

# Montana State Library Library Development Work Plan July 2018 – June 2019

Green (no font distinction) – activity progressing as expected.

Yellow (*italicized*) – activity may be delayed but the delays do not necessarily rise to the level of Commission concern

Red (**bolded**) – activity is delayed and Commission attention is warranted

Blue (underlined) – addition or change to the original work plan.

## Strategic Framework – Foster Partnerships

### Mind in the Making Training

- Amelea Kim contacted the participants to identify progress. A few have implemented their projects while others have struggled. Amelea is analyzing what we have learned from this project and what we might do differently to help participants apply what they learned. Participants reported that it greatly changed how they approach things individually, but in most cases what they learned hasn't been applied in work with other members of their community.

Inputs	Outputs	Outcomes/Impacts
Materials, supplies, MSL staff time, MITM Trainer Time	2.5 day early learning boot camp - COMPLETED	<p>Desired Outcomes</p> <ul style="list-style-type: none"> <li>• Library participants will work to develop partnerships with other institutions/organizations that support early learning in the community</li> <li>• Participants will design a systemic approach based in science to support early learning throughout their community.</li> <li>• MITM has specific learning outcomes for attendees including that attendees enhance their own skills in the 7 areas; promote those skills in young children; help preschoolers and older children develop these skills and strategies for developing the skills. The 7 skills are: focus and self-control; perspective taking; communicating; making connections; critical thinking; taking on challenges; self-directed, engaged learning</li> </ul> <p>Desired Impacts</p> <ul style="list-style-type: none"> <li>• Library and community partners identify how to help children in their community gain these skills.</li> <li>• Children in these communities develop the 7 executive function skills.</li> </ul>
Edwards Foundation funds	# of attendees - public libraries, Childcare Resources Center, and community partners	
Bezos Family Foundation Funds	Projects from attendees	
Childcare Resources Center funds	Regular webinar series to help students apply what	

	they learned – WEBINARS COMPLETED	
LSTA funds		

Community Compass Pilot Project

Inputs	Outputs	<b>Outcomes/Impacts</b> Desired Outcomes <ul style="list-style-type: none"> <li>• Library staff implement at least one idea or suggestion from the listening session</li> <li>• Librarians, board members, and MSL staff understand what goals community members have – community aspirations</li> <li>• Librarians, board members, and MSL staff understand what concerns/challenges people have – community concerns</li> <li>• Librarians, board members, and MSL staff identify ways to use their knowledge to design library services/programs that address non-user challenges and/or aspirations (LDSTF Recommendations – Library Directors and Boards analyze, understand, and reflect community needs; create and communicate a vision)</li> </ul> Desired Impacts <ul style="list-style-type: none"> <li>• The library works with other community partners to address community aspirations and concerns</li> <li>• Community support for the library increases</li> </ul>
Materials, supplies	3-6 listening sessions facilitated by the Statewide Consulting Librarians	
LSTA funds	# of attendees at the Chamber of Commerce meetings	
MSL staff time	Ideas generated from the discussion	
Librarian and Chamber of Commerce members' time	Regional/statewide themes that can be used to develop programs or provide new services at local libraries and/or statewide	

**Strategic Framework – Secure sufficient and sustainable funding**

**Activities:**

- **Develop models of cooperation for libraries (Supports LSTA Goal 5, Statewide Consulting Objective A)**
- **NOTE: Lauren McMullen will be leaving the State Library at the end of the year in order to pursue new opportunities. She was the lead for this project. Jennie and Tracy will visit about next steps for this project.**

Inputs	Outputs	Outcomes	Impacts
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Time of Lauren McMullen	Develop a publication describing different economic/governance models for public libraries.	Library directors and board members learn about different economic models.	
Research material from other states (COMPLETED)	Library directors and board members use this publication	Libraries use this information to evaluate and improve their governance structures (LDSTF)	
	Create an outline and scope of work for project (COMPLETED)		

### Cost Formula Task Force

- [The Task Force defined their concerns and success measures but did not come to a consensus. Some key points worth considering:](#)
  - [The need to address “affordable” and what that means for the various libraries that participate in statewide projects](#)
  - [The need to obtain adequate funding for various projects](#)
  - [The need to define “equitable”](#)
  - [The need to identify what libraries value and what successes they need to see to request/find additional funding for a project](#)
- [Cara Orban, Jennie Stapp, Tracy Cook, Pam Henley, and Suzanne Reymer will be meeting to discuss this work](#)

Inputs	Outputs	Outcomes	Impacts
Time of Cara Orban and 14 Task Force members	<ol style="list-style-type: none"> <li>1. Defined criteria for evaluating whether cost formulas and membership models meet collaborative goals (completed)</li> <li>2. Any of all of the following: a formula, policy, or model that can be applied to all collaborative pay-in projects which help achieve the stated outcomes</li> </ol>	<ol style="list-style-type: none"> <li>1. Annual project costs are predictable, justifiable, and fair, so that library directors can effectively plan for and justify their annual budgets.</li> <li>2. Cost formula(s) is/are standardized, comprehensible, adaptable, and easy to explain, so that MSL staff can easily and efficiently</li> </ol>	<p>Libraries’ annual costs are predictable, justifiable, and fair.</p> <p>MSL project management staff benefit because cost formulas are standardized, comprehensible, adaptable, and easy to explain.</p> <p>Cost formulas and policies that are sustainable and flexible enough to encourage future growth while also weathering difficult financial periods.</p>

		<p>prepare and update formula(s) as necessary.</p> <p>3. Consortia can weather difficult financial periods and grow sustainably because they have adaptable cost formulas and policies.</p>	
<p>Research material from other consortia and state library agencies</p>			

**Strategic Framework – Create a useful information infrastructure**

- [Provide strategic planning training for library trustees, directors, and staff](#)

<a href="#">Inputs</a>	<a href="#">Outputs</a>	<a href="#">Outcomes</a>	<a href="#">Impacts</a>
<p><a href="#">Funding</a>  <a href="#">Library Strategies’ staff time</a>  <a href="#">Time of Pam Henley and Suzanne Reymer</a>  <a href="#">Handouts and other resources</a></p>	<p><a href="#">4-6 hours of training at a face to face workshop in Butte on April 24, 2019</a>  <a href="#"># of attendees</a></p>	<p><a href="#">Attendees learn about strategic planning – what it is, why it is important, and typical processes</a></p> <p><a href="#">Attendees use what they learn to complete a strategic planning process at their library</a></p>	<p><a href="#">Community members receive library services that help them thrive.</a></p>

- [Develop a centralized acquisitions pilot project \(Supports achievement of Goal 1, MSC Objectives D and E\)](#)
  - [Jemma Hazen is working directly with Missoula Public Library to begin implementation of the acquisition standards. The Missoula Public Library will be transitioning to pre-processing in early March.](#)

- o [Jemma has also connected with each of the other libraries that are currently using pre-processing to identify a timeline and schedule for each library. She has also begun the behind the scenes work that will need to take place to adopt the standards the group selected.](#)

Inputs	Outputs	Outcomes/Impacts
Time of Jemma Hazen and Tracy Cook	Acquisitions module configured for staff	<p>Desired Outcomes:</p> <ul style="list-style-type: none"> <li>• Standards improve the patron experience.</li> <li>• Standards simplify pre-processing set-up and usage for MSC staff, participating library staff, and vendors.</li> <li>• Standards improve the reports for MSC and library staff.</li> <li>• Library staff can track funding and usage in their desired categories.</li> <li>• Library directors and staff learn about the value of centralized acquisitions.</li> <li>• Montana libraries are more innovative</li> <li>• Directors and staff working together to find meaningful ways to repurpose staff</li> <li>• Montana library users have access to a wider variety of materials and services</li> <li>• Centralized acquisitions creates a better MSC system</li> <li>• MSL Staff learn whether or not Centralized Acquisitions has value for more libraries beyond the pilot</li> <li>• Libraries participating in collaborative efforts are more efficient – the effort saves time and improves workflows</li> </ul> <p>Desired Impacts:</p> <ul style="list-style-type: none"> <li>• Collaboration that is scalable, affordable, implementable for all types of libraries (LDSTF)</li> <li>• Library infrastructure that encourages consortial resource sharing to make information resources, technology and service delivery more efficient, effective, affordable, customizable, sustainable, scalable (LDSTF)</li> </ul>
	Tracking of purchasing [built into Acquisitions module]	
	Accounting of staff time - new projects made possible because of money or time	
	Demonstrated cost savings to participating libraries	
	Demonstrated cost savings to participating libraries	
	Pilot group has completed an initial survey that Hazen will use as a basis for conducting interviews.	
	Interviews of library participants – COMPLETED	
	Analysis of library responses and initial recommendations - COMPLETED	

	Standard list of policies and home locations for libraries participating in the acquisitions pilot project - ADOPTED	
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- Develop a Montana Memory Project Ambassadors program to increase visibility and the usability of the MMP. Ambassadors will introduce the MMP to new audiences and seek opportunities to fund new collections. (Supports LSTA Goal 1, MMP Objective I)

Inputs	Outputs	Outcomes/Impacts
<ul style="list-style-type: none"> <li>• Time of MMP Director</li> <li>• Time of Ambassadors</li> <li>• Online meeting system</li> <li>• Meeting space and materials for annual face-to-face meeting</li> <li>• Materials for Ambassadors</li> </ul>	<ul style="list-style-type: none"> <li>• Ambassadors annual seminar to discuss new content and training for outreach (MLA or MT History Conference)</li> <li>• Presentation template that can be used at community gatherings</li> <li>• Bookmarks, posters, brochures are available for ambassadors' use</li> <li>• Ambassador's local activities that promote the MMP</li> <li>• Promotional materials distributed beyond libraries and museums</li> <li>• More ways to contribute funding (funding button on Facebook)</li> <li>• Evaluation tool for measuring engagement from ambassadors</li> </ul>	<ul style="list-style-type: none"> <li>• The MMP attracts excellent content so that it is a valuable resource</li> <li>• Montanan's utilize the MMP to meet their needs</li> <li>• Ambassadors are engaged in MMP and advancing the goals of the MMP</li> <li>• Ambassadors help to find sources of funding for new projects</li> <li>• Social media activity increases</li> <li>• MMP continues to serve a unique role of making Montana cultural material accessible to all</li> <li>• Visibility of the MMP increases</li> <li>• Revenue sources become more diverse</li> </ul> <p><u>Several Ambassadors have done presentations and outreach efforts so far. The link below is for the Event Report responses. There are two tabs in the spreadsheet – one for 2019 and one for 2018. These presentations reached audiences I would not have been able to reach alone.</u>  <a href="https://tinyurl.com/ybg99w6e">https://tinyurl.com/ybg99w6e</a></p>

Pilot Project for possible new certification pathway

- The following libraries are participating in the pilot project.
  - Belgrade Community Library
  - Chouteau County Library
  - Joliet Community Library
  - Kalispell Regional Medical Center
  - Ronan Library District
- [Library Development staff members continue to contact each library regularly to discuss the libraries' experiences with the pilot.](#)

Inputs	Outputs	Desired Outcomes/Impacts
<ul style="list-style-type: none"> <li>• Time of Continuing Education Coordinator, Consultants, and Library Development Director</li> <li>• Time of public library directors and library staff</li> <li>• Development of a CMS in Moodle; introductory course, review of learner inputs; ongoing interviews with pilot libraries. 10 - 20 hours per month during formative phase. Test ASPeN for filing PPDP Pathway forms.</li> <li>• Formative assessment development</li> </ul>	<ul style="list-style-type: none"> <li>• Pilot pathway that links PD to the strategic plan of the applicant's library, competencies in the field, provides more flexibility in the ways that the applicant can demonstrate learning has occurred.</li> <li>• Different-sized libraries participate; manageable number in the pilot...TBD;</li> <li>• ASPeN is able to handle continuing education tracking</li> <li>• Ongoing data on applicant progress, needs; formative evaluation data within 3-6 months of the pilot to inform a statewide roll-out</li> </ul>	<ul style="list-style-type: none"> <li>• Applicants design rigorous professional development to advance their careers in librarianship.</li> <li>• Libraries utilize the PD Plan Pathway to advance the strategic goals of the library.</li> <li>• MSL staff organize training activities into a coordinated curriculum addressing the needs of our librarians as informed by data. PPD Plans become data that informs MSL staff on what training is needed. Data is accessible and organized for use in planning training activities</li> <li>• Applicants that utilize the PD Plan Pathway to certification advance their careers and the field of librarianship in Montana</li> <li>• Library staff, trustees and stakeholders recognize that their professional development is directly related to the library's success because the library achieves its strategic goals.</li> </ul>

Fulfillment study, August 2018 – April 2019

- A report or data set that helps us understand the value of fulfillment as well as where we can make improvements in the fulfillment process (discovery, checkout, receiving from the patron end; making item discoverable, placing holds/ILLs, transit/shipping if applicable, checkout, notification, pickup, return process from staff end) and/or reduce costs to libraries
- [Orban has completed study of OCLC interlibrary loan and sharing group trends over the past three fiscal years, including data from TRAILS, and has a meeting scheduled with MSC staff to discuss cataloging contract requirements for that consortium. Following that meeting, Orban will draft recommendations for the FY2020 OCLC Group Services contract renewal and funding.](#)

Inputs	Outputs	Desired Outcomes / Impacts
<ul style="list-style-type: none"> <li>• Time of Library Development staff</li> <li>• Vendor reports</li> <li>• Data collection, organization, and analysis tools</li> <li>• Questionnaires and surveys</li> <li>• Library staff time in reporting data</li> </ul>	<ul style="list-style-type: none"> <li>• Report</li> <li>• Contracts</li> <li>• Services</li> <li>• Policies &amp; procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Change in access for previously underserved communities</li> <li>• Any Montana community's local library is able to provide, with reasonable equity (ie, need and desire aligns with available resources), consistently fast and reliable service to their patrons, increasing overall quality of library service</li> <li>• Contracts of appropriate scale and value</li> <li>• Funding is appropriately allocated to services that are of high value to the local community</li> <li>• Equitable cost sharing among participating libraries</li> <li>• Community members are satisfied with and recognize the value of fulfillment services (getting what they need easily) through their local library</li> <li>• Change in knowledge about how fulfillment works in Montana</li> <li>• The Montana library community values and benefits from thoughtful and sustainable collaboration efforts</li> <li>• Increase in resource sharing</li> <li>• Increase in value of collaborative efforts for Montana libraries</li> </ul>



National Health Literacy Month Toolkit Logic Model

- Amelea Kim has created marketing materials, gathered programming ideas, and prepared support materials for libraries to use to promote health literacy.
- [This project is now complete.](#)

Inputs	Outputs	Outcomes/Impacts
Staff time of Amelea Kim	<p>Social Media graphics</p> <p>Printable bookmarks and other graphic templates</p> <p>Powerpoints/classes on health insurance and health literacy</p> <p>Resources for graphic design</p> <p>List of resources for further reading and research on health literacy</p>	<p>Desired Outcomes:</p> <ul style="list-style-type: none"> <li>• Library staff use/remix the materials to create a cohesive marketing campaign for the month of October</li> <li>• Library staff can create their own marketing materials for other resources they would like to highlight</li> <li>• Library staff feel comfortable guiding patrons through trusted and reliable health information sources</li> <li>• Library staff feel comfortable encourage patrons to take responsibility and empower them to take care of their health</li> <li>• Library staff increase their knowledge of relevant community resources for future collaboration</li> </ul> <p>Desired Impacts</p> <ul style="list-style-type: none"> <li>• Patrons will understand the importance of health literacy</li> <li>• Patrons will have access to a ready list of trusted and reliable resources for health information</li> <li>• Patrons will feel more trust in the library and the librarians as a source for health information</li> </ul>
Research material from non-MT organizations	<p>List of health-related webinars for librarians to use</p> <p>List of health-related resources for librarians and patrons to use</p>	

Survey on Health Literacy Programming (input from MT librarians)	List of health programs that other MT libraries have done, along with short descriptions and details  Suggestions on what areas of health programming are needed and wanted for the future	
Previous LLL materials	Health programming ideas on a variety of topics	

[Montana Shared Catalog: new MSC Trainer technical training](#)

<a href="#">Inputs</a>	<a href="#">Outputs</a>	<a href="#">Outcomes</a>	<a href="#">Impacts</a>
<a href="#">Staff time of Jemma Hazen, Rebekah Kamp, and Amy Marchwick</a>	<a href="#">X hours of training and orientation on the MSC integrated library system (ILS), standards, and training materials</a>	<p><a href="#">The MSC Trainer has gained the skills and knowledge to support member libraries and develop useful training materials and training events for the membership.</a></p> <p><a href="#">This helps MSC staff meet the LSTA Goal One objective that “the Montana Shared Catalog Trainer with the assistance of peers will develop resources and continuing education that assist libraries with day-to-day tasks thereby making them more efficient in their work.”</a></p>	<a href="#">Library directors and staff demonstrate the knowledge, skills, and desire to participate in collaborative efforts.</a>

**Upcoming or current activities:**

- [LSTA Annual Report – completed](#)
- [Release of the CE/Certification Module within ASPeN will happen in early December - completed](#)
- [Training and orientation for the new Statewide Projects Technical Support person - completed](#)
- [Review of resources for library board members – in process](#)
- [Federation reporting in ASPeN – in process](#)
- [MontanaLibrary2Go Community Assessment](#)
- [Help desk ticket system configuration – in process](#)
- [Updating library manuals – in process](#)
- [Montana Memory Project funded four new projects with \\$3500 LSTA funds – in process, Reopened application period for remaining \\$2500](#)
- [Montana Memory Project has added 8 new collections since August 2018](#)