited by EBSCOhost when it was purchased from OCLC. The collection is out of date and needs to be refreshed with updated content and returned to the MSC database for discovery. *(Adams, Price)*

- Collaborate with vendors and the MSC Content Management Committee to bring the MSC catalog into full compliance with RDA standards. Cataloging best practices need to include RDA standards not to bring the catalog in compliance but also to take advantage of enhanced displays in discovery platforms. *(Adams, Hazen)*

Goal Two—Access
MSL provides libraries, agencies, and its partners and patrons with convenient, high quality, and cost-effective access to library content and services.

2.1. Improve the user interface of MSL's Web sites and improve and expand online service 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.

2.5. Assist Montana libraries with 'fulfillment', that is, getting the right library content into patrons' hands quickly, efficiently, and at prices that libraries can afford, regardless of whether the item is owned by the patron's local library.

2.6. Publicize Montana State Library's services and resources.

2.7. Support Montanans' continued free access to the Internet provided through local public libraries.

2.8. Actively investigate and implement, as appropriate, web-scale solutions including web-scale integrated discovery systems, cloud computing, centralized indexing and harvesting of content, to make the resources of Montana libraries discoverable in a single search.

<u>SLR Work Objectives:</u>

- Work with the Courier Advisory Board to review the current cost sharing structure, with the desired outcome of making the courier an affordable option for lower volume libraries. *(Orban)*

- Look for opportunities to extend courier service between Havre and Browning and develop a plan for sustaining service beyond this contract period which runs through December 2016. *(Orban)*

- Review authentication processes and authentication testing for statewide projects. Using authentication statistics and gathering feedback from library staff, determine which methods are working for libraries actively using statewide services. An expected outcome is that MSL staff gain a better understanding of how authentication is enabling or deterring library staff and patrons from using services, how any problems could be resolved and gains an understanding of current authentication options. *(Orban and Price)*

- Contribute to the redesign of the My Montana Library website, with a focus on three major areas: Statewide Projects and Services, Community Partnerships, Montana Culture. This project is undertaken in order to improve the existing site by making it more responsive to direct library end user expectations. *(Orban, McMullen, Groves)*

- Create a "Montana Public Library Websites" cohesive effort so that all public libraries will have vibrant websites that provide excellent virtual services to their communities, including local access to statewide resources. *(McMullen, Henley, Reymer)*

- Create a promotional campaign about the MSL consulting program, which may include an improved web presence, brochures and/or newsletters. Library directors and trustees will become better informed about consulting services available to them because of this campaign. *(McMullen, Henley, Reymer, Groves)*

- Launch an RFP process to seek options for new MMP software. The RFI done in FY 2015 revealed there are several new vendors offering services that compete with our current solution, CONTENTdm. This RFP will determine if there is a better alternative for usability and costs. *(Birnel)*

- Work to improve Search Engine Optimization (SEO) of the Montana Memory Project. Create a Wikipedia entry for the MMP, so that it is recognized as a trusted source. Measure success through the use of Google Analytics. *(Birnel)*

- Continue to coordinate development of both DiscoverIt and the new Enterprise front end to the MSC catalog in an effort to reach library users in either environment, meeting the user wherever they may be searching *(Orban, Adams)*

- Participate in evaluation and testing of the MSC's cloud-based library management system as it is rolled out by the vendor. Along with providing support to members as they learn about the new products, our participation will help ensure vendor development of cloud based cataloging, circulation and acquisition interfaces includes functionality required for consortia. *(Adams, Marchwick, Hazen, Goodwin, Price)*

- Complete MSC Enterprise online catalog implementation for all MSC libraries and discontinue use of the older iBistro/eLibrary interface. Ending local support for eLibrary will reduce staff workload. *(Adams, Price)*

- Increase use by MSC member library staff of mobile devices and services available for interface with the MSC library management system enabling them to keep current with technology as it trends toward a more mobile user environment*(Adams, Marchwick, Hazen, Goodwin, Price)*

- Investigate the potential of a centralized RFI process for at least some pieces of the E-rate program in order to better support those libraries wishing to take advantage of new discount opportunities in the program. *(Reymer)*

- Investigate the possibility of regional, consortial contracts for more uniform broadband services and pricing within E-rate program and without, in order to determine if an effort like this is feasible and would produce benefits to participating libraries. *(Reymer)*

- Stay involved with and attuned to national and state initiatives related to broadband development during this time of significant national and state discussions related to broadband needs, in order to ensure that Montana libraries stay informed and have a voice. *(Reymer)*

- Contribute to the planning for and implementation of the rewrite of the Montana Library Directory with a focus on current and future uses of this statewide library tool. *(Leads: McHugh, Price)*

Goal Three – Training
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.

3.2. Provide users with trainings and assistance related to statewide offerings and resources.

3.3. Develop and present appropriate library leadership training for Library Directors and Trustees.

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.

<u>SLR Work Objectives:</u>

- In response to the increasing turnover in public libraries as directors enter retirement, focus on training needs of new public library directors to provide essential information and skills. Develop a comprehensive training curriculum for new public library directors that utilizes the COSLA New Directors 101 series and supplements that with Montana-specific self-paced online tutorials. *(Lead: Flick)*

- Using Camtasia, develop one tutorial each month for Statewide Projects to meet needs unique to Montana libraries and not available through vendors. This would result in higher statistical use and higher level of interest in statewide projects, as indicated by statistical reports and by number of monthly inquiries. Less time spent answering repetitive questions about a process that could be demonstrated

through a recorded tutorial, indicated by online visits to tutorial. *(Leads: Orban, Flick, Goodwin)*

- Establish a school library liaison for coordinating efforts in training and outreach on EBSCO content and services. This will provide more meaningful information sharing between school libraries and MSL results in higher use of existing services and/or better understanding of how services could be improved to meet student needs. *(Orban)*

- Transition responsibility of makerspace pilot trunks to federations. Federations' responsibilities will be to facilitate movement of the trunk within the federations. The Statewide Projects Librarian will continue to provide a basic orientation to new hosting libraries and to collect signed paperwork and statistics from hosting libraries. Keeping the makerspace kit within the federations allows MSL staff to focus less on the time-consuming matter of statewide logistics for six trunks and more on targeted training that will benefit libraries hosting the trunks. *(Orban)*

- Present at least 3 strategic planning trainings to public library directors and boards, to include succession planning where needed. This is in response to the continuing training requests for strategic and succession planning, as directors and boards change. Make better use of resources created by COSLA and other regional and national organizations by organizing links in the learning portal and developing a flyer to inform library boards of material and training available. *(McMullen, Henley, Reymer, Flick)*

- Present at least 3 board development trainings to public library directors and boards, focusing especially on those libraries that have new directors or boards. *(McMullen, Henley, Reymer, Flick)*

- Produce short, on-demand webinar trainings about creating high impact reports and presentations to tell the library story using data from the Public Library Statistics. *(McMullen, with other MSL staff)*

- Continue to develop an MSC plan to address staff turnovers in MSC libraries, particularly schools to ensure that new staff receive information and training from MSC staff in a timely manner. *(Adams, Goodwin)*

- Develop training curriculum for new MSC software and services in order to ensure consistent training resources are available to all MSC sites *(Goodwin)*

- Recruit trainers from the MSC membership to assist with the MSC training program in order to increase regional on-site training opportunities and share knowledge among MSC library staff members *(Adams, Goodwin)*.

- Recruit new participants for and coordinate the statewide Montana Name Authority Cooperative Funnel (NACO). This ensures that Montana-specific Name Authority Records for original works are being created in the Library of Congress and WorldCat. Organize a refresher training for interested Montana NACO Funnel members. *(Hazen)*

- Organize a train-the-trainer meeting over winter with MSL trainers to review the use of the universal evaluation instrument developed in FY15, make revisions as needed, and determine best practices for harvesting, analyzing and sharing information gathered with the tool*. (Flick)*

Goal Four—Consultation and Leadership

4.2. Advise Montana Library Directors and Trustees regarding administrative concerns, such as funding, budgeting, policies, and personnel.

4.3. Establish and maintain contact with Library Directors and Trustees, and other MSL partners, to remain cognizant of their needs and the challenges they face.

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.

4.8 Facilitate more state-wide purchases of content, supplies, and programs that benefit all Montanans through their local libraries.

<u>SLR Work Objectives:</u>

- Assist the MSC Executive Board in their work to complete the MSC Strategic Plan and their review and update of MSC by-laws and contract. *(Adams and McHugh)*

- Produce additional information resources for districts, such as a template of legally-mandated policies and guidance about board education. *(McMullen, Henley, Reymer)*

- Research and develop economic models intended to illustrate the benefits of shared administrative infrastructure in library districts, multi-library systems and other partnership arrangements. Examples might include: cost savings and efficiencies to be gained if county-wide standalone libraries merged into a single county library, or outsourced administrative services that could be provided for district libraries. This report will inform public library directors and trustees about options as they make future decisions for their libraries. *(McHugh, McMullen, Henley, Reymer)*

- Update the SLR Learning Portal training resources related to public computing centers, to provide current information to public libraries as they offer this kind of resource to their communities. *(Reymer)*

- Working with the Montana Library Association, develop a mentorship program to support new public library directors. This would create a partnership between experienced and new directors, offering increased support and possibly reducing chronic turnover in rural libraries. *(Henley)*

Goal Five—Collaboration
MSL promotes partnerships and encourages collaboration among its users.

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).

5.5. Assist partners in developing web-accessible Montana-related digital content, and provide Montanans with access to digital collections and items relating to Montana's cultural heritage.

5.6. Promote library-related automation, data, networking standards, and web-scale solutions.

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

<u>SLR Work Objectives</u>

- In partnership with MLA, develop a robust online community where Montana librarians, staff and trustees can share information and resources, solve problems together, and collaborate to provide better services in their communities. *(Lead: McMullen)*

- Complete the MSC system policies reorganization effort. This work re-aligns the MSC with its original goals of enhancing optimum resource sharing and library development among MSC members and striving to keep MSC staff costs down. *(Adams, Marchwick, Hazen, Goodwin, Price)*

- Encourage cataloging partnerships between MSC libraries with the aim to leverage the cataloging staff at larger libraries to help smaller libraries who do not have dedicated cataloging staff. *(Hazen)*

- Produce resources about the creation of library branches, including existing documents and suggestions for best practices. The branch option may in some cases offer greater access to library services in smaller communities, at lower costs, and increase usage of statewide resources. *(Henley)*

Goal Six—Sustainable Success
MSL is efficient and effective (measured against partner and patron outcomes) and is engaged in fulfilling its mission.

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.

6.7. 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.

<u>SLR Work Objectives:</u>

- Work together to provide additional and more consistent training on the content of our SLR webpages with the goal of significantly increasing the ability of all SLR staff to quickly, efficiently and successfully find answers on the SLR site to questions they are asked by external users, instead of passing the question on internally, wherever possible. *(Lead: McHugh)*

- Renew our focus on improving the existing SLR website to make the information and format on the individual project pages more consistent, where relevant. *(Lead: McHugh)*

- Create a standardized, consistent approach to managing directories and content on the internal SLR drive so that information available there is more easily retrieved. This work will include instituting appropriate archiving practices. *(Lead: McHugh)*

- Create an internal tool using OneNote software to better manage internal communication and planning related to specific internal SLR efforts, such as

news and announcements, reports and work plans and event planning. *(Lead: McHugh)*

- Complete the process of adding all remote SLR staff to the virtual desktop environment to significantly improve staff ability to easily and quickly access the same internal storage used by Helena based staff. (*Lead: McHugh*)

- Continue to work with other MSL managers to identify a possible project management tool that will be available to all staff for the purpose of implementing and managing various pilots, projects and programs of all kinds, as needed. *(Lead: McHugh)*

- Provide at least one training session for SLR staff to lead them through the new LSTA reporting process. *(Orban)*

- Evaluate future hardware requirements for the MSC system and explore the possibility of using virtual machines or hosted services. *(Leads: Adams, Price, Marchwick, McHugh)*

- Develop a plan to harvest certification application data and CE tracker data in order to create a report schedule and a statistical analysis plan. This schedule and plan will inform SLR staff about the trainings in which librarians are engaging and current training needs. *(Leads: Flick, Price)*