FY 2017 Library Development Project Proposal Form

As you complete this form, please refer to:

The FY 17 Library Development Budget approved by the MSL Commission on April 6

 The Library Development Study Task Force Recommendations

The IMLS list of LSTA-specified Grants to States Priorities

The current version of the Evaluation Planning Guide for Library Development Projects and Services

Section One: Basic Information

1. *Project Title:* OCLC Group Services

2. *Do you consider your project to be a one- time pilot that is not connected to any existing project or service? Or, does your project add services, access or content to an existing project? Please explain.*

   OCLC Group Services, which uses software hosted by OCLC, has been identified by the Network Advisory Council as an LSTA funded program of the State Library.

3. *How does your project fall under a broader umbrella—i.e., one of the larger efforts described in the LDSTF Recommendations or in the IMLS list of* LSTA-specified Grants to States Priorities? *If so, which one? Please explain.*

   The online tools available to library staff through Group Services meet desired outcomes identified under Library Infrastructure in the LDSTF Recommendations.

   - Enables the end user to get resources & services, easily, seamlessly, utilizing current technology

   - Is both accessible & affordable

   - Encourages consortial resource sharing to make information resources, technology and service delivery more efficient, effective, affordable, customizable, sustainable, scalable

   This contract also helps meet the following priorities of the Grants to States program:

   - Establish or enhance electronic and other linkages and improved coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services

   - Develop library services that provide all users access to information through local, state, regional, national, and international collaborations and networks

4. *Primary Project Manager:* Cara Orban

5. *Other MSL staff that will be involved in the project's implementation:*

6. *Potential partnering institutions or entities for the project:*

   Libraries

7. *Total FY 17 Library Development funding approved by the MSL Commission for this project/service? (not including MSL funded personnel):*

   $46,971 in FY17 CST monies

   $46,082 in FY16 LSTA

   $3,000 in FY15 LSTA

   Please indicate whether the funding source is FY16 LSTA or FY17 CST monies. Note that some items in the FY 17 Library Development budget have funding from both sources. If so, please indicate each amount.

Section Two: Audience, Benefits and Outcomes, Evaluation

1. *What is the primary audience for this project?*

   Library staff will use these tools for the benefit of end users (library patrons, students, and researchers).

2. *How will the project benefit this audience?*

   The State Library's contribution to the Group Services contract reduces costs to enrolled libraries.

Expected outcomes for end users:

The number of holdings in WorldCat representing items in Montana libraries increases each year; library patrons are able to easily discover and request these items through their local libraries.

3. *Please list additional outcomes of the project. Refer to the specific outcome statements within the LDSTF Recommendations as well as the IMLS LSTA priorities. Note that the LDSTF statements are prioritized and that this is the first year of several to come of addressing these goals. Be specific.*

4. *Your project is expected to include evaluation techniques that utilize the steps outlined in the Evaluation Planning Guide for Library Development Projects and Services. Please describe the evaluation methods and processes you will engage in for this project, based on the information in the Guide.*

Inputs:

Funding available; training; time spent planning and implementing project (enrollment and maintenance of contract)

Outputs:

- Number of attendees at trainings
- Number of training sessions (online and in person)
- How many training hours/minutes available to the audience
- Usage statistics (number of new or updated records; number of ILL transactions)

Outcomes:

Expanded resource sharing and collaboration among Montana libraries results in greater circulation and interlibrary loan between libraries.

Section Three: Timeline

1. *Please give a <u>detailed</u> timeline for the project. The timeline should include all aspects of the project, including initial evaluation planning, project planning, implementation, launch and ongoing management, and if applicable, an end date. If you are creating training proposals for the funding period, please prioritize them. Do you anticipate continuing this project after the current funding concludes? Explain why or why not.*

The contract for OCLC Group Services runs July 1 – June 30. OCLC typically invoices MSL for its funding commitments in full within one month of submitting the final enrollment spreadsheet. SLR staff expects to receive all invoices prior to September 2015.

This project is expected to continue as long as the demand for these services exist among Montana libraries.

2. *Do you anticipate any change in level of effort or scope during the project? Explain why or why not.*

    SLR staff expects to engage in contract negotiations with OCLC for the next three year renewal prior to FY18.

Section Four: Marketing Needs

1. *What marketing needs do you anticipate for your proposed project?*

2. *If a third party vendor is involved, what marketing assistance can the vendor supply?*

3. *Do you anticipate needing the MSL Marketing Coordinator's assistance with marketing your project? If so, how much time do you anticipate will be needed?*

Section Five: Proposed budget and spending calendar

1. *Please give a <u>detailed</u> budget proposal for the project. The budget should include all potential direct costs for the project (not including MSL funded personnel). Typical costs may include, but are not limited to:*

   Contracted speakers, trainers or consultants including associated travel
   Event locations, catering, services
   Services or content provided by third-party vendors
   Hardware or software
   Supplies and materials
   Equipment
   Marketing

   FY17 Group Services:

<u>$135,247 WorldShare Interlibrary Loan</u>

- $98,885 State Resource Sharing Funds
- $33,362 FY16 LSTA
- $3,000 FY15 LSTA
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<u>$46,115 FirstSearch + $314,720 Unlimited Cataloging & Access = $360,835</u>

- $38,142 FY17 CST
- $12,666 FY16 LSTA
- $304,244 anticipated library enrollment fees

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<u>Projected minimum gap between enrollment fees and Cataloging subscription cost: $5,783</u>

- $5,783 FY17 CST

$3,046 EZproxy

- $3,046 FY17 CST

2. *Please give a close estimate of a spending calendar for the project. As you put this calendar together, consider whether or not your project will require an ITPR, RFI, RFP or Solicitation for Bid. Federal award FY16 LSTA expenditures should be completed well ahead of the September 30, 2017 spending deadline. State FY17 CST expenditures must be completed ahead of the June 30, 2017 deadline.*