

Library Services & Technology Act

FY2014 State Program Report

Montana State Library

Financial Status Report

General Information

Federal Grant or Other Identifying Number Assigned by Federal Agency: LS-00-14-0027-14

Total Federal Funds Authorized for This Funding Period: \$ 1,059,170.00

Period Covered by This Report

Start Date: 10/01/2013

End Date: 09/30/2015

Total SLAA funds expended to meet the purposes of LSTA, including the Five-Year-Plan (MOE):
\$709,476.00

Minimum MOE Required: \$ 705,358.33

MATCH-State funds expended specifically on the Five-Year Plan: \$ 706,132.50

MATCH-Other funds expended specifically on the Five-Year Plan: \$ 877,896.00

Total Match: \$ 1,584,028.50

Minimum Match Required: \$ 545,633.03

All other recipient outlays not previously reported: \$ 0.00

Total unliquidated obligations (expected to clear by Dec. 30 or later IMLS-approved date): \$ 0.00

Unobligated balance of Federal funds (these funds to be deobligated): \$ 0.00

Federal share of net outlays: \$ 1,059,170.00

LSTA Administrative Costs

Allowed: \$42,366.80

Actual: \$42,366.80

Difference: \$0.00

Administrative Project

General Information

Abstract: The Statewide Cost Allocation Plan (SWCAP) fee is a requirement for each state agency that receives funding from the federal government. The Montana Department of Administration annually prepares a statewide cost allocation plan. This plan distributes service agency indirect costs among the grantee agencies in accordance with principles and procedures established by federal regulations and guidelines. SWCAP costs are for services provided without charge to the recipient agency and for services provided with an interagency charge or billing. SWCAP costs must be incorporated into the indirect costs submitted by each state agency to its cognizant federal agency. The SWCAP fees are direct billed to agencies on a quarterly basis. If an agency cannot pay the entire allocated share of SWCAP costs from non-general fund sources, it must make up the difference from its management services/central services cost pool of a general fund appropriation.

In addition to SWCAP fees, the Administration Project includes MSL Central Services staff that sets up appropriate financial categories for each project, manages all accounts payable, prepares regular drawdowns, and writes and issues checks as appropriate. All LSTA projects are tracked to ensure that each request for reimbursement is appropriate and in accordance with stated project goals before expenditures are approved for payment.

In addition, it is required that all LSTA grant funds be input into the state financial system so bills and payments can be tracked for the State of Montana financial reports. Project staff prepares federal cash transaction reports and are vigilant that the agency is in compliance with federal and state rules and regulations at all times. During this report period, this project also acted as fiscal agent for the Montana Shared Catalog and served as the fiscal agent for the purchase of statewide products such as MontanaLibrary2Go (downloadable audio and e-books) collecting fees from participating libraries and making all payments to the appropriate vendor.

The LSTA Coordinator, paid by state general funds, provided oversight for the use of the grant award by assuring projects were in compliance, agreements were transacted, requirements were understood and enforced, questions and concerns were communicated to the IMLS State Program Officer, and all documentation needed for the State Library to remain eligible to receive LSTA funds was completed and submitted by deadlines.

Intent: Administer the LSTA Program

Grantee: Montana State Library

Start Date:07/01/2014

End Date:09/30/2015

Total Project Budget: \$42,366.80 FY14 LSTA

Montana Memory Project

Exemplary: YES

Exemplary Narrative:

During this reporting period, the Montana Memory Project Director facilitated the digitization of six collections for the Digital Public Library of America's Public Library Partnerships Project (PLPP), funded by the Bill and Melinda Gates Foundation, which worked with existing DPLA Service Hubs to provide digital skills training for public librarians and connect them sustainably with state and regional resources for digitizing, describing, and exhibiting their cultural heritage content.

The resulting exhibition, *Boom and Bust: The Industries That Settled Montana*, was published September 1, 2015 on the Digital Public Library of America website. This exhibition told the story about Montana, why it was settled, and how its industries have impacted the environment and the people who live there.

The Montana Memory Project Director participated in the creation of the self-guided curriculum that is now available on the DPLA website. This curriculum provides videos guiding people through the process of creating a digital collection. It follows the same training protocol that was offered in the live training sessions conducted as part of the PLPP.

In this project, DPLA worked with state and regional Hubs (Digital Commonwealth, Digital Library of Georgia, Minnesota Digital Library, Montana Memory Project, and Mountain West Digital Library) to write and iterate a workshop curriculum based on documented best practices. This curriculum is available in a self-guided version intended for digitization beginners.<http://dp.la/info/about/projects/public-library-partnerships/>

Following this effort, the Montana Memory Project Director had plans in the next reporting period to participate in a Tech Soup national webinar for library staff to discuss the project and the resulting curriculum.

Abstract: The purpose of the Montana Memory Project (MMP) is to support the creation of and provide free access to digital collections of items relating to Montana's cultural heritage and government. The collections encompassed 859,965 items at the end of this reporting period, varying from artwork to oral history interviews, photographs, and print materials such as maps, yearbooks, government records, historic civic documents, journals, and correspondence. The MMP is sponsored by the Montana State Library and the Montana Historical Society.

A full-time director employed by the State Library oversees all facets of the project, including the addition of new collections, site design, organization and updates, communicating with the MMP contributors and managing annual costs and new purchases. An Advisory Council supports this project by increasing the visibility of the MMP to new contributors, increasing the visibility and usability of the MMP to new audiences, and by finding opportunities to fund new collections.

The MMP is a partner of the Mountain West Digital Library (MWDL), which is a central search portal for digital collections about the Mountain West region. The MWDL is a Service Hub for the Digital Public Library of America (DPLA). As a Hub, MWDL collections are harvested for display in this national search portal.

State Goal: Access to Quality Content

Director Name: Jennifer Birnel

Additional Materials

☞ <http://www.mtmemory.org>

☞ <https://m.facebook.com/MontanaStateLibrary.MMP>

Budgets

Salaries/Wages/Benefits

Description

\$62,721.46 in FY14 LSTA for one full time Montana Memory Project (MMP) Director salary and benefits
\$1,761.88 in FY14 LSTA for outreach and promotions staff salary and benefits Additional hours for the State Library Communications Coordinator to work with a local company called Edge to boost MMP Facebook posts through paid advertising.

MATCH: \$800 for in-kind match for four hours of 10 MMP Advisory Council members' work time

Travel

Description

\$5,107.39 in FY14 LSTA for travel to outreach visits Outreach is described under the outreach activity.
\$597.39 in FY14 LSTA for MMP Director travel expenses to attend Montana History Conference The MMP Director hosted an information booth at this conference where she demonstrated to interested individuals and groups how to use the website and what types of content can be found on the MMP and the Digital Public Library of America (DPLA), and distributed promotional posters and bookmarks to raise awareness about the MMP website.

\$485 in FY14 LSTA for registration at state conferences as part of State Library job duties

Supplies/Materials

Description

\$94.83 in FY14 LSTA for printing of 300 brochures for potential contributors

MATCH: 2,500 posters were printed and paid for by the Montana Historical Society

Services

Description

\$8,443 in FY14 LSTA for CONTENTdm software

MATCH: \$9,678 from the Montana Historical Society OCLC CONTENTdm is software that handles the storage, management, and delivery of digital collections across the web. CONTENTdm stores images, newspapers, books, maps, and audio/video files.

\$2,587 in FY14 LSTA for Digital Archive software

MATCH: \$4,387 from Montana Historical Society OCLC's Digital Archive provides digital preservation for all digital files. Master files and digital originals are securely stored in a purpose built environment.

\$7,169.60 in FY14 LSTA for Advantage digitization services (described under digitization activity)

\$350 in FY14 LSTA for contracted design work for MMP promotional materials The State Library contracted with a graphic designer to create the promotional MMP poster "Montana Memories at your Fingertips" (attached to this report).

\$13,854.06 in FY14 LSTA for one full time temporary MMP technical assistant salary During this reporting period, a temporary technical assistant was hired on contract to provide support to contributing institutions on the use of MMP related programs, including CONTENTdm's Project Client; provide training and advice on adding images, objects, and metadata to collections and on creating Dublin Core metadata records for digital items; update the MMP webpage to create new collections, new contributing institutions, lesson plans and other relevant content; post regularly to the MMP Social media sites; and complete other technical and training support duties as directed by the MMP Director.

Other Operational Expenses

Description

\$581.74 in FY14 LSTA for staff telephone

\$59.39 in FY14 LSTA for miscellaneous office supplies for MMP Director

Intents

Improve users' ability to discover information.

- Education
- History

Project Activities

Activity Details

Title: Digitization of New Collections

Abstract:

The State Library used FY14 LSTA funds to digitize collections from seven institutions for inclusion in the MMP. Most of these digitization efforts were outsourced to a company called Advantage, with the exception of a collaborative effort between the City of Helena, Montana, and the University of Montana.

The collections consisted primarily of photographs, but also included yearbooks, magazines, scrapbooks, documents, letters, ledgers, and books.

Collections digitized by Advantage:

1. Montana State University Northern yearbooks
2. Billings Public Library: Images of people and events in Billings
3. Missoula County Public Schools: Bitterroot yearbooks collection
4. Drummond School-Community Library: New Chicago schoolhouse
5. Lewis & Clark Library and Great Falls Women's Club: Montana Woman magazine collection
6. Missoula Public Library: Historical neighborhoods of Missoula

Collection digitized at the University of Montana with funding from LSTA:

1. City of Helena, Montana city council minutes, 1881-1970

Additionally, six collections were digitized for the Digital Public Library of America's Public Library Partnerships Project (PLPP), funded by the Bill and Melinda Gates Foundation, which worked with existing DPLA Service Hubs to provide digital skills training for public librarians and connect them sustainably with state and regional resources for digitizing, describing, and exhibiting their cultural heritage content.

Participants in the PPLP pursued their own digitization projects with support from the Hubs and received follow-up training in creating digital exhibitions to tell stories with their content. With participant support and review, Hubs organized digital exhibitions to showcase this newly digitized content.

Montana participants submitted these collections to the PPLP:

1. Judith Basin County Free Library, Hobson: Early agriculture and homesteading in Judith Basin County
2. Judith Basin County Free Library, Stanford: Sheep ranching in Judith Basin County

3. Butte-Silver Bow Public Library: Butte history collection
4. Missoula Public Library: History of the Missoula Public Library
5. Billings Public Library: Images of people and events around Billings
6. Madison Valley Public Library: County history books

Activity Details

Title: MMP Training

Abstract:

During the reporting period, staff conducted training for library staff and educators on the following topics:

Technical training on use of the CONTENTdm Project Client software for uploading digital items and metadata (data that describes the item) and on the creation of quality metadata records that accurately describe items and allow them to be easily discovered. (48 online sessions and 1 in-person session, with an average of two library staff in attendance.)

Introductory training on "how to use the MMP" (four in-person sessions, with an average of 12 library staff in attendance.)

Introductory training on "how to use the Digital Public Library of America (DPLA)" (1 in-person session with 35 library staff in attendance.)

Training on the Public Library Partnerships Project (two in-person sessions, with an average of 14 library staff in attendance.)

The Digital Public Library of America's Public Library Partnerships Project (PLPP), funded by the Bill and Melinda Gates Foundation, worked with existing DPLA Service Hubs to provide digital skills training for public librarians and connect them sustainably with state and regional resources for digitizing, describing, and exhibiting their cultural heritage content.

Participants in the Public Library Partnerships Project pursued their own digitization projects with support from the Hubs and received follow-up training in creating digital exhibitions within the DPLA to tell stories with their content.

Training sessions varied in length between 65 - 360 minutes, for an average of 85 minutes.

Activity Details

Title: Montana Memory Project Outreach to Libraries

Abstract:

The MMP Director conducted 26 outreach visits to prospective contributors to the MMP collection during the reporting period. During each outreach visit, the first hour covered the MMP website, highlighting the content currently available and how to make the most of the website's resources. The MMP Director then discussed the process for contributing new collections to the MMP. The Director spent the final hour with staff reviewing the institution's collection materials and their potential for digitization, as well as brainstorming ideas for content from the local community that would be valuable additions to the MMP.

The MMP Director visited prospective contributors in these Montana communities:

Augusta
Billings
Boulder
Chinook
Choteau
Conrad
Cut Bank
Ennis
Fort Benton
Glasgow
Hardin
Harlem
Havre
Laurel
Lincoln
Malta
Plentywood
Poplar
Scobey
Twin Bridges
Valier
Virginia City
Wolf Point

Project Outcomes

List any important findings or outcomes from your project:

The Montana Memory Project added 25 new collections of content during this reporting period. Seven of these collections came from first-time contributors, all of whom were contacted through previous outreach efforts. In July 2014, the MMP Director created a Facebook page for the MMP (linked from this report) which showcases daily posts from the MMP digital collections. At the end of this reporting period the page had gained 2,578 followers. The State Library contracted with a graphic design artist to create a poster to promote the MMP to end users. The MMP Director distributed the poster to schools, libraries, and museums across the state. These promotional efforts have improved website traffic compared to the previous reporting period. Website traffic has increased by 30% overall (from 95,709 to 124,769) and new users have increased by 26% (from 64,735 to 81,682). The number of page views has increased by 18% (from 449,971 to 532,678).

Please briefly describe importance of findings.

These outcomes indicate that the Montana Memory Project continues to attract a wide variety of users and interested contributors. In partnership with contributing Montana institutions, the MMP Director continues to add more content to the online collection, creating greater representation for a broader portion of the state. Additionally, this content is being used by a larger audience than in the previous reporting period.

What methods did you use to determine your findings? Check all that apply.

Review of Administrative Data

Do you anticipate continuing this project after the current reporting period ends? Yes

Do you anticipate any change in level of effort? Yes

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. The Task Force recommendations addressed lifelong learning initiatives in libraries, and the need to support community engagement, tell the community's story, promote educational values, and inspire new channels of learning. The mission of the Montana Memory Project is closely aligned with these recommendations, and so the State Library expects that the scope and level of support for this project may change in the next reporting period.

Information Access Project

Abstract:

The purpose of the activities listed in this project is to fulfill the goal of the State Library to provide libraries, agencies, and partners and patrons with convenient, high quality, and cost-effective access to quality information. In doing so, the State Library supports a more informed citizenry, and facilitates resource sharing among libraries, which reduces costs to their local communities.

The statewide Montana Shared Catalog (MSC) consortium exists to encourage the sharing of resources, knowledge and expertise among its multi-type library members. Libraries that are part of the consortium during this reporting period participate in its shared SirsiDynix Integrated Library System (ILS) to offer their patrons access to the collections of 177 Montana libraries of all types. Users can explore enriched content, including downloadable audio and e-book collections and statewide database subscriptions, within a single search. Most significantly, because of their use of standard data and software protocols, MSC is the statewide platform for developing, implementing and launching new library development services across Montana. Some of these ventures include the expansion of the Montana Courier Alliance and a more centralized, cost efficient approach to technical services.

272 libraries across Montana relied on the State's OCLC Group Services contract to provide library staff with discounted access to unlimited interlibrary loan and cataloging tools. These tools allow libraries to efficiently create accurate, descriptive item records so that Montana residents can easily discover and request these items through their local libraries.

The Montana State Library provided a diverse suite of 24 EBSCO statewide research databases for all Montana citizens. This suite was made possible through an allocation from the Montana Legislature, and through support from the Governor's budget office and the efforts of the State Librarian, the State Library Commission, and the Montana Library Association.

Any Montana library that was listed in the Montana Library Directory had access to these online resources. Additionally, all libraries in Montana had access to customizable EBSCO Discovery Service profiles. EBSCO Discovery Service (known as "Discover It!" in Montana) is an integrated search tool designed to perform a comprehensive search of multiple online resources, from catalogs to databases to digital collections, to which libraries subscribe. This tool saves the user's time by eliminating the need to replicate a search in multiple search interfaces.

State Goal: Access to Quality Content

Director Name: Sarah McHugh

Budgets

Salaries/Wages/Benefits

Description

\$69,536.40 in FY14 LSTA for the Montana Shared Catalog (MSC) Director position salary and benefits
The MSC Director coordinates Shared Catalog program planning and development, systems administration, technical assistance, program administration, special projects and events, assistance to other State Library work units and state and local agencies, meetings and conferences, and supervision of project staff.

\$105,690.40 in FY14 LSTA for salary and benefits for two positions, the MSC Systems Technician (13.2 hours per week funded by LSTA) and the Information Specialist

The Library Systems Technician is responsible for coordinating and facilitating the addition of new libraries into the MSC, providing ongoing technical support for all MSC member libraries and their staff, and assisting the MSC Director with administrative, public relations, training, and technical tasks. The Information Specialist is responsible for database development and administration, network planning, interface design, construction, and administration, application development, Internet/web administration and security, software and hardware planning, implementation, and support, and user support and training.

\$560.98 in FY14 LSTA for salary and benefits for Communications Coordinator's work on this project for the MSC

MATCH: \$600 for 50 hours of public library staff time spent assisting new MSC library members in cataloging their materials in preparation for joining the Montana Shared Catalog

MATCH: \$2,160 for 108 hours of MSC Executive Board meeting time The nine-member Executive Board is comprised of representatives from each type of library. These members represent the interests of other libraries in the consortium. The Executive Board presents budget and policy proposals to the full membership.

MATCH: \$2,240 for 112 hours of MSC Content Management Committee meeting time The primary functions of the 14-member Content Management Committee are to promote consistent item records, cataloging and circulation practices, and to maintain a functional and attractive user interface within the MSC Integrated Library System (ILS) software. The Committee is responsible for the regular review and revision of the Standard Cataloging Procedures for member libraries. The Committee also participates in training, and Committee members actively participate in the MSC-discuss e-mail list, the MSC technical services e-mail list, and the Symphony software e-mail list for catalogers. They also make recommendations for enhancements to the ILS based on membership and Committee discussion.

MATCH: \$19,249.50 from the State for the Statewide Projects Librarian position's work on these activities This position manages the OCLC Group Services and EBSCO contracts and budgets and provides Montana library staff with learning resources and support for these projects.

Services

Description

\$1,900 in FY14 LSTA for SirsiDynix integration of new libraries' records into integrated library system This funding covered costs related to initiating the new libraries' software licenses, creating new profiles and policies, loading new library data, and project management, data map services to set up and process bibliographic (item record) and patron record data from the libraries' legacy systems for data conversion and delivery to SirsiDynix for loading into the MSC SirsiDynix system.

MATCH: \$329,182 in Montana Shared Catalog membership funds for SirsiDynix and staff (two full time MSC staff positions and 2/3 MSC Systems Technician position salary and benefits) The Technical Services and Support position provides technical services (cataloging) support, monitors and maintains the integrity of the catalog's bibliographic (item record) database for completeness, accuracy, and standards compliance, provides technical assistance and support for member libraries, and creates, maintains, and presents training materials with an emphasis on cataloging procedures and guidelines. The Training and Technical Support position manages the MSC training program, including preparation, maintenance, and presentation of training materials, provides technical assistance and support for member libraries, and assists the MSC Director with administrative, public relations, and technical tasks.

\$87,203.20 in FY14 LSTA for State Library contribution toward OCLC Group Services contract including unlimited cataloging and interlibrary loan for subscribing libraries, and statewide EZproxy authentication license for all libraries

MATCH: \$120,640 in State Resource Sharing funds for OCLC Group Services contract to reduce costs to libraries

MATCH: \$289,164 in OCLC Group Services annual fees from enrolled libraries

\$16,250 in FY14 LSTA for State Library contribution toward EBSCO Discovery Service contract

MATCH: \$120,471 in State funds for the statewide EBSCO databases contract

Other Operational Expenses

Description

\$230.60 in FY14 LSTA for MSC Director office telephone

\$797.21 in FY14 LSTA for 2 MSC staff office telephones

Intents

Improve users' ability to discover information.

- Library Infrastructure & Capacity

Project Activities

Activity Details

Title: OCLC Group Services Interlibrary Loan

Abstract:

Interlibrary loan services (ILL) allow libraries to share collections with one another, which saves money by reducing redundant purchasing of commonly requested materials. Montana libraries that subscribe to OCLC Group Services have access to an online application called WorldShare Interlibrary Loan, which makes the process of borrowing or lending an item faster and more efficient, resulting in timely delivery of requested items to library patrons.

Using WorldShare ILL, library staff can set policies to automatically search for requested items from the closest lending libraries that meet their criteria. This reduces the level of repetitive work involved in processing a large number of requests, freeing up staff time to attend to other needs.

Activity Details

Title: OCLC Group Services Cataloging

Abstract:

Librarians use OCLC cataloging tools to catalog their libraries' items so that patrons can search and find what they need in the local library catalog or online at Worldcat.org, a catalog of items from libraries around the world.

OCLC cataloging tools help librarians create original item records, or add their local holdings (local copies of an item) to existing records, that are of consistent quality and adhere to rigorous cataloging standards. These standards help keep the WorldCat database of over two billion catalog records organized so that library patrons can easily find whatever subjects or particular items they are looking for.

WorldCat can be configured to work in tandem with OCLC interlibrary loan tools, providing a seamless online experience for library patrons to discover and request an item from their local libraries.

Activity Details

Title: Statewide Discovery System

Abstract:

EBSCO Discovery Service has records indexed for thousands of resources. Montana's EBSCO databases, the Montana Memory Project, the Montana Shared Catalog, the Montana Geographic Information System (GIS) Data List, WorldCat.org, MontanaLibrary2Go, HeritageQuest, and other public library catalogs (Butte-Silver Bow Public Library and Lewis and Clark Library) were all available as resources for library patrons to search in Discover It. Additionally, libraries could use records already in EBSCO's index to link to their own individual subscriptions to online resources available locally.

Montana library staff had the option to customize this all-in-one search for their libraries in order to narrow the scope of the search to yield results that would be more relevant to the needs and comprehension levels of their user groups.

Activity Details

Title: Training for Montana Library Staff

Abstract:

OCLC training activities during this reporting period focused on the Group Services libraries' transition from the WorldCat Resource Sharing interface to the new WorldShare Interlibrary Loan interface and from the FirstSearch interface to the WorldCat Discovery Service interface.

MSC training activities during this reporting period focused on use of the library catalog software and on copy cataloging.

EBSCO training activities during this reporting period focused on customization options for EBSCO Discovery Service such as limiting the search to specific databases; running statistical reports; transitioning from an old to a new database interface for student researchers; and providing in-depth orientation sessions for numerous subject-specific databases freely available to all Montanans through the EBSCO database contract. Audiences for the EBSCO sessions ranged from public and school library staff and educators to state agency librarians who serve state employees.

Activity Details

Title: Technical Support for Library Staff

Abstract:

The Statewide Projects Librarian served as the contract and training coordinator for OCLC Group Services libraries and assisted with basic technical support questions. The Statewide Projects Librarian also provided support in customizing EBSCO database interfaces and EBSCO Discovery Service search options.

During the reporting period there were five full-time staff members to support the MSC: 2.34 paid with LSTA funds and 2.66 paid from MSC membership fees. MSC staff was responsible for web development, installing and maintaining hardware and software, providing administrative and technical support, providing orientation training for new libraries, and providing ongoing training for the consortium.

Project Outcomes

List any important findings or outcomes from your project:

LSTA contributions from the State Library helped maintain reasonable costs to libraries for the OCLC Group Services. Access to OCLC Montana Group Services enabled enrolled libraries to catalog items and make their library collections discoverable online via the WorldCat.org web portal and database, discover items in other library collections worldwide, and make or fulfill lending requests through the WorldShare Interlibrary Loan. All members of the MSC are required to enroll in OCLC Group Services. These services help fulfill the MSC member libraries' mission "to improve their own and other member libraries' ability to deliver quality materials and services to their patrons." Additionally, libraries outside of the MSC enrolling in Group Services benefit from the cost savings for these services and share resources with MSC, other non-MSC, and out-of-state libraries. Montana libraries' OCLC cataloging activity increased by 12% during this reporting period, from 82,120 in the FY13 reporting period to 92,056 in the FY14 reporting period. Interlibrary loan transactions through OCLC decreased by 3% during this reporting period. However, ILL requests made by patrons in MSC libraries that share user privileges continued to increase because of the simpler and more efficient "place hold" capability within the Shared Catalog. The Montana Shared Catalog consortium's extensive work to streamline and simplify its configuration and circulation policies during this reporting period has resulted in the MSC staff being able to work more efficiently to meet the needs of MSC member libraries; has improved resource sharing opportunities; and has better situated the consortium to adapt to new technologies.

This reorganization effort concludes in 2016. Montana patrons initiated 1,183,753 EBSCO database sessions during the reporting period, and retrieved 909,826 full text articles. Although the number of sessions as increased since the last reporting period, this represents a 5% decrease in full text retrievals. Montana patrons initiated 76,508 sessions in EBSCO Discovery Service and retrieved 63,491 full text articles during the reporting period. This represents a 67% increase in full text retrievals over the previous reporting period.

Please briefly describe importance of findings.

Decreased interlibrary loan activity may have been influenced by a couple of factors: one being a slight increase in lending and borrowing activity among Montana Shared Catalog sharing group libraries (where a hold can be placed directly for an item at another library through the library catalog, rather than a formal interlibrary loan request being placed through OCLC), and another being the increased use of electronic resources such as e-books.

What methods did you use to determine your findings? Check all that apply.

Review of Administrative Data

Do you anticipate continuing this project after the current reporting period ends? Yes

Do you anticipate any change in level of effort? Yes

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. The Task Force recommended that the State Library increase or at least maintain support for resource sharing programs such as OCLC and the Montana Shared Catalog, while periodical databases and the discovery service were perceived as less critical to helping public libraries in Montana meet their communities' primary needs. Given these recommendations, the State Library would anticipate further instruction from the State Library Commission that will likely change the level of funding and staff support for some or all of these activities in the next reporting period.

Montana Courier Alliance Project

Abstract: The purpose of the Montana Courier Alliance is to support affordable and efficient resource sharing and transfer of physical library materials among participating libraries across the state of Montana.

The courier service currently serves 55 library locations through 19 drop sites that have signed service agreements with Critelli Couriers. The Montana State Library holds the contract with Critelli.

A Courier Advisory Board comprised of eight members from participating academic and public libraries is consulted for input on budget and cost share recommendations, as well as policy and procedures.

State Goal: Access to Quality Content

Director Name: Cara Orban

Budgets

Services

Description

\$7,839.39 in FY14 LSTA paid to Critelli Couriers

MATCH: \$41,699 in monthly stop rate fees from participating libraries Participating drop site libraries **contributed \$23 per stop for courier service.**

Intents

Improve users' ability to obtain information resources.

- Library Infrastructure & Capacity

Project Activities

Activity Details

Title: Courier Delivery to Libraries

Abstract:

Critelli Couriers picks up and delivers crates of library materials to participating libraries at a rate of two to five days a week per stop.

These delivery statistics were collected from participating courier drop site libraries from January 2015 through September 2015, as part of the State contract for courier service that commenced in January

2015.

Participating libraries received a \$2 per stop discount through the State Library, funded with FY14 LSTA monies.

Project Outcomes

List any important findings or outcomes from your project:

Access to a regular courier service reduces the cost of resource sharing of physical materials between libraries. By sending materials in bulk via courier, rather than individually packaging and sending items through the mail, library staff save time and library budgets benefit from an average cost savings of \$7 per item (factoring in staff time, postage, and the cost of packaging materials). High volume borrowers and lenders such as the libraries in the Montana Shared Catalog (MSC) Partners resource sharing group reap the greatest value from this service by shipping in bulk from one hub to the next. MSC sharing groups such as Partners comprised 66% of courier stops and 91% of the volume sent via courier during this reporting period.

Please briefly describe importance of findings.

The proven value of the courier network to sharing group libraries supports continued efforts to strengthen the network and keep costs affordable for any Montana libraries that are interested in sharing physical materials for the benefit of their patrons. For libraries, "affordable" means at least being consistently more cost effective than sending via mail. Statistics indicate that volume and cost per item factor into affordability, and that a flat rate does not actually represent a discount for some libraries that do not send and receive a volume of materials on the level of the MSC sharing group libraries. And so, two objectives for the upcoming reporting period will be to sustain and increase access to courier service for existing MSC sharing group libraries, but also to review discount and delivery options for libraries that are geographically remote or that cannot otherwise support the level of materials sharing necessary to realize a discount in comparison to traditional interlibrary shipping via mail. By thinking broadly about ways to support the transfer of physical materials, the State Library hopes to expand opportunities for libraries to join resource sharing groups, which would increase the amount of materials available to library patrons and save collection development funds that would have been spent on duplicate materials.

What methods did you use to determine your findings? Check all that apply.

Review of Administrative Data

Do you anticipate continuing this project after the current reporting period ends? Yes

Do you anticipate any change in level of effort? Yes

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. The Task Force recognized library infrastructure that is accessible and affordable and that enables end users to access resources and services easily as an essential need

for Montana libraries. Given the courier's role in making materials sharing possible between sharing group libraries in the Montana Shared Catalog, the State Library expects that this project will remain a high priority for Montana libraries, and that the overall level of support may increase in the next reporting period. This may include a change in the level of LSTA or match funds.

Early Literacy Project

Abstract:

The purpose of the Ready 2 Read early literacy program at the Montana State Library is to help Montana parents and caregivers understand the value of sharing language and literacy with their children. The program has provided collections of high-quality children's books to libraries, early childhood training to librarians, and extensive information and training to parents and caregivers on the importance of sharing books with children from birth forward.

During this reporting period, the Early Literacy Coordinator focused the use of LSTA funds on planning for an innovative project that sent concise tips and activity ideas to parents and caregivers of four year olds with the objective of helping prepare all Montana children to enter kindergarten at age five.

The Early Literacy Coordinator also prepared for and organized the 2015 Ready 2 Read Rendezvous training event for public library staff during this reporting period, although the event itself was funded with FY15 LSTA and will be addressed in the report for that award period.

State Goal: Consultation and Leadership

Director Name: Sara Groves

Budgets

Salaries/Wages/Benefits

Description

\$34,451.71 for one State Library Early Literacy Coordinator

Travel

Description

\$735.24 in FY14 LSTA for Early Literacy Coordinator travel

\$221 in FY14 LSTA for Early Literacy Coordinator conference registration

Services

Description

\$2,150 in FY14 LSTA for early literacy training by Collaborative Summer Library Program Montana representative

\$100 in FY14 LSTA for Twilio.com texting service

\$1,500 in FY14 LSTA for text message project

\$900 in FY14 LSTA for graphic design for text message project

Other Operational Expenses

Description

\$664.53 for Early Literacy Coordinator telephone and office supplies

MATCH: \$127 from the State

Intents

Improve users' ability to apply information that furthers their parenting and family skills.

- Early Literacy
- Continuing Education and Staff Development

Project Activities

Activity Details

Title: Text message project

Abstract:

Based on a Stanford University study, the Montana Ready 2 Read texting program delivers three weekly research-based text messages for a period of eight months at no charge to anyone who signed up. In late 2014, Stanford University published study results from an intervention program that involved sending texts to parents and caregivers of preschoolers enrolled in the San Francisco School District's public preschool program. The results indicated that READY4K positively affected the extent to which parents engaged in home literacy activities with their children by .22 - .34 standard deviations, as well as parental involvement at school by .13 - .19 standard deviations. Increases in parental activity at home and school translated into student learning gains in some areas of early literacy, ranging from approximately .21 - .34 standard deviations. The widespread use, low cost, and ease of scalability of text messaging made texting an attractive approach to supporting parenting practices in Montana.

The State Library contracted with an early learning specialist to write a series of text messages based on the findings from the Stanford study. The early learning specialist drew on research on literacy development, parenting practices, and behavior change strategies. The program was linked to the Montana Early Learning Standards and was structured as a spiral curriculum, starting out simple and becoming progressively more advanced over time, with topics reintroduced throughout the year for reinforcement. For example, the first week of the program focused on parent-child conversations, while the last few weeks concentrated on developing high-quality parent-child book routines.

Project Outcomes

List any important findings or outcomes from your project:

The biggest challenge for the texting project has been promoting the project statewide. In Montana, there is no standard sign-up form for preschool or Head Start programs. For evaluation purposes, there is also no standard set for evaluating kindergarten readiness in Montana. The Arthur Blank Family Foundation has approached the State Library and has offered its assistance in evaluating the project.

What methods did you use to determine your findings? Check all that apply.

Review of Administrative Data

Do you anticipate any change in level of effort? Yes

Please briefly describe any changes in the level of effort. Include information about whether you intend to use LSTA or Match funds.

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. Based on the survey responses from Montana library staff and the recommendations of the Task Force, the State Library may consider redefining and possibly broadening its support for literacy initiatives to include adult literacy, digital literacy, and financial literacy. Early literacy support remains a high priority for Montana libraries. These decisions will be informed by further recommendations and directives from the State Library Network Advisory Council and the State Library Commission in the next reporting period.

Summer Reading Program Project

Abstract:

The State Library purchased summer reading manuals from the Collaborative Summer Library Program (CSLP) for all Montana libraries and branches. Additionally, the State Library sent one public library staff member to the CSLP annual meeting to represent Montana. That individual offered two continuing education training sessions related to summer reading for Montana libraries. One training was an in-person training at the annual Montana Library Association conference; the second training was a webinar. Additionally, this individual also communicated throughout the year with Montana libraries all information related to summer reading, such as ordering deadlines, information on the teen video challenge, and more.

State Goal: Consultation and Leadership

Director Name: Sara Groves

Budgets

Supplies/Materials

Description

\$1,375 in FY14 LSTA for one summer reading program manual for each of the 110 Montana public library locations at \$12.50 apiece

Intents

Improve users' formal education.

- Reading Program (Summer Reading)

Project Activities

Title: Summer Reading Program Training

Abstract:

The Early Literacy Coordinator and the Montana representative for the Collaborative Summer Library Program (CSLP) presented one in-person and one virtual workshop for public library staff across Montana to help them prepare their summer reading programs.

At the in-person workshop at the annual Montana Library Association conference, the CSLP Montana representative walked session attendees through the manual, discussed programming ideas for different age groups, and shared information about opportunities to bring in speakers and presenters for public programs.

The webinar presented the opportunity for Montana library staff to hear from their colleagues about their ideas for summer reading programming and implementation details for recreating successful programs.

Project Outcomes

List any important findings or outcomes from your project:

In 2015, the State Library conducted its first-ever assessment of summer reading programs in the state. 74 Montana libraries responded to the online survey. Findings indicated that summer reading is an important library service in communities statewide, with 97% of survey respondents saying that they offer a summer reading program. Survey respondents were asked what type of summer reading program they offered, and were encouraged to check all that apply since many libraries offer multiple versions of a summer reading program targeted at different audiences. Results indicated that 74% of respondents offer an early literacy program; 98% offer a children's summer reading program; 63% offer a teen summer reading program; and 37% offer a summer reading program specifically for adults. Approximately 91% of survey respondents used the Collaborative Summer Library Program manual that is provided to them from the State Library. The number of participants in the respondents' summer reading programs ranged from 25 to thousands, with the bulk of participants identified as children.

Libraries identified staffing and funding as two of their biggest challenges for their summer reading programs and great participation from their communities as one of their big successes. Survey respondents also identified some ways for the State Library to assist them with their summer reading program, such as assisting in statewide promotion of the program, and coordinating statewide contracts for performers to assist libraries in planning programming. 29,020 Montana residents were reported to have participated in the 2015 summer reading program.

To highlight the importance of summer reading and its value to education in our state, Lt. Governor Angela McLean also visited three Montana public libraries during their summer reading events. Lt. Governor McLean traveled to Fort Benton, Butte, and Havre to read to children, engage with parents and talk about the importance of developing daily reading habits, and share information with public officials about the value of libraries and reading.

What methods did you use to determine your findings? Check all that apply.

Survey

Review of Administrative Data

Interview/Focus Group

Participant Observation

Other

Do you anticipate continuing this project after the current reporting period ends? Yes

Please briefly describe any changes in the level of effort. Include information about whether you intend to use LSTA or Match funds.

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. At the end of this reporting period, the State Library had not yet determined whether it would be necessary to order hard copies of the Collaborative Summer Library Program manuals, or whether it would be sufficient to provide digital access to the manuals in the future. As noted, summer reading remains an important part of the public library calendar. Decisions on the scope and level of effort for this program will be informed by further recommendations and directives from the State Library Network Advisory Council and the State Library Commission in the next reporting period.

Continuing Education for Library Staff Project

Abstract:

One of the six goals of the State Library Commission is to support the professional development of Montana's public library staff and trustees. In Montana, the needs of small public libraries and the challenges of winter weather and great distance that make travel to training venues difficult are important considerations in developing training. The State Library complements programming provided through the Montana Library Association to provide balanced and essential ongoing professional development through in-person and virtual means so that Montana library staff can effectively serve their communities.

The Certification (CE) Program is mandatory for public library directors and voluntary for library staff and public library trustees. The CE Program serves an important function in Montana, where there is no higher education degree program for public libraries, and the available workforce for the small public libraries in the state is often untrained in library science. The CE Program and the Public Library Standards ensure that library boards will support continuing education by providing funding and time for training.

A component of the CE Program, the Summer Leadership Institute, is intended to empower Montana's public library leaders and emerging leaders to develop and expand skills and tools for personal and professional leadership; recognize themselves as leaders at their library and in their community; become change agents in their libraries and communities; form, articulate, and communicate a vision that inspires others to act; pursue continuous professional development; in particular, future leadership learning; and build and sustain collaborative, productive networks with their peers.

Scholarships for Montana library staff provided opportunities for librarians to engage with the greater library community while participating in professional development and learning opportunities. Additionally, other library staff in Montana would benefit from refreshing continuing education opportunities provided by attendees after their conference experiences, where they could share ideas and helpful resources gathered at conference.

State Goal: Consultation and Leadership

Director Name: Sarah McHugh

Additional Materials

☐ <http://libraries.msl.mt.gov/Home/learning>

Budgets

Salaries/Wages/Benefits

Description

\$59,957.67 for Continuing Education (CE) Coordinator position salary and benefits: This full time position coordinates training events for a statewide audience of Montana library staff and facilitates performance improvement of the Montana State Library staff who conduct those training activities. The position is held by an instructional designer who holds a MS Ed degree in Instructional Systems Technology. The position organizes the State Library Learning Portal, provides support to training staff by assisting with the design and evaluation of training activities, maintains ongoing analysis of training needs of librarians in Montana, and develops support scaffolds (coordinated use of online and software resources such as Camtasia, SlideShare, Vimeo, and GoToTraining) so that MSL training is effective and efficient. The CE Coordinator hosts monthly meetings of training staff to share information and to provide training on how to use shared tools; plans training events such as the Annual Montana State Library Fall Workshops or trustee training events held at different venues across Montana; provides information for the Montana Library Association planning committees for their sponsored training activities; and oversees the Montana State Library Certification Program.

Travel

Description

\$5,220.33 for CE Coordinator travel

\$498 for CE Coordinator conference registration

\$3,784.34 for conference travel and registration for three Montana public and academic library staff to attend Association for Rural & Small Libraries (ARSL) Annual Conference in Tacoma, Washington, September 2014

\$8,000 for conference travel and registration for four Montana public library staff to attend American Library Association (ALA) Annual Conference in San Francisco, California, June 2015

\$2,991 for conference travel and registration for two Network Advisory Council representatives to attend the Research in Public Libraries (RIPL) Conference in Colorado Springs, Colorado, July 2015

Supplies/Materials

Description

\$916.22 in FY14 LSTA for State Library tablet training lab equipment Two projectors and two sets of speakers were purchased to augment two State Library tablet training labs which were purchased with FY13 LSTA. This equipment further enables MSL training staff to provide successful training to librarians around the state using these labs.

\$22,500 in FY14 LSTA for 18 laptops and mice for State Library laptop training lab MATCH: Six laptops and mice purchased with donation for State Library laptop training lab The State Library provides laptop training labs for use by Library staff, staff or representatives of Library partners, including but not limited to the Montana Library Association and the Montana Association of GIS Professionals, and staff of other

Montana libraries who offer training in locations without access to sufficient computing resources. When not being used by the State Library, partners, or other Montana libraries, the labs are available for use by staff of Montana state agencies. The labs are heavily used by all groups. Two of the three existing labs were aging and needed to be replaced. Through the use of FY14 LSTA and a private donation, the State Library replaced both of the older labs and reassigned one of the replaced labs to meet the training needs of the Montana Shared Catalog membership. Replacing two of the older labs enabled the State Library to continue providing training labs that offer the latest technology.

\$2,459.18 in FY14 LSTA for one headset each for 82 public libraries, to participate more fully in online meetings and learning opportunities

\$2,643 in FY14 LSTA for Camtasia software to develop online tutorials for library staff

\$19.88 in FY14 LSTA for State Library conference supplies

Services

Description

\$18,715.15 in FY14 LSTA for Summer Institute lodging, facilitator's fee, speakers' fees, meals, and travel reimbursements for 22 public and school library staff

\$4,991.07 in FY14 LSTA for contractor fees for Trustee Training sessions

Other Operational Expenses

Description

\$254.19 in FY14 LSTA for CE Coordinator telephone

Intents

Improve the library workforce.

- Continuing Education and Staff Development

Project Activities

Activity Details

Title: Montana Public Library Staff Conference Attendance

Abstract:

The Montana State Library used FY14 LSTA to sponsor scholarships for public librarians and members of the Montana State Library's Network Advisory Committee to attend national conferences. Afterward, the recipients shared conference findings with their peers via recorded webinar sessions facilitated by the State Library.

Four Montana library staff attended the American Library Association Annual Conference in San Francisco, California, in 2015.

Three library staff attended the Association for Rural & Small Libraries Annual Conference in Tacoma, Washington, in 2014.

Two library staff representing the Montana State Library Network Advisory Council attended the Research in Public Libraries Conference in Colorado Springs, Colorado, in 2015.

Activity Details

Title: Summer Institute

Abstract:

The State Library hired Cheryl Gould to conduct a four day intensive institute for 20 emerging library leaders in July 2015 to provide specific strategies for effective leadership in their libraries and in their communities. The Summer Institute required that each participant participate in an ongoing cohort and complete a rigorous project that implements their new leadership skills. The projects ranged from managing library remodels, to chairing a professional development conference for the Montana Library Association, to implementing collaborative new activities at their libraries.

Activity Details

Title: Trustee Training

Abstract:

The Montana State Library provided onsite and online training directed at public library boards on the topic of planning for succession at several venues for the purpose of preparing library trustees for replacing key positions at their libraries.

Public library boards need to be prepared for changes in executive and managerial leadership because Montana's librarians are entering retirement age at a rate of over 40% of the total workforce. This training series addressed the immediate needs of succession preparedness and responding to an emergency succession for library board members for the purpose of easing transitions and reducing or eliminating disruption of essential library services.

Activity Details

Title: Creation of Online Learning Resources for Montana Library Staff

Abstract:

Montana State Library LSTA-funded staff conducted 81 online training classes directed primarily toward public library staff and trustees to support continuing education and provide a no-cost training option for public libraries so that they may provide innovative and world-class services to library patrons.

These classes were recorded and added to Vimeo, an online video hosting site, so that library staff could review the information on their own time and earn CE credit toward certification. The CE Coordinator added these videos to the Montana State Library Vimeo channel during this reporting period, contributed by various State Library staff in support of all services and programs available through the Library Development division of the State Library.

Intent: Improve the library workforce.

Activity Details

Title: Montana Certification Program

Abstract:

The Montana Library Certification Program was established to promote continuing education and to recognize librarians and trustees who continue to expand their knowledge and skills to provide improved services for patrons and communities. Public library directors must earn 60 continuing education credits in a four-year period in order to gain certification so that their libraries remain eligible to receive state aid. Certification is voluntary for all other librarians and trustees. 63 library staff completed certification during this reporting period.

Project Outcomes

List any important findings or outcomes from your project:

For training activities at the Montana State Library, trainers use a combination of data gathering procedures and tools with evaluation surveys, observation, and a portfolio-based assessment of the participant for training events that involve a greater level of investment, such as scholarships to attend conferences or the four-day leadership training at the Summer Library Leadership Institute. Portfolio assessments involve asking the participants to provide proof of their performance improvement by reporting on a project or presenting staff development training to their peers. The application procedure for Montana State Library Certification was moved to an exclusively online process for all library staff and trustees in order to improve data collection, reduce errors in processing, ease the process for applicants, and create a procedure that is sustainable as requests for certificates continue to increase while staff-time available for processing is decreasing. The Continuing Education Coordinator adjusted and expanded the Montana State Library Learning Portal to provide easier access to training materials

and better navigation so that all library staff could more quickly and easily find relevant on-demand training.

78.5 % of respondents enrolled in a six part series exploring online resources that are licensed statewide for libraries and their patrons noted that they liked that they did not have to travel to get training. 57% indicated that they felt connected to the class. Every respondent cited at least two reasons why they liked the online class. 89% of trustee training attendees reported that they learned something that was directly applicable to their library, and 75% noted that they were now aware of specific gaps that exist at their libraries that need to be addressed. 25% found that the procedures they have in place put them in good shape to manage a transition in executive staff, and a few mentioned that the affirmation of their preparedness was reassuring.

The Continuing Education Coordinator conducted an intensive training for all State Library trainers on the topic of evaluation and its place in the instructional design process, which led to the development of a pilot evaluation form that could be easily implemented in all training events.

Scholarship attendees have commented that without the scholarship opportunities provided through the State Library, they would never have been able to attend a national conference. Post-conference sessions also increased knowledge sharing and collegiality within the Montana library community. An hour long webinar session, "Great Ideas from the ARSL Conference," was presented by 2014 attendees and uploaded to the MSL Vimeo channel (<http://vimeo.com/112195336>). At reporting time, this video had been replayed 22 times. The American Library Association 2015 Annual Conference Montana peer sharing webinar (<https://vimeo.com/139648042>) had been replayed 11 times.

Please briefly describe importance of findings.

Evaluation data provides valuable needs analysis for planning future training. In the case of the trustee training, State Library staff learned that the topics of greatest interest are to provide training in how to manage expectations regarding salary and benefits for library staff, learning more about recent updates in personnel law, performance evaluation, providing a checklist for boards on hiring a new director, and assistance with how to create standard operating procedures. The CE Coordinator worked with peers from other states to create and publish the checklist mentioned in the evaluation - a direct impact of the evaluation data. Other topics of interest will be considered in upcoming training opportunities for library trustees. Topics that fell to the bottom of the list, like writing job descriptions or how to conduct a desk audit, will receive a lower priority for new training. The pilot evaluation form is being tested and will be adjusted throughout the next reporting period as needed so that all training staff are prepared to conduct substantive evaluation and the data collected can be shared across the agency to better inform the future training activities at the State Library.

What methods did you use to determine your findings? Check all that apply.

Survey

Review of Administrative Data

Participant Observation

Other

Do you anticipate continuing this project after the current reporting period ends? Yes

Do you anticipate any change in level of effort? Yes

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian, consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. The State Library's Continuing Education services were included in this evaluation effort. Based on the Task Force recommendations, the State Library expects to continue training with greater emphasis on developing more self-paced, on-demand learning resources for content that meets an ongoing identified need. An example is new library director training. Training that introduces new directors to the programs and services of the State Library, information on public library standards in Montana, and other information of perennial interest will be organized into self-paced learning modules online.

Downloadable E-Content Project

Abstract:

The purpose of the downloadable e-content project is to ensure that all Montana residents have access to the digital content that they want and need through their local libraries.

MontanaLibrary2Go offers a collection of contemporary, classic, and bestseller downloadable and streaming audiobooks and e-books (books in electronic, or digital, format) to patrons of participating Montana public, tribal, and academic libraries. The Montana State Library contracts with a distributor called OverDrive to host the collection and to deliver content to patrons who register for a free account through their libraries. Patrons are allowed to check out up to five titles at once, and can download those titles to nearly any mobile device, e-reader, or personal computer; or, they can opt to stream audiobooks or read e-books through their preferred browsers. OverDrive hosts content from the top five international book publishers, as well as from a wide variety of smaller publishers and presses.

Downloadable and streaming library books and audiobooks are a valuable service in a large and mostly rural state such as Montana, where citizens often live many miles from the nearest public library. Online services such as MontanaLibrary2Go provide Montanans with the convenience of an "anytime, anywhere" collection, while maintaining the quality content and high level of support of traditional library services.

93 public and academic libraries participated in this project, with four new libraries added during this reporting period. Over 1,000 patrons continued to sign up for the service each month during this reporting period.

FY14 LSTA was also used to fund the annual maintenance fee for the Adobe Content Server (ACS) license that is part of the structure for the MontanaLibrary2Go Local project. ACS is software that allows the State Library to set digital rights and distribution limits (such as limits on checkout or printing privileges) to manage a pilot collection of e-books, purchased or acquired by the MontanaLibrary2Go Selection Committee from local authors and Montana publishers, which complements the existing consortium collection of licensed (temporarily leased) e-content. With the ACS platform, the State Library is able to facilitate for Montana libraries the distribution of locally created content, collected by or submitted to the library by local authors and content creators.

State Goal: Access to Quality Content

Director Name: Cara Orban

Additional Materials

🔗 <http://books.msl.mt.gov>

🔗 http://libraries.msl.mt.gov/Home/statewide_projects/montanalibrary2go



http://docs.msl.mt.gov/slrd/statewide_projects/montanalibrary2go/forparticipatinglibraries/selectionbudgetrotationFY15.pdf

 <http://montanalibrary2go.org>

Budgets

Salaries/Wages/Benefits

Description

MATCH: \$19,249 for Statewide Projects Librarian salary and benefits

The Statewide Projects Librarian manages contracts and budgets and provides Montana library staff with learning resources and support for LSTA-supported statewide projects, including the downloadable e-content project known as MontanaLibrary2Go. This position also coordinates the efforts of the volunteer committees for the consortium and serves as the State Library ex officio on those committees.

MATCH: \$6,940 for volunteer committee hours MontanaLibrary2Go Executive Committee (25 meeting hours total x \$20 = \$500)

The MontanaLibrary2Go Executive Committee is responsible for developing and reviewing collection development policy and procedures; developing annual budget and cost-share formula recommendations for approval by the membership; and making other recommendations to the membership as needed. MontanaLibrary2Go Selection Committee (322 meeting and work hours total x \$20 = \$6,440) All content is carefully selected by the nine person volunteer Selection Committee, who devote an average of 25 hours per month in this task, to the benefit of all member libraries and their patrons. The Selection Committee's work is described in detail in the MontanaLibrary2Go Acquisition activity report.

Supplies/Materials

Description

\$2,164.75 in FY14 LSTA for 45 additional e-books and digital audiobooks for the MontanaLibrary2Go collection

MATCH: \$202,713 in annual membership dues and donations from MontanaLibrary2Go member libraries and friends or foundation groups All membership dues and donations were spent on e-books and digital audiobooks for the MontanaLibrary2Go collection, which is shared among all member libraries, with four percent of collected dues spent on purchasing standardized item records for the consortium so that library patrons can discover items from this collection in their local library catalogs.

Services

Description

\$12,000 in FY14 LSTA for OverDrive hosting fee This includes the collection website hosting and maintenance and all circulation functions, such as checking out and returning digital materials, placing holds, delivering item records for the library catalog, and technical support for all member library staff.

\$6,000 in FY14 LSTA for OverDrive integration fees to add four new libraries to the MontanaLibrary2Go consortium at \$1,500 each Integration fees cover the cost of adding library patron records to OverDrive's database so that patrons can log in and check out MontanaLibrary2Go content.

\$1,502.24 in FY14 LSTA for Adobe Content Server annual maintenance This includes the software license for uploading content and administering circulation functions and digital rights management.

Intents

Improve users' ability to obtain information resources.

- Collection Development & Management

Project Activities

Activity Details

Title: MontanaLibrary2Go Acquisition

Abstract:

The MontanaLibrary2Go Selection Committee shares the responsibility of adding new content each month to the shared e-books and digital audiobooks collection, which is a commitment that requires an average of 25 hours per month. The Selection Committee follows the collection development policy and procedures as approved by the Executive Committee (attached to this report). Selections must represent broad areas of interest to patrons at all member libraries in the consortium, including a variety of fiction genres as well as current nonfiction titles.

The Selection Committee's collection development process entails thoroughly reviewing circulation statistics, book reviews, bestseller lists, holds lists, and patron request lists. After the selector of the month has completed her work, the rest of the committee has an opportunity to review and make any final suggestions before the order is submitted. During this reporting period, the Selection Committee Coordinator has added to her responsibilities the monthly task of removing approximately 100 expired licensed (limited lease) items from the collection each month.

28,410 units were available to registered patrons at the end of this reporting period, of which over 22,000 were unique titles.

Intent: Improve users' ability to obtain information resources.

Activity Details

Title: MontanaLibrary2Go Circulation

Abstract:

MontanaLibrary2Go member libraries offered their patrons the opportunity to sign up for a free OverDrive account. Registered patrons can then browse or search the collection at <http://montanalibrary2go.org> and select from a variety of titles to read, listen to, or download in multiple formats: epub, pdf, and Kindle for e-books, and mp3 for audiobooks (the proprietary wma format was discontinued during this reporting period). Patrons also had the option of streaming audio or reading a book in their browsers. Patrons could access these titles through a mobile app, available to them at no cost, or through software downloaded on to their personal computers.

During the reporting period, registered patrons at MontanaLibrary2Go libraries checked out 749,996 items, of which 303,344 were audiobooks and 446,652 were e-books. The MontanaLibrary2Go Local pilot currently has 21 books on the public website available for checkout.

Activity Details

Title: Addition of New Libraries to MontanaLibrary2Go

Abstract:

Four public libraries joined MontanaLibrary2Go during this reporting period. The State Library used \$1,500 apiece in FY14 LSTA to cover one-time vendor fees to integrate the libraries' patron card numbers into the OverDrive authentication system so that those patrons could sign up for a free account and check out e-books and digital audiobooks.

Project Outcomes**List any important findings or outcomes from your project:**

During the reporting period, the number of e-books and digital audiobooks available to all MontanaLibrary2Go registered users increased by 16% from 24,521 in the FY13 LSTA reporting period to 28,410 total copies in the FY14 LSTA reporting period. Circulation (number of checkouts) increased by 23%, from 607,637 in the FY13 LSTA reporting period to 749,996 in the FY14 LSTA reporting period. During the reporting period, the total number of library patrons registered for MontanaLibrary2Go user accounts increased by 24%, from 51,057 in the FY13 LSTA reporting period to 63,365 in the FY14 LSTA reporting period.

Please briefly describe importance of findings.

As a result of adding four new libraries to the MontanaLibrary2Go consortium, library patrons in four new service areas, including two entire counties each served by a single library, now have free access to digital books and audiobooks through their libraries for the first time. The four libraries that benefited from LSTA assistance during this reporting period in covering the library integration startup fees for joining MontanaLibrary2Go illustrate the critical importance of facilitating resource sharing and collaboration among Montana libraries. By joining the statewide consortium, where individual costs are carefully assigned to make sure that all libraries can afford to participate while still meeting financial benchmarks for growth, these libraries are providing their small and rural communities with

contemporary library services that they may not otherwise be able to afford on their own. A shared collection also means more equitable access to information statewide. Through MontanaLibrary2Go, a resident of Circle, Montana (population 617) has access to the same number and scope of digital library titles as a resident of Billings (population 109,059). Residents, particularly rural residents, who cannot physically visit the library now have the option to quickly and easily check out and read or listen to a wide variety of popular books from any location where internet service is available. Overall, the number of Montana residents who make use of this statewide service continued to increase across all library locations, indicating that collection development practices and budgets should continue to incorporate plans for increasing access to digital content.

What methods did you use to determine your findings? Check all that apply.

Review of Administrative Data

Do you anticipate continuing this project after the current reporting period ends? Yes

Do you anticipate any change in level of effort? Yes

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. Based on the Task Force recommendations, which included support for access to additional e-content and consortial resource sharing, the State Library expects that the scope and the level of support for e-content projects and services will continue to evolve and possibly expand in the next reporting period, which may require a change in the level of support in LSTA funding or in funding from the membership.

Montana Talking Book Library Project

Abstract:

The Montana Talking Book Library (MTBL) is a regional library of the National Library Service (NLS), Library of Congress, as well as a state program of the Montana State Library. MTBL provides services to eligible individual and institutional facility patrons (end users) in Montana, and bordering states, who are professionally certified to have blindness, low vision, a physical or reading disability that present a barrier to reading standard print materials. MTBL provides free materials, including in-house and downloadable local and NLS provided audio, large print and Braille books, magazines, newsletters, and equipment to play audio materials. Patrons served vary in their ability to comprehend and utilize skills with technology resources from no skills to extremely high skills. Professionally trained MTBL employees offer direct one-on-one support to all patrons, customizing training to the patron's level of skills and abilities with technology resources. MTBL operates Monday through Friday from 8:00 a.m. to 5:00 p.m., except on state and federal holidays.

MTBL served 2,991 active patrons and institutional facilities during this reporting period. This number was comprised of 2,576 individual adult and 29 juvenile patrons and 386 institutional facilities. MTBL added 458 new patrons and new institutional facilities during this reporting period. Institutional facilities are defined as public library demonstration partners, hospitals(hospice, kidney dialysis, transitional and long term services), retirement businesses (independent, assistive, long term care and Alzheimer units), public, private and specialized schools for the blind and low vision, and other Montana community services serving individuals with blindness, low vision, physical and/or reading disabled.

State Goal: Services to Montanans with Visual, Physical, or Reading Disabilities

Director Name: Christie Briggs

Budgets

Salaries/Wages/Benefits

Description

174,263 in FY14 LSTA for salary and benefits for six full time MTBL positions

MATCH: \$125,134 from the State

MATCH: \$2,398 in donations

Travel

Description

\$636.28 in FY14 LSTA for conference travel and registration

In April 2015, the MTBL Reader Advisor and Keystone automated database (KLAS) software administrator attended the KLAS Users' Conference in Oklahoma City, Oklahoma.

Other Operational Expenses

Description

\$24,462.72 in FY14 LSTA for building and maintenance; network fees; printing services; and office supplies

Intents

Improve users' ability to obtain information resources.

- Other

Project Activities

Activity Details

Title: MTBL Readers Advisory and Support Services

Abstract:

Three Reader Advisors advise and assist library patrons through researching desired audio books and magazines. Staff also offer one-on-one support to patrons who download from the online BARD library service. MTBL offers interlibrary loan services between participating talking book libraries.

During this reporting period, MTBL staff and volunteers fielded over 13,538 phone and 5,415 e-mail patron requests for personal assistance with their library services. Of the 18,953 patron phone and email requests, 3,640 were reference requests on topics outside the scope of MTBL services, from general reference questions to requests for assistance in using commercial audiobook or print book services.

Reader Advisors also provided training and outreach to partner organizations and participated on the KLAS Database Development Advisory Committee, representing small Talking Book Libraries in the NLS network.

Activity Details

Title: MTBL Book Circulation

Abstract:

During this reporting period, MTBL checked out 147,892 items to its patrons. This number included 3,192 locally created Montana digital books, 128,352 NLS-provided digital books, 3,563 locally created Montana audio cassette books, 12,703 NLS-provided cassette books, and 82 Braille Twin Vision books, created in-house, for embossed tactile Braille book users.

Patrons also borrowed 1,050 digital titles via interlibrary loan from the NLS Multi-State Center West in Salt Lake City.

Activity Details

Title: MTBL Book Playing Device Lending Service

Abstract:

The National Library Service has designed two types of digital players for listening to NLS recorded digital books: a standard model and an advanced model. The standard model offers excellent sound quality, and each book is contained on a single digital cartridge – there is no need to change tapes or sides. The machine is powered by a rechargeable battery that holds a charge up to 29 hours before needing to be plugged in for less than an hour to be recharged. The buttons on the player have distinctive shapes in a soft rubber for tactile ease of use that allow the low-vision user to identify them by touch.

The advanced model is similar to the standard model but has five additional buttons which are designed to be useful when reading non-fiction books. The advanced buttons allow the user to skip ahead or back, place a bookmark, and access the book's table of contents or user guide. MTBL lends one digital player, either standard or advanced, to each of its patrons, at no cost to the patron. MTBL staff provide technical support and replacement for these players. All digital players have a side USB port to accommodate BARD users in listening to their BARD downloaded books contained on a thumb drive.

The Machine Lending Agent on staff at MTBL who manages all patron equipment oversaw the lending of 1,933 total digital players to patrons and demonstration sites, with 451 digital and 4 cassette players distributed to new patrons. Those patrons without a free loaned digital player utilized either a cassette player, or purchased one of the NLS approved third-party BARD digital download devices. Telecom pioneer volunteers cleaned 758 digital and 208 cassette players, recharged batteries, updated software, and repaired hardware. 218 cassette players were damaged beyond repair and were recycled back to NLS. MTBL received 120 new digital players from NLS.

Activity Details

Title: BARD and Digital Content Downloads

Abstract:

Braille and Audio Reading Download (BARD) is an online service operated by the National Library Service, in partnership with the Montana Talking Book Library, to give patrons faster access to digital talking books. NLS maintains the website and uploads titles. MTBL approves applications, provides technical support, and responds to reader inquiries. BARD offered more than 68,292 audiobooks and

12,417 issues of audio magazines, and is available 24 hours a day, seven days a week.

MTBL supported 304 active BARD patrons during this reporting period. BARD patrons directly downloaded a total of 667 Braille and 23,525 audio BARD books and magazines. MTBL staff downloaded an additional 1,060 books and magazines to be duplicated-on-demand for non-BARD patrons who reserved additional copies from the in-house collection.

167 subscribers made use of the electronic newspaper service to access five Montana daily newspapers through the users' phone, computer, or independently purchased, NLS-approved third party downloadable devices.

400 patrons subscribed to 528 magazines (78 Braille and 445 audio).

Magazines produced by other regional libraries were: [AARP Magazine](#), [Audubon Magazine](#), [National Geographic Traveler](#), [Saturday Evening Post](#), [Smithsonian](#), [Southern Living](#), and [Time Magazine](#). These went through MTBL's duplication on demand process and were then re-distributed to MTBL patrons.

Activity Details

Title: Recording Program

Abstract:

The Recording Program volunteers (12 three-partner teams consisting of a narrator, monitor, and quality assurance reviewer) completed 18 new local titles, of which three were uploaded to BARD for nationwide patron access. There were four completed and circulated re-records of original Montana cassette books that were unable to be converted.

Volunteer recordings of two popular Montana magazines, two MTBL [Bits of Gold](#) newsletter issues, and one voter information pamphlet (for the 2015 Montana Legislative session, in partnership with the Montana Secretary of State's office) were completed during the reporting period. Subscribers to [Bits of Gold](#) totaled 2,280 and received the newsletters in digital book format (189), large print (2,080), and e-mail (11). The newsletters were also posted on the MTBL website and Facebook account.

MTBL patrons requested 34 Montana titles to be recorded, of which 14 were in process at the end of the reporting period.

Activity Details

Title: Training and Outreach

Abstract:

MTBL engaged numerous organizations and audiences around the state during this reporting period with the objective of increasing awareness of MTBL services among low-vision and blind Montana residents. MTBL staff participated in 20 outreach information and training sessions in Helena as well as in Billings, Bozeman, Butte, and Great Falls.

MTBL staff presenting training and outreach to these organizations: Montana Blind and Low Vision Department; Montana American Council for the Blind (MACB) consumer group; Montana Veterans Administration; Butte Housing Authority; various chapters of the Montana Association for the Blind; Montana Library Association; National Federation of the Blind – Montana chapter; Great Falls low vision group; Touchmark retirement home book club; Overhear Consulting Company; Montana Health Care Association; and Eagles Manor retirement home. Additionally, MTBL staff provided information and demonstrated services for state legislators at the Montana Library Association's Library Legislative Day in January 2015.

Training and outreach sessions covered the use of MTBL software and hardware for patrons, including BARD, the NLS digital talking book machines and accessories, new audio and tactile accessible U.S. currency readers, new developments by NLS for adopting United English Braille symbols, and the NLS development of ideas for creating a Braille accessory for the NLS digital players.

Additional outreach activities included the setup of a digital lending library for new students attending the Montana Association for the Blind's Summer Orientation Program (SOP) for newly blind or low vision students at Carroll College, Helena; and a partnership with a local organization, Helena Industries, which serves and employs Montana individuals with disabilities. MTBL partnered with Helena Industries to implement a Veterans back-to-work assessment program. In this program, Helena Industries selected a veteran for MTBL to train in a variety of computer and technical skills for a set period of time. Helena Industries assessed the applicants' skills and abilities, and groomed the trainee for workforce entry and recommended them for vocational education.

Activity Details

Title: Volunteer Program

Abstract:

A Volunteer Program is available to assist staff with daily supportive tasks that support the circulation, clerical, and recording program efforts of MTBL, as well as with various small tasks on special projects. Volunteers are vital to the success of MTBL. Each volunteer receives thorough ongoing training, monitoring, and assignments by and for the support of the MTBL staff.

During this reporting period, 99 volunteers contributed 11,346 hours in support of the MTBL program. A full-time Volunteer Director coordinated the work of these volunteers. These tasks included processing of incoming and outgoing books, book inspections, repairing books, labeling cassettes and book

containers, repairing books and duplicating new magazines and providing clerical support. The Telephone Pioneer volunteers were responsible for inspecting and repairing each talking book playback machine. The Recording Program made use of volunteers for narrating, monitoring, and reviewing the recording of Montana books or books by Montana authors.

Project Outcomes

List any important findings or outcomes from your project:

Reader Advisors fielded 27% more requests from patrons, from 14,882 requests in the FY13 LSTA reporting period to 18,953 requests in this reporting period. The number of BARD users increased by 4% during this reporting period. The number of BARD downloads increased by 19%, from 19,790 in the FY13 LSTA reporting period to 23,525 during this reporting period. Volunteer hours increased by 21%, from 9,400 hours in the FY13 LSTA reporting period to 11,346 hours in this reporting period.

In August 2014, the MTBL Regional Librarian and the Director of Volunteer services were recognized with an award for partnering with Helena Industries.

In July 2015, the NLS Western Region Consultant performed the biennial review of MTBL services and operations. Pending the final report due in December 2015, preliminary results revealed that the MTBL program met the current NLS and American Library Association (ALA) service and operation standards.

MTBL patrons continued to provide feedback expressing gratitude for the high quality of service they received from MTBL staff and volunteers. A few examples: "I was in the 163rd infantry regiment in WWII. I just read 'From Poplar to Papua'. I was very excited that you recorded a book that actually intersects with my own personal history. I love what you do and am thrilled with this book. Thank you for recording it." (Laurel) "MTBL is a major lifeline for me to the outside world through your library services for the blind. I am eternally grateful for your timely response in replacing my books, magazines and player when my original ones were damaged too badly to be repaired. I was totally isolated and lost without them." (Billings) "I'm grateful for the step-by-step instructions on how to order my own books through the online catalogue. I received all four books I reserved online. My talking book readers' advisors are excellent trainers." (Ennis) "I enjoy my books, especially those my (readers') advisor selected for me and those I've recommended and received right away. Your library is truly a blessing for those of us without sight." (Bozeman) "As an artist who loved my ability to paint, finding talking books before I went blind was a miracle! Thank you for providing me with a new interest and direction." (Havre) "I include the blessing of your books every night in my prayers, and remember you who work so hard to give me so much reading enjoyment. Discovering books by Longmeier and the Peter Bowen books have opened up my world for books I never would have discovered on my own before losing my vision. You've made it fun to read again." (Bozeman) "MTBL provided me with a connection which made more vivid the world of ideas. I very much appreciate your work and this service and as well as to others in need of it." (Helena)

What methods did you use to determine your findings? Check all that apply.

Review of Administrative Data

Participant Observation

Do you anticipate continuing this project after the current reporting period ends? Yes

Consulting Services Project

Abstract:

As part of its strategic plan, the Montana State Library offers consulting services and training opportunities to public librarians and trustees in order to help them respond to the needs of their local communities, collaborate with colleagues statewide, and provide relevant library services in a rapidly changing, information rich world. In addition to consulting in the areas of library law, administration, and budgeting, the three Library Consultants are assigned responsibilities in the areas of e-rate, digital literacy, information technology, access to information and resources, community development and partnerships, and lifelong learning.

State Goal: Consultation and Leadership

Director Name: Sarah McHugh

Budgets

Salaries/Wages/Benefits

Description

\$203,737.93 in FY14 LSTA for salary and benefits for three full time Library Consultant positions

Travel

Description

\$13,359.62 in FY14 LSTA for travel around Montana to libraries for 135 consulting visits and travel to 10 conferences and meetings At least one consultant represented the State Library at the following conferences during the reporting period: American Library Association 2015; Public Library Association 2014; Pacific Northwest Library Association; Mountain Plains Library Association; Montana Library Association; Montana State Library Fall Workshops; Montana Library Association Offline Retreat; Montana Library Association Academic & Special Libraries / Public Libraries Divisions Retreat; E-Rate training; and Silicon Flatirons Roundtable.

\$1,834.45 in FY14 LSTA for conference registration

Other Operational Expenses

Description

\$2,400.57 in FY14 LSTA for office phone

\$992.40 in FY14 LSTA for three Citrix GoToMeeting licenses for consulting staff

\$148.50 in FY14 LSTA for office supplies

Intents

Improve the library workforce.

- Library Infrastructure & Capacity

Project Activities

Activity Details

Title: Public Library Administration Training

Abstract:

The three Library Consultants planned and carried out training sessions for public library boards and new public library directors to help them become familiar with the laws, standards, and best practices necessary to provide and maintain successful library services.

Basic library trustee training from the State Library includes an overview of the State Library's Trustee Manual, which covers the essentials of what it means to be a trustee, the board's relationship with the director and staff, laws and ethics, personnel, community relations, and the services of the State Library. Board training sessions in a wider variety of topics were also made available through the Library Consultants in the areas of long range planning, library facilities planning, the State of Montana's budgeting and accounting system, and other areas related to board development and assistance.

New director training includes an initial visit from the library's assigned Consultant, during which the Consultant introduces the new director to various essential information: Montana's Public Library Standards, the requirements for receiving state aid monies, the Public Library Statistics annual collection process, and the statewide services, projects, and library development staff available to them, including the Montana State Library Network Advisory Council and the State Library Commission. In these initial and subsequent follow up visits, the Consultant builds a relationship with the new director, responding to budget, personnel, project enrollment periods and other questions they tend to have as they begin their work.

Activity Details

Title: E-Rate Consultation

Abstract:

E-rate is a federal discount program for telecommunications and Internet services for schools and libraries. It provides discounts of up to 90% on eligible services and equipment, thus allowing libraries and communities to stretch their dollars and get more for less. One Library Consultant was tasked with assisting Montana public libraries with E-Rate by keeping library applicants apprised of deadlines and

requirements, reviewing applications, serving as a liaison between USAC (Universal Service Administrative Company) and Montana library applicants, answering questions about the program, and providing training and one-on-one assistance as needed.

This Consultant helped 54 libraries file 111 funding requests during this reporting period.

Activity Details

Title: Development of Resources for Library Staff and Trustees

Abstract:

The consulting staff created learning resources to assist public library staff and trustees in understanding best practices in budgeting, community engagement and partnerships, strategic planning, library ethics, creating useful policies, and library district planning.

Budget and finance presentations/handouts (and revisions) were used for workshop presentations and are available for reference on the State Library Learning Portal when directors or board members have questions about funding and accounting procedures.

Community engagement slides were used in workshop training sessions and one webinar. Community engagement training sessions focused on Asset Based Community Development, Harwood Institute "Libraries Transforming Communities" community conversations, and Montana librarians' ideas and best practices for community partnership and engagement.

Strategic planning presentations were used for onsite board training sessions and one webinar. Directors and trustee who attended have the knowledge and tools to undertake strategic planning in their organizations.

Ethics slides were use in two workshop training sessions for librarians. "Everyday Ethics in the Library" gave staff and trustees an opportunity to identify, affirm, and develop ethical principles in their library policies and service responses through interactive scenarios and sharing best practices. Librarians can use the presentation when conducting ethics workshops in their own libraries.

Consultants created a Library District template and made this available on the Statewide Library Resources website consulting page. The template assists directors and trustees with the planning process for becoming a library district.

Consultants maintained a webpage expressly for library board members on the Learning Portal. On this page, trustees can find training materials on hiring a new director; understanding budgets, finance, and library laws; developing library policies and strategic plans; and developing leadership at all levels.

Additionally, library consultants created resources to supplement training and consultation on timely events pertinent to public libraries, such as Affordable Care Act open enrollment. One consultant created and maintains a web page which helps librarians keep up with resources and events relating to open enrollment periods so that they can provide assistance to citizens in their communities who want to sign up for health insurance.

Project Outcomes

List any important findings or outcomes from your project:

Through formal training and orientation sessions, new library directors and board members became familiar with their responsibilities and with the wide variety of resources available, resulting in improved library services in their communities. State Library consulting contributed to the success of many administrative efforts in small public libraries around the state facing challenging situations. Consultants assisted two libraries in revising interlocal agreements; one library with board reorganization; one library with securing increased mill levy funding; and one library federation with transitioning to new leadership. Consultants also contributed to the development of a new staffing/compensation plan to assist directors and boards with attracting and retaining excellent employees. The Library Consultants helped prepare public libraries for connecting with new partners and collaborating to design community outreach programs. For example, many Montanans signed up for health insurance coverage during the Affordable Care Act open enrollment at 25 local libraries through statewide and local partnerships with organizations such as Montana Primary Care Association, Pacific Source, and Community Health Partners. 54 libraries received over \$92,000 in e-rate funding. This helped them pay for voice and Internet services for their communities and enables them to connect with outside resources.

What methods did you use to determine your findings? Check all that apply.

Survey

Interview/Focus Group

Do you anticipate continuing this project after the current reporting period ends? Yes

Do you anticipate any change in level of effort? Yes

During this reporting period, a Library Development Study Task Force was appointed by the State Librarian consisting of librarians from all types of libraries. A primary purpose of this study was to inform the State Library on how LSTA, as well as state Coal Severance Tax monies, are spent, beginning with the federal fiscal year 2016 LSTA award. The statewide consulting services were included in this evaluation effort. Findings from a statewide survey and listening sessions were that librarians value the consulting services the State Library provides. Reaction was mixed about whether to continue assigned consulting territories for the three State Library Statewide Consulting Librarians. The State Library will need to continue a level of consulting in the general areas of library administration, law, budgeting and board development, because these are fundamental building blocks to public library operations. The State Library will also need to continue to find ways to meet consulting needs of Montana libraries in the 21st century--broadband expansion, digital literacy, community partnerships and lifelong learning--because

doing so helps to ensure Montana communities are served by modern libraries that meet the needs of those communities. The challenge will be to find a balance and method for providing both.

Do you anticipate any change in the project's scope? Yes

Based on the task force recommendations, the State Library anticipates increased emphasis on specialty consulting areas. Current examples include broadband expansion, digital literacy, community partnerships, lifelong learning and technology support. Responding to a suggestion from the task force listening sessions and anticipating more focus on specialty areas, the State Library anticipates creating an online “help desk” approach to some consulting needs so that any of the three consultants could respond to a question using this environment. The State Library anticipates increased time spent in training and consulting in specific areas that improve a library’s ability to meet the needs of their users. Examples include more technology consulting and assistance with developing public computing centers. These changes would be the result of the task force study and recommendations which reflect feedback from librarians around the state.

Traveling Makerspace Pilot Project

Abstract:

The purpose of the Montana Makers traveling makerspace pilot was to create opportunities through local libraries to expose primarily school-aged Montanans to STEAM (science, technology, engineering, arts, mathematics) tools and resources that are not otherwise easily accessible in most Montana communities. Additionally, library staff across the state would have the opportunity to try out maker materials before committing funds to purchase materials that would be appropriate for their communities.

The various tools and materials in each portable makerspace trunk supported development of new afterschool programs and actively encouraged makers to develop and utilize skills such as critical thinking, problem solving, communication, collaboration, and creativity. Six identical trunks were available to any Montana libraries for a 12 week loan. Each trunk contained tools that safely teach concepts of circuitry and computer programming (Arduino, MaKey MaKey, PCS Edventures Robotics, Raspberry Pi, Snap Circuits, Squishy Circuits), construction and engineering (BrickLab, Discover Engineering), and astronomy (Orion telescope, maps, and planisphere), as well as traditional craft skills (sewing, knitting, crochet, and painting tools).

One important component of the pilot to further this objective was that hosting library staff was asked from the outset to identify potential partners and opportunities for collaboration during the hosting period, to articulate desired outcomes, and to evaluate their program at the end of the hosting period. Details about this process are included under the "Makerspace Programs in Libraries" activity.

State Goal: Partnerships and Collaboration

Director Name: Cara Orban

Additional Materials

☞ <http://libraries.idaho.gov/files/ExecutiveSummaryOctober2015.pdf>

Budgets

Salaries/Wages/Benefits

Description

\$1,257.77 in FY14 LSTA for Communications Coordinator staff time

Staff worked with a contract designer to create a logo (attached to this report) which was printed onto durable stickers to identify makerspace kit pieces, and was made available to hosting library staff to

create their own promotional pieces. This helped to increase recognition and visibility of the pilot and enable a stronger promotional effort in hosting communities.

Supplies/Materials

Description

\$1,923.82 in FY14 LSTA for additional equipment for six circulating makerspace kits. Electronic textiles (e-textiles) kits were added to each of the six makerspace kits during this reporting period. Electronic textiles (also known as soft circuits) projects demonstrate basics of circuitry through the traditional craft of sewing. Makers have the opportunity to be creative with technology through relatively inexpensive materials such as conductive thread and LEDs used in a medium that staff and volunteers find familiar and accessible. Each e-textile kit contained one bobbin of 2 ply conductive thread; five sewable CR2032 battery holders; five coin batteries; one needle set; two LED beginners sewing kits from Adafruit; five LED 20-packs; ten RGB LEDs; round nose pliers for manipulating LEDs; embroidery hoops; 3 ply conductive thread for circuit embroidery; and ten sets of magnetic snaps.

Intents

Improve users' general knowledge and skills.

- Science, Technology, Engineering, & Math (STEM)
- Outreach & Partnerships

Project Activities

Activity Details

Title: Makerspace Programs in Libraries

Abstract:

15 libraries hosted makerspace kits during this reporting period. Libraries were expected to plan for structured activities which would make use of the maker kits, and articulate in their hosting applications the specific resources (staff time, materials, funding, meeting space, and training) that they and their community partners would contribute toward the implementation of these plans.

In the application, libraries also identified partners as well as program expectations and desired outcomes to be met through maker activities. At the end of the hosting period, hosting libraries completed an evaluation form for the State Library in which they provided feedback and reported whether or not they achieved desired outcomes.

While some libraries opted to focus structured programs on one or two related tools such as circuits, others hosted open houses with maker stations, where makers could visit different tables staffed by volunteers to try out various components from the maker kits.

Activity Details

Title: Makerspace Orientation for Library Staff

Abstract:

The Statewide Projects Librarian led five hour-long orientation training webinars or in-person sessions for hosting libraries to help familiarize library staff with the makerspace tools and learning resources in advance of receiving the kit, which was a suggestion that emerged from evaluations in Fall 2014.

The Statewide Projects Librarian also led one, hour-long online session for a broader audience, introducing the Montana Makers pilot to an audience of 24 public, school, and state library staff from Montana as well as from Georgia, Iowa, Colorado, Vermont, and Virginia. Objectives for this webinar were to provide public or school libraries with a concise list of questions to help plan and prepare for developing a makerspace, particularly for libraries with limited space and budgets, and to introduce a selection of materials from the kits with details about pricing, potential audience, and relevant STEAM disciplines.

Activity Details

Title: Makerspace Planning Document Preparation

Abstract:

Through spring and summer 2015, the Statewide Projects Librarian worked with a Library Consultant at the Idaho Commission for Libraries to gather and organize survey information from small and rural libraries in both states in order to create a best practices guide for smaller libraries that are interested in starting a makerspace.

Questions were organized around the considerations of materials, staff training, space, community partnerships, and budget. This work culminated in a report (attached to this project report) and an in-person presentation for 80 attendees at the Association for Rural and Small Libraries conference in Little Rock, Arkansas, at the end of this reporting period.

Project Outcomes

List any important findings or outcomes from your project:

Of the 15 libraries that hosted makerspaces during this reporting period, eight responded that they initially wanted to host a maker kit “to increase young adult/teen programming”; six responded “to increase STEM related programming”; four responded “to provide new services and new opportunities through the library”; and four responded “to try out makerspace materials before purchasing.” In the

evaluation, these libraries responded that they were successful in increasing STEM related programming (10 responses); providing new services (five responses); increasing community participation in library programs by attracting new users to the library (four responses); and increasing the number of programs for young adults and teens (two responses). Hosting libraries almost unanimously stated that they benefited from being able to test makerspace materials through the pilot before purchasing items for their libraries (13 responses). In the pre-hosting application, most (12) hosting libraries stated that they believed “technology” would be of greatest interest to young adults, followed by building (five), arts (four), and science (three).

In the post-hosting evaluation, technology did not fare quite as well with only eight libraries stating that those tools had been the most widely used. Arts and crafts (nine) were most popular. Ten libraries responded that technology tools had been used the least, in part because pieces such as the Arduino were difficult for library staff and volunteers to understand in a short amount of time in advance of planning programs. When asked what changes they would suggest for improving the content of the maker kits, five libraries suggested “more project examples from other libraries, better documentation, and more training;” four libraries suggested that content be separated into smaller, separate kits with a more specific focus; and three libraries requested more consumable materials (paper, glue, batteries) and accessories as these expendable items became a considerable expense in sustaining programs.

Libraries identified partners in their communities as being predominantly professionals or experts in a specific field (scientists, information technology professionals, medical professionals, engineers, and electricians, among others); or K-12 school faculty and students or student groups. Local organizations and afterschool groups such as the YMCA, 4-H, and the county extension office were also identified as program partners. Two libraries reached out directly to neighboring libraries to partner on programs or to ask for advice on planning programs.

Please briefly describe importance of findings.

Libraries that plan to introduce making in their communities should budget ample time for becoming acquainted with the tools and for developing partnerships to help make the most of available equipment. The State Library has transferred responsibility of maintaining the makerspace kits to the six library federations (somewhat similar to regional library systems). For future projects, based on the evaluation results, State Library staff would recommend that content be grouped together in smaller, more focused kits with concrete project examples from area libraries and more documentation to help guide hosting libraries toward meeting their desired outcomes. Perhaps most importantly, this pilot demonstrated that partnerships are available to libraries in communities of all sizes, and that there is a volunteer base for them to leverage so that, through careful planning, even smaller libraries with limited staff and resources can extend their offerings and attract new library users.

What methods did you use to determine your findings? Check all that apply.

Survey

Do you anticipate continuing this project after the current reporting period ends? No

Share your Story Pilot Project

Abstract:

Share Your Story is a project of the Montana State Library in partnership with Montana public libraries to collect and share Montana stories through videos and podcasts. Montana libraries must develop a proposal that focuses on why they want to host the Share Your Story project, their community partners, and how they will promote themselves as a host site. Montana libraries are responsible for recruiting interviewees, for recording the stories, and for uploading the stories to the Share Your Story site. The State Library reviews material and may select certain applicable stories for inclusion in the Montana Memory Project.

State Goal: Partnerships and Collaboration

Director Name: Cara Orban

Budgets

Salaries/Wages/Benefits

Description

\$1,172.62 in FY14 LSTA for Communications Coordinator hours

Supplies/Materials

Description

\$77.70 in FY14 LSTA for printed promotional posters and postcards for public libraries to distribute for Share your Story pilot

Intents

Improve users' ability to participate in their community.

- Arts, Culture & Humanities

Project Activities

Activity Details

Title: Recording of Community Conversations

Abstract:

During this reporting period, two libraries completed their recording projects.

Missoula Public Library received a National Endowment for the Arts grant to host the “Big Read” program in Missoula in Autumn 2014, and partnered with local veterans organizations to provide programming to accompany the book *The Things They Carried* by Tim O’Brien. The veterans were interested in partnering with the library to collect oral histories in recognition of the 50th anniversary of the Vietnam War. The veterans provided volunteer time organizing the individuals to be interviewed and their interviewers, and provided means for the veterans to get to the space where the interviews took place. They collected seven interviews in total with veterans of various 20th Century wars.

Butte-Silver Bow Public Library collected seven interviews with members of the Butte area lesbian, gay, bisexual, transgender (LGBT) community. These interviews were also added to the Montana Memory Project.

At the end of this reporting period, three other libraries had received recording kits and had begun planning projects but had not yet recorded interviews: Hearst Free Library in Anaconda, Philipsburg Public Library, and Preston-Hot Springs Public Library.

Project Outcomes

List any important findings or outcomes from your project:

As a result of this project, Montana libraries had an opportunity to digitally collect and share cultural heritage in their communities; incorporate oral history interviews into existing public programs; draw new patrons into the library; take library resources out to the community; support hands-on technology training; promote intergenerational activity; and form community partnerships to assist in promoting and collecting interviews.

Do you anticipate continuing this project after the current reporting period ends? Yes

Limited staff and funding resources at the State Library limit our capacity to sustain this pilot, though the equipment will continue to circulate and content

Do you anticipate any change in level of effort? Yes

Limited State Library staff and funding resources must now be focused on higher priority efforts. This effort was conceived as a pilot in order to introduce libraries to the idea of being curators in their communities and to provide the equipment necessary to assist them in meeting the outcomes identified above. However, the equipment continues to circulate to public libraries and content will continue to be added to the pilot site and, where applicable, to the Montana Memory Project.

Match-Only State Project

Abstract:

State funding is provided in statute to strengthen public library services for all Montanans. The Montana State Library administers per capita and federation funds and distributes these funds to public libraries as directed in statute and the Administrative Rules of Montana. Montana public libraries often make use of this funding to participate in LSTA-supported projects of the State Library.

Annual state aid funding to Montana's public libraries is established in [Montana Code](#). Its purposes as described in statute are to broaden access to existing information by strengthening public libraries and public library districts; augment and extend services provided by public libraries and public library districts; and permit new types of library services based on local need. The State Library distributes this funding based on a per capita/per square mile formula set forth in the Administrative Rules of Montana (ARM 10.102.4003). A library receives state aid dependent on meeting Montana's Public Library Standards, described in the Administrative Rules of Montana.

Montana's libraries are grouped into six regions known as federations. Federations receive funding through the State's Coal Severance Tax monies and that is distributed through the State Library based on a formula established in the Administrative Rules of Montana. Montana's library federations provide formal and informal opportunities for continuing education, networking and improving library services in Montana. Originally, only public libraries participated in federations. In 1999, the Legislature expanded the law to allow all types of libraries to participate in the federations, including school, academic, and special libraries. However, with a few exceptions that are eligible through the Federation Plans of Service, only public libraries receive federation funds.

The Network Advisory Council (NAC) represents the interests of all types of Montana libraries and maintains the perspective of statewide geographical balance as it explores technology resources, assists with the official procurement process of those resources, reviews and evaluates the feasibility, design, and outcomes of statewide library projects; assists with statewide planning, and advises the State Librarian and the State Library Commission as appropriate. The NAC met four times during this reporting period.

State Goal: Consultation and Leadership

Director Name: Sarah McHugh

Budgets

Other Operational Expenses

Description

MATCH: \$197,883 from the State for per capita state aid to public libraries

MATCH: \$88,061 from the State for federation funds to public libraries

MATCH: \$1,253 from the State to support the work of the Network Advisory Council

Intents

Improve library operations.

- Library Infrastructure & Capacity

Project Activities

Activity Details

Title: Library Federation Meetings

Abstract:

Each of the six federations held two membership meetings during the reporting period, one in the fall and one in the spring. Libraries were expected to attend these meetings since they provide an opportunity for communication, continuing education, and planning their annual plans of service. The goals of each federation were specified in the plans of service, which was created by federation libraries and submitted to the State Library commission for approval prior to implementation. Plans of service included objectives for meeting community needs through interlibrary loan, technology, cooperative purchases, and continuing education and training.

Each federation has a coordinator who is chosen from one of the member libraries in the federation.

The federation coordinator was responsible for facilitating all federation activities, including organizing the federation meetings, plan of service, annual report, and continuing education activities. At the end of the fiscal year, each federation coordinator submitted an annual report for their respective Federations based on the individual reports submitted by libraries in those federations.

Project Outcomes

List any important findings or outcomes from your project:

Library directors and boards have discretion over how to spend their State Aid allotment. A library's Federation funding must be used for expenditures that fit within the programs of the annual Plan of Service for their Federation. This funding has been used by libraries to increase open hours, increase Internet bandwidth and access, participate in continuing education opportunities, complete a facility upgrade, create promotional materials, increase programming and services, expand collections, engage in community outreach, and encourage community discussions as part of defining a library's core services of value to their community. Library directors, staff, and trustees benefited from the federation structure by coming together twice a year to receive training in many relevant areas, including library administration and community outreach, and to network with one another on new technologies and best practices. Libraries typically used their federation funding to help cover the costs of participating in

statewide resource sharing efforts such as the courier, MontanaLibrary2Go, Montana Shared Catalog, or OCLC participation costs, and to cover the cost of attending state and regional conferences.

What methods did you use to determine your findings? Check all that apply.

Review of Administrative Data

Participant Observation

Do you anticipate continuing this project after the current reporting period ends? Yes