State Librarian's Report
April and May 2015

Prepared for the June 23, 2015 Commission meeting
by Jennie Stapp, State Librarian

Goal One—Content

1. MSL acquires and manages relevant quality content that meets the needs of Montana library users.
(Originally reported October 2014) In late August, MSL was informed by the Governor's Office of Budget and Program Planning that we must reduce our FY15 Coal Severance Tax-funded expenditures by 7% or $42,000 rather than the originally projected amount of 25% or $137,000.

To address this reduced shortfall, MSL and the Office of Public Instruction agreed to split the cost of the Tutor.com service in FY15. Montana libraries will see no change in their service as a result of this decision. Additionally there will be no impact to the availability of any statewide databases.

I reported at the August Commission meeting that we were nearing completion on a revised agreement with EBSCO to extend our existing contract by an additional year, at a reduced cost, to make up for the originally planned shortfall. This amendment would have meant no loss of service for libraries and our patrons. Although that amendment is no longer necessary, and our existing databases remain in place, we sincerely appreciate EBSCO's willingness to work with us to minimize the impact of this budget uncertainty. I also want to thank the Network Advisory Council for their work to help us develop a positive resolution to this situation. I'm relieved to know that we will not have to enact such deep cuts and, at the same time, it's gratifying to know that we can turn to our partners to help us resolve situations such as these when they arise.

We are currently projecting full coal severance tax funding for the FY16/17 biennium.
(Originally reported February 2015) After months of fluctuating revenue estimates, the Office of Budget and Program Planning has now advised the State Library that FY 15 Coal Severance Tax cuts are not necessary. Because the long-term future of this funding is uncertain until the legislative session is over, staff are planning to spend this money on one-time-only expenditures. Library Information Services will hire a temporary staff person to help complete a number of unmet tasks including a needed inventory. Statewide Library Resources

is researching the purchase of eBooks through Ebsco and the option to add additional HomeworkMT sessions.

Goal Two—Access

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

(Originally reported October 2014) For the past year MSL has been migrating to a new web Content Management System (CMS). MSL had previously used the WordPress CMS managed by Pressable. While this solution was a good option for us at that time, the State Information Technology Services Division (SITSD) has since begun offering a robust CMS service on the state enterprise web platform. Utilizing the state enterprise web platform provides additional security measures and better opportunities for integration between our web resources and other IT resources. We have worked with SITSD since their initial testing of the system in October 2013, and since that time the entire library program web pages have been migrated from WordPress to the state supported CMS. We expect to move the final page, the MSL home page, by the end of October 2014. In addition to added security and efficiency, moving to SITSD's DNN environment comes at no cost while hosting of WordPress at Pressable came at a cost of $135 per month.

Goal Four—Consultation and Leadership

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

4.1. Represent the interests of MSL partners including public libraries and the GIS community in appropriate legislative, community, regional, and national forums.

   4.1.a. Present information about the importance of broadband connectivity and E-rate at the Montana Telecommunications Association (MTA) annual conference in Billings, August 5-6. The Montana Telecommunications Association represents the internet service providers for many Montana libraries. From these providers we hear that broadband infrastructure is adequate across the state but we know that libraries lack access to affordable broadband to meet basic internet needs. As we consider how to rectify these opposing viewpoints and to find solutions to the issues surrounding broadband capacity in Montana it is clear that public-private partnerships are necessary and this means engaging MTA as well as the Montana Independent Telecommunications Systems. The first step is to develop a common understanding of the issues and I hope that attendance at this conference will aid in that effort. In coordination with this conference, I will also take John Windhausen, Executive Director of the Schools, Health and Libraries Broadband Coalition, on a tour of four Montana libraries, of varying size. Librarians in Billings, Columbus, Red Lodge and Bridger will have the opportunity to education John on the challenges of providing broadband to their patrons. **(Originally reported October 2014)** As I reported at the August commission meeting, I served on panel at the Montana Telecommunications Association annual conference with John Windhausen, the Schools, Health and Libraries Broadband Coalition Executive Director and Kirk Miller, Montana School Administrators Association Director, regarding the impacts of the new

E-rate modernization order. Since that time we have learned that there is some lingering confusion regarding the changing way urban and rural status is determined under the order. Status is currently determined by county; Montana has three counties defined as urban: Cascade, Missoula and Yellowstone. Under the old system, just about every town in an urban county was considered urban. Under the new order the Federal Communications Commission defines urban and rural based on census classifications. On first look, this change seemed positive for Montana because certain communities like Belt would no longer automatically be classified as urban. However, in reading through the footnotes of the order it was noted that the order also relies on the not easily understood urban clusters concept. What it could mean is that communities with a population of 2,500 or more could be moved into an urban classification and potentially lose 10% of their E-Rate discounts. This new definition would impact approximately 30 Montana libraries that are currently classified as rural. Several organizations with which we are involved have asked for a clarification of this order which is contrary to the FCC's stated goal to get more funding to rural areas.

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

   4.5.a. Serve as a point of contact for the State on the Interconnectivity and Telecommunications Key Industry Network (KIN) under the auspices of the [Main Street Montana Project](). This KIN is one of eleven private sector steering committees that will work to address the tasks set forth in the Governor's Main Street Montana Plan that was announced earlier this spring. There is opportunity for the State Library to contribute resources and expertise to the work of a number of the KINs. Managers are scheduled to meet with MSMP Project Coordinator in early August. In particular, the Interconnectivity and Telecommunications KIN is charged with focusing on the broadband needs of Montana. Through meetings with the Project Coordinator and the State Chief Information Officer I have been tasked with serving as the State point of contact for the Project Coordinator for this particular KIN. I hope that this great opportunity will allow me to play a role in shaping how the state looks at broadband needs and any future policy, funding, and legislative initiatives that this effort may inform, to the benefit of Montana libraries.

(Originally reported December 2014) I attended the October meeting of the [Main Street Montana Interconnectivity and Telecommunications Key Industry Network]() (KIN). This committee, led by private sector telecommunications representatives, continues to evaluate the need for better broadband in the state with an eye to policy and funding recommendations that can be made to the Governor. At the October meeting the KIN heard presentations by the cities of Missoula and Bozeman regarding their municipal broadband initiatives and from the University of Montana and the State of Montana regarding their broadband networks.

(Update: June 2015) I am not certain about the current status of the KIN as the Main Street Montana Program Administrator is no longer on contract.

4.5.b. Understand and explore opportunities to improve broadband access for Montana libraries. Montana libraries continue to lag behind the nation in their ability to provide broadband access for staff and patrons. Numerous factors play into this reality that must be better understood if solutions are to be developed. Leadership opportunities are on the horizon, including the MSMP described above and national efforts to reform e-rate within the Federal Communications Commission. At this time, staff are collecting data and evaluating opportunities for partnerships and funding. Although it seems premature to propose a taskforce to address broadband needs at this time, based on the outcome of these opportunities, we need to be ready to lead.

(Originally reported December 2014) Staff, in partnership with our colleagues at the American Library Association, continue to evaluate the impact of reduced E-rate discounts on Montana libraries. Based on this evaluation we submitted an Ex Parte filing to the Federal Communications Commission (FCC) detailing the impact of some of the changes (see attached).

I communicated our concerns regarding the issue of the change in the rural designation for E-rate recipients to Senator Tester's office. Senator Tester was aware of this situation and is communicating with the Commission about the impacts to Montana. His staff appreciated receiving detailed information from the State Library to further document the concerns.

(Originally reported February 2015) At their December meeting the Federal Communications Commission (FCC) released a second order to continue their effort to modernize E-rate. This order follows the first order issued last July. Policy groups with which the State Library partners continue to study the impact of this new order which includes two key elements previously discussed by this commission: 1) The E-rate cap for funding has been increased from $2.5B to $3.9B annually making more funding available for broadband deployment, internal connectively, and service costs, and 2) the FCC reversed their decision from the previous order regarding the definitions of urban, urban cluster, and rural. Libraries must now be in communities with populations of 25,000 or more to be considered urban or urban cluster. This reconsideration is in keeping with ex parte comments we submitted to the FCC in November and will benefit the thirty libraries in Montana that briefly found themselves considered urban following the initial order.

(Originally reported December 2014) The Schools, Health and Libraries Broadband (SHLB) Coalition contracted for the creation of a report entitled *A Model for Understanding the Cost to Connect Schools and Libraries with Fiber Optics* that documents the cost for broadband deployment to different geographic regions of the country. This report was cited by FCC Chairman Wheeler in recent remarks that he made in early November in which he proposed a $1.5 billion increase in E-rate funding for fiber build-out.

At their November 20 board meeting, I was elected chair of the SHLB Board for 2015. During 2015 I will be responsible for guiding the Coalition as we seek to reach two significant milestones in operational planning to receive continued funding from the Gates Foundation.

(Update: June 2015) As Chair of the SHLB Coalition I had the opportunity to engage with SHLB members and national broadband leaders during the annual SHBL Coalition conference in Washington, DC, May 20-22. There are numerous models for deploying broadband to community anchor institutions for Montana to learn from but they all require state investment. In the coming fiscal year I plan to encourage the Governor's Office to host a broadband summit to explore these opportunities. In particular, I had the opportunity to visit with former Governor Quinn of Illinois, who chaired their broadband advisory council while he was the lieutenant governor and who as been referred to as the "broadband governor." He knows Governor Bullock and encouraged my idea regarding a summit.

(Originally reported October 2014) On September 11 I chaired the Montana Land Information Advisory Council. As was reported to the Council, the MLIA account had its lowest level of revenue collection ever (details are available online: http://docs.msl.mt.gov/Central_Services/Commission_Councils/Montana_Land_Information_Advisory_Council/Archive/2014/09/MLIA_Account_Status_20140901.pdf).   Collections seem to be increasing again but reliance on this account as the primary source of funding to support the Montana Spatial Data Infrastructure is concerning and will necessarily cause us to prioritize a strategic approach to address this funding need in the near future.

(Originally reported December 2014) On November 13 I chaired a meeting of the Montana Land Information Advisory Council. Status of available funding through the Montana Land Information Account was foremost on the Council's mind as they moved the recommended adoption of the FY '16 Land Plan. Current account status is detailed below.

(Update: June 2015) On May 28th I chaired a meeting of the Montana Land Information Advisory Council. The council responded very positively to the Montana Spatial Data Infrastructure Work Plan which will be presented to the Commission in August. The issues identified in the plan resonated with the council, and, though this council will turn over at the end of June, they voiced commitment to begin to address those of immediate priority. In particular, the council is committed to identifying creative opportunities to address the MLIA funding challenges. We will initiate a process to evaluate funding opportunities in a meeting with MACo Executive Director Harold Blattie.

(Originally reported December 2014) At the end of October I had the privilege to visit libraries in Glendive, Wibaux, Circle, Terry, Broadus, Miles City and Ekalaka prior to attending the Sage Brush Federation meetings. As the State Library looks for opportunities to find ways to bring innovation to Montana libraries, this trip reminded me of the importance of continued support for day-to-day library operations. Challenges that these libraries face include managing personnel, cataloging, building maintenance, director/board relations and maintaining a web presence.

(Originally Reported April 2015) Over the legislative transmittal break I visited the James E. Shanley Tribal Library (which now serves as the Poplar branch of the Roosevelt County Library), the Sheridan County Library in Plentywood, the Froid and Culbertson Branches of the Roosevelt County Library, the Hobson Community Library, and the Judith Basin County Free

Public Library in Stanford. In particular, these libraries noted the importance of the State Library consulting services that we provide, particularly given some new staff serving those libraries.

(Update: June 2015) I was honored to be one of several invited guests and ribbon cutters at the new Montana City Branch of the North Jefferson County Library District on May 12. It has long been a goal of this district to provide a branch in Montana City. It is well located near key businesses, a bus stop and a large housing subdivision. The opening was well attended and citizens spoke enthusiastically about having a local library.

With the help of Stu Kirkpatrick I have created a storymap using ArcGIS Online to document my visits to Montana libraries:
http://montana.maps.arcgis.com/apps/MapJournal/index.html?appid=cd0af8465e5f4437b5b8b0aac00150bb.

Goal Five—Collaboration

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

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

    5.1.a. In collaboration with the Montana Library Association (MLA) Government Affairs liaison, I will seek to better integrate the Montana Library Association Board of Trustees interest group with the government affairs committee. The interest group has been inactive for a number of years. Recently a board member expressed interest in playing a more active role to engage the Montana Association of Counties (MACo). There is also a need to add capacity to the government affairs committee to support statewide legislative activities. In late August, MLA and the State Library will host a meeting of the two groups to discuss how the interest group can better support the activities of the government affairs committee. Opportunities include assisting with the planning and hosting of the Library Legislative Night and hosting a reception at the annual MACo meeting. Given the upcoming legislative session we will suggest that the interest group focus on the Legislative Night and other opportunities to support the MLA legislative agenda.

MLA and the Board of Trustees interest group are essential stakeholders of the State Library. They have long been strong supporters of the State Library's legislative goals. The interest group is an underutilized resource that seems to lack purpose and the Government Affairs committee lacks capacity. Efforts to bring these groups together seem like an opportunity for both groups to maximize their capacity to realize specific goals to support libraries through their interactions with state and local officials.

(Originally reported October 2014) Along with key staff I attended the National States Geographic Information Council (NSGIC) meeting in Charleston, South Carolina. During the

state caucus there was good discussion about a forthcoming federal National Geospatial Act which will prioritize geospatial work at the federal level. Based on experience in several states, as was shared with the Commission during the August CATSPAW presentation, it is clear to NSGIC that the act should call for greater support of GIS activities at the state and local level. NSGIC will prepare an educational campaign which will become the focus for state and national legislative efforts in the coming year. This legislation will likely be introduced to Congress in the late winter or early spring.

(Originally reported February 2015) During the third week of October I attended the annual meeting of the Chief Officers of State Library Agencies (COSLA) in Jackson Hole, WY. The agenda included an Previously reported on the recently released [Aspen Institute report on public libraries](#) which I hope the Commission will be able to review in more detail at their April Commission meeting. Other information of importance shared at the meeting included:

- a reminder that the federal budget continuing resolution expires in December and may need to be renewed if the FY 15 budget is not announced;
- Previously reporteds on a variety of different national continuing education initiatives including COSLA's CE Connector grant; and
- an overview of different statewide strategies for delivering broadband to schools and libraries outlined in [COSLA's Planning Guide for Library Broadband Connectivity](#).

Of note, this was the last COSLA meeting for outgoing director of the Institute for Museum and Library Services. In January Susan Hildreth will complete her term as director. She will be replaced by someone representing the museum community as is the practice of IMLS. Maura Marx, IMLS Deputy Director for Libraries will serve as interim director until a new director is confirmed.

(Originally reported February 2015) According to statute the State Librarian is a permanent member of the Electronic Government Advisory Council described in [2-17-1105, MCA](#). Following a recent task force review of the role of this council, the Council, at their November 13 meeting, voted to support legislation that would abolish the committee and transfer the duties of the Council to the Information Technology Board which also advises the State Information Technology Services Division and on which I also have a seat. This Council played an important role a decade ago when the State was first exploring e-government solutions but, now that services are well managed through a state contract with Montana Interactive, regularly advisory council meetings seem unnecessary. I believe this is a positive change that will result in a more efficient use of state resources.

Goal Six—Sustainable Success

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

6.1. Achieve and maintain funding at a level commensurate with MSL's mission.
(Originally reported February 2015) On January 16, we received official notice from the Institute of Museum and Library Services that we will receive level Library Services and

Technology Act funding for FY 15. Our official award amount is $1,059,140. Staff are currently preparing recommendations for how to expend those funds. These recommendations will be shared at the March Network Advisory Council meeting and with the Commission for action at your April meeting.

(Originally reported February 2015) Montana Land Information Account collections remain historically low with monthly collections still averaging below $60,000 for the first six months of the fiscal year. However collections for the last two months were slightly higher than the same period a year ago creating optimism for a brighter spring.

(Originally reported October 2014) Our longtime partner, the Natural Resources Conservation Service, continues to feel the impact of sequestration. For nearly two decades the State Library and the NRCS have had an agreement in place that provides infrastructure and professional GIS services to NRCS employee, Cathy Maynard. Because of budget reductions the NRCS and the State Library renewed the agreement for a bare minimum of support for the coming federal fiscal year with the understanding that the amount of funding the agreement makes available will increase as their funding situation improves. The renewed agreement allows Cathy to keep her office space and information technology infrastructure but allows for only a minimal amount of professional support. Although this reduction in funding puts added pressure on the State Library we are pleased that the NRCS recognizes the value they receive from this partnership and chose to continue to sustain it, albeit at a reduced amount, in the face of budget cuts.

(Update: June 2015) Collaborating together, Allan Cox, Evan Hammer and I have begun to update the MTNHP Contract for the FY16/17 biennium. The funding amount will remain $878,226 for the biennium. Primary contract updates reflect changes in the nature of IT services and support due to IT advances both by MSL and SITSD.

(Originally reported February 2015) As noted in your financial report, the State Library signed an agreement with the Natural Resources Conservation Service to continue our in-house partnership. The $16,000 agreement is about half the amount of normal agreements; a reflection of the continued effects of sequestration on our federal partners. Initially the NRCS was going to forgo an agreement altogether but staff was able to demonstrate the significant benefits of our partnership and financial savings to the NRCS as a result of our arrangement. Though the current year's agreement only covers operating costs, the NRCS has voiced a desire to restore funding next fiscal year as funding allows. This added funding is necessary to provide our in-house partner, Cathy Maynard, with professional GIS support.

6.1.a. MSL managers will spend a significant portion of FY15 preparing for, monitoring and participating in the 2015 legislative session. In addition to supporting and directing staff through various legislative related projects (see MSL work plan) I will:
- Meet regularly with the MLA Government affairs representative to inform the MLA legislative agenda.

- Monitor bill drafts to watch for issues that may impact the State Library and/or the communities we serve. As necessary I will communicate relevant information to appropriate stakeholders and/or will prepare and present necessary testimony.
- Based on May 23 action from the State Library Commission, MSL submitted EPP requests to the Governor's Office of Budget and Program Planning. We continue to communicate with Governor's policy advisors and constituents to see support for these proposals. Further direction from OBPP regarding our requests is anticipated in August.
- As we near the legislative session we will prepare budget testimony and handouts and will identify persons who will testify on behalf of the State Library in support of MSL's budget requests.
- MSL is not carrying and legislation this session but will respond to bills as appropriate.

The legislative session is the most important period of the biennium for the State Library as it is one of the few opportunities we have to propose and receive funding for new services. Careful consideration and planning goes into preparing our EPP requests and submitting them to the budget office. Articulate messages and talking points regarding the importance of our budget requests are drafted and shared with stakeholders and will ultimately be formulated into testimony that will be shared during the session. Because of the potential for statutory changes, both positive and negative, that come about during the session, we also dedicate a significant amount of time to monitoring and understanding a wide variety of bills. This work often involves gathering data, drafting analyses, sharing information with a variety of stakeholders including the legislature. A successful legislative session will result in several funded budget request and no harm done though legislative change.
(Reporting documented in Executive Planning Process and Legislative updates presented at October, December and February Commission meetings).
(Originally reported February 2015) In collaboration with the Montana Library Association, the State Library hosted the biannual Legislative Night at the State Library. It was attended by a record 101 Legislators, the Governor (a first), the Secretary of State, and the Superintendent of Public Instructions as well as numerous librarians, library patrons, and representatives from the Montana Association of Geographic Information Professional and the Montana Association for the Blind. We were told numerous times that Library Legislative Night is a "must attend" event of the session. Due in large part to holding the entire event downstairs, rather than spread through the building, staff reported significantly more and higher quality interaction with attendees.

6.1.b. Session permitting, attend National Library Legislative Day May 4-5, 2015 in Washington, D.C.;

Library Legislative Day is an opportunity to learn more about the American Library Association legislative priorities and to meet with members of our Congressional delegation to express to them the importance of Montana libraries and their need for ongoing federal support through Library Services Technology Act funds and other federal initiatives.

(Update: June 2015) I attended NLLD along with four other representatives from Montana, Anne Kish, Matt Beckstrom of the Lewis & Clark Library, Ann Ewbank from the MSU Dept. of Education and Dawn Kingstad, Glendive Public Library Director and MLA president. We had great visits with congressional staff and we were able to meet personally with Senators Tester and Daines at the Wednesday coffee hour. Tester is a strong support of libraries and LSTA funding. We were able to find points of common support on issues of privacy as they relate to the USA Freedom Act which modifies the PATRIOT Act. Daines is a co-sponsor of this legislation.

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

6.6.a. In anticipation of staff changes with the Digital Library including staff retirements, I will work with program managers to evaluate the current organizational structure of the Digital Library. I continue to look for opportunities for staff to develop leadership skills and to provide a more integrated services approach for the Digital Library. Staff turnover is an opportunity to evaluate how we might make the most of staff skills and existing resources to meet the goals identified in program work plans and to ease the transition that comes with staff changes.

(Originally reported October 2014) As I reported in August, MSL intends to contract with a business analyst who will be asked to evaluate and to make recommendations about how we can optimize our organizational structure.   The goal of this review is to have an outside professional review the business priorities and workflows of the Library to develop recommendations that can be part of our management toolkit as we work to proactively plan for the future of the Library. We have no preconceived ideas about what any recommendations might be nor will we guarantee that we will implement any recommendations that may come to us, but, we do expect that a consultant will give us examples of organizational models that would build on the strength of the Library and create opportunities for increased collaboration within the agency to better meet our statutory obligations and to serve our partners.

The process for the review will largely be determined by the consultant and will undoubtedly include discussions with staff and Commissioners. We do not yet have a firm timeline. We have issued a limited solicitation to begin the process to select a consultant. Responses to that solicitation are due October 3rd. Once a consultant is selected, we will know more about the details of the review process and timeline.

(Originally reported December 2014) The State Library has contracted with Nedra Chandler and Scott Graber of Triangle Associates to complete an organizational review of the State Library. Nedra was selected through a limited solicitation procurement and came recommended by the Lewis and Clark Public Library. The goal of this review is to have an outside professional review the business priorities and workflows of the Library to develop recommendations that can be part of our management toolkit as we work to proactively plan for the future of the Library.

The process for the review is being largely be determined by Nedra and Scott. To date Nedra has met three times with the senior management team and individually with 16 staff and Commissioner Bartow. Based on these interviews, Nedra and Scott will deliver a planned approach to completing the review and making their recommendations. This plan is due to State Library staff by the end of December. Known next steps include attendance at the December 17 all staff meeting and a planned introduction to the Commission at the February Commission meeting.

(Originally reported February 2015) As the Commission is aware, the State Library has contracted with Nedra Chandler and Scott Graber of Triangle Associates to complete an organizational review of the State Library. The goal of this review is to have an outside professional review the business priorities and workflows of the Library to develop recommendations that can be part of our management toolkit as we work to proactively plan for the future of the Library.

The process for the review is being largely be determined by Nedra and Scott. Each have met with managers and staff on a number of occasions. Nedra shared the results of the initial interviews at an all staff meeting on December 17. Following that meeting staff had an opportunity to respond to a survey which asked for feedback about the themes. Additionally Scott is working with the program managers of the Digital Library Division to utilize a process known as value stream mapping to evaluate the various reference request processes used by the Division to look for opportunities for further collaboration. More detail about the organizational review will be shared by Nedra during February 11 meeting.

(Originally Reported April 2015) The Digital Library Division program managers have completed a value-stream mapping process to review how the programs manage reference requests. As a part of this review, the managers identified that the current siloed approach means that subject matter experts may be called upon to answer general requests resulting in inefficient use of staff resources. Additionally, the current processes mean that users likely do not benefit from cross program expertise and resources and there is no feedback loop to maximize resources including web delivery of information and services. With these opportunities in mind, program managers are currently evaluating how a focus on integrated public services including reference management, training and outreach might improve patron outcomes and allow for more efficient management of Digital Library resources.

With additional funds available in our contract with Triangle Associates, the Statewide Library Resources Division plans to undertake a similar process review (the process will be identified in April).

(Update: June 2015) Based on the value-stream mapping work conducted with Scott, the State Library is proposing a reorganization of the Digital Library Division (See the Org Chart and Charter below). The reorganized structure would not focus on information types as the basis for organization structure but rather, is organized by work focuses including Public Services, Information Management and Information Products. The Commission is asked to

discuss the proposed reorganization at their June meeting. Action will be requested in August to approve the reorganization.

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

    6.7.a. Direct and provide guidance to program managers on and evaluation of program work plans and a new performance objective process that empowers and engages staff and that support the goals of the long-range plan. In FY 2014, with advice from the Department of Administration, the State Library adopted new performance appraisal documents. These documents were shared with staff at the April all-staff meeting. Central to the documents are staff-developed performance objectives. Supervisors and staff understand that program work plans should be developed with significant staff input and should then drive individual performance objectives so that employees can directly see how their performance ties to program work plans and the overall agency long-term plan.

(Originally Reported April 2015) For the past six months managers have been working with staff to implement our new performance appraisal process which ties individual performance measures to program work plans that are reviewed by the Commission each August. Performance objectives are in place for most staff and regular performance appraisals are being conducted. Job profiles are also being reviewed on an annual basis. A process has also been put in place to monitor the performance appraisal process agency-wide to ensure consistent application. Staff report seeing the value in tying individual performance objectives to program work plans to demonstrate direct impact on library strategic goals and, through our reporting we are also beginning to get a better sense of the need to prioritize our work plan goals within existing resources.

(Originally reported October 2014) FY14 equipment funding was prioritized to bolster the machines that host our virtual server environment and to increase the storage capacity of our storage area network (SAN). In order to move our final remaining physical servers to virtual servers we needed to purchase one additional host server, and add memory and processors to three existing host servers. That hardware was purchased at the end of FY14. It has all been received, installed, and the new hardware is up and running. We expect to have five of the eight remaining physical servers migrated to virtual servers by the end of calendar year 2014.

We also purchased hard drives to further expand the storage capacity of our SAN environment. Previous purchases had expanded the SAN to 40TB. In FY14 we purchased drives to fill out the remaining enclosures and increase the capacity to 60TB. We are currently using about half of the existing capacity. The expanded capacity should be sufficient to meet MSL needs for the next couple of years, but we will need to explore longer term storage needs for MSL to understand whether the best approach for expansion after that is to continue to expand on our existing hardware, consider purchasing new or replacement hardware, use hosted storage options from SITSD, or use hosted hardware services from cloud providers. The answer is likely a combination of many of these options but we need to better understand MSL program needs to come up with the best solution for the library.

(Originally reported October 2014) Also included with the State Librarian's report is the results for the State Library Work Force Pay Equity audit which was conducted as part of the larger audit for the Governor's Task Force on Pay Equity. Overall the results demonstrate relative pay equity within the agency which can be attributed to our use of the Broadband Pay Plan. However, differences in salaries for traditional library positions and IT positions continue to make it difficult for the State Library to maintain true pay equity across the agency. The question of how to address this concern has been raised with the Task Force as an issue that requires further study.

(Originally reported December 2014) The Montana State Library has benefitted from the generous bequest of Robert Moran, longtime librarian at the Red Lodge Carnegie Library who passed away in late 2013. During his years of service, Mr. Moran came to know and appreciate the services of the State Library and stipulated in his will that we receive $5,000 from his estate. This donation has been received and deposited in the State Library Trust.

(Originally reported December 2014) Montana Land Information Act collections remain historically low. As a result, the FY'16 Land Plan budget recommends a reduction of $200,000 from FY'15. Though the amount projected below is approximately $14,000 less than the proposed budget staff believe this amount will be made up in underspending in both grants and operations.

Introduction

The staff of the Montana State Digital Library manages the information collections of the Montana State Library in accordance with Montana statute and the library collection development policy approved by the State Library Commission. In doing so, we work with our users to ensure that the information managed by the State Library addresses the information needs of our users. The staff also uses that information to respond to reference requests. Staff develops tools and online information resources to provide self-serve access to much of this information. We offer training and education to help our users become familiar with the resources that we make available. We continually look for opportunities to more effectively meet our statutory mandates and to improve quality of information and services that we provide.

Though users seem to be generally satisfied with the information they receive from the Digital Library and some recent advances, such as the addition of the GIS Data List and the Montana Field Guide to DiscoverIt, created some opportunities for program integration, staff workflows within the three programs of the Digital Library, Library Information Services, Geographic Information, and the Natural Heritage Program, remain in silos. Information management systems used to manage reference requests are ad hoc or are aging and losing functionality. The systems are not coordinated across programs of the Digital Library group. There is an inequitable distribution of the number of information requests received. There is no consistently used IT solution for tracking requests, and therefore no reliable way to understand the nature of prior user requests and to look for possible ways to improve user experience across the division. There is no division level feedback loop to drive changes to web sites, applications, collection development, and other patron focused value added tools and training opportunities. Specific audiences from individual programs receive the majority of our attention, while little effort is put into addressing the information needs of general State Library users who may benefit from information from more than one program.

To address these concerns and to ultimately create a future-focused, user driven Montana State Digital Library, the State Librarian and Digital Library Managers propose a reorganized Digital Library. The proposal focuses on program functions and allows for cross-functional teams that address priorities of the Digital Library as determined by a single Digital Library Administrator and lead staff.   Program functions include Information Management, Information Products Administration, and User Services (see below).

Definitions

Information Management – is the creation, collection and organization, including the planning, structure and organization, controlling, processing, evaluating and reporting of information activities, of information from one or more sources.   Examples of information managed by the Digital library includes state publications and federal documents, the professional library development collection, the Montana Spatial Data Infrastructure, water and natural resources information. Staff include GIS Analysts, a Librarian and a Library Tech.

Information Products Administration – is the development, administration, evaluation and improvement of a broad set of processes and tools that ensures the Library has the ability to collect, store and access and distribute all information within our collection and that users have the ability to discover and use the information to meet their information needs. Examples of information products include the Digital Library website, online web applications, web services, and licensed online databases. The Water Information System and the Natural Resource Information System can be thought of us information products that deliver information to our users. Numerous processes are necessary to ensure the effective use of these products both by staff and users. Processes include metadata coordination, web and application development, user authentication administration, etc. Staff includes GIS Analysts and a systems programmer.

User Services – is the direct interaction with users in the forms of request fulfillment, reference request management, training, marketing, etc. Through direct user interaction, User Services staff evaluate users' needs and the availability of information and the tools that make that information available to determine how effectively the Digital Library responds to user needs. Staff includes a Librarian, Library Techs and GIS Analysts.

Cross functional teams - staff identified from the different functional areas of the Digital Library to work together to address prioritized responses to users' needs.   Work involves anticipating, analyzing and interpreting user needs and issues that might impact priorities of the Digital Library. Current work groups should be managed by cross functional teams.

Digital Library Team Reorganization	Project Charter

Project sponsor: *Jennie Stapp*
Project team: *Allan Cox, Stu Kirkpatrick, Jim Kammerer, and MSDL staff as necessary*
Project manager: *Evan Hammer*

Current State Problems and Business Needs:
The three programs of the Digital Library, Library Information Services, Geographic Information, and the Natural Heritage Program, are currently siloed. Each of these programs has an information collection or creation component; each program takes advantage of technology tools to make information accessible to patrons; and each program commits staff time to direct engagement and support of patrons. Some of the systems used to manage reference requests are ad hoc, and none are coordinated across programs of the Digital Library. There is a lack of consistency, cross training, and definition of cross program user needs. Little effort is made to find and share information from each program with users to the detriment of our users. There is no consistently used IT solution for tracking requests, resulting in limited ways to understand the nature of prior user requests and to look for ways to improve user experience. There is no division level feedback loop to prioritize and drive changes to web sites, applications, collection development, and other patron focused value added tools and training opportunities. Staff finds that it can be difficult to route general requests for users who don't know the specific program from which they want information. There is often an inefficient distribution of requests, resulting in issues with requests sometimes not being reviewed in a timely manner. All staff are expected to be both specialists and generalists, developing specific skills for data collection and management while also needing broader understanding of available resources to assist patrons in need.

Measurable Target Condition: (Think about how these will be measured)
More consistent and efficient handling of requests and ability to track them;
Increased patron familiarity and satisfaction with services, and increased use of MSL services over time;
Increased patron driven acquisition and collections that better reflect user needs;
Greater ability for staff to focus on their work with fewer interruptions;
Increased staff autonomy and responsibility, opportunities to learn lead/management techniques;
Improved coordination across program areas;
Less program focus and more emphasis placed on user needs;
Improved ability to manage changes in budget and FTE driven from the Legislature.

Proposed Project Scope:
Reorganize the Digital Library to focus on program functions and that allows for cross-functional teams that address priorities of the Digital Library as determined by a single Digital Library Administrator and lead staff. Program functions include Information Management, User Services and Information Products Administration (see attached org chart and definitions).

Deliverables:
Implementation of a new organizational structure for the Digital Library, including a defined information request management process.

Dependencies:
- *Staff Input;*
- *State Library Commission approval.*

Constraints
- *Staff Time: at this time no additional FTE is planned and we need to absorb the loss of 1 FTE resulting from legislative session;*
- *Any process changes cannot degrade statutory responsibilities;*
- *Budgetary constraints: No additional funding is available to make this change happen.*

Risks
- *Alienation of Patrons;*
- *Increased workload for staff (long term) or other negative staff impacts;.*
- *Degraded communication among staff, confusion about roles and/or reporting structure;*
- *Worse service.*

Metrics
- *Number of Information requests;*
- *Staff time available for handling requests;*
- *Non-staff resources available for request handling;*
- *Patron satisfaction (via survey);*
- *Staff satisfaction (through annual reviews and surveys).*

Anticipated Benefits for Patrons and Organization
- *Reduce request response times (based on request type);*
- *Reduce the number of unnecessary forwarded/redirected requests;*
- *Improve the quality of responses to requests;*
- *More efficient use of staff and technical resources;*
- *Customers are better able to help themselves to content without direct assistance;*
- *Focus on metrics, leading to improved agency records management, reporting and retention (accountability);*
- *Increased diversity in staff workloads (some will see this as a benefit);*
- *Reduce a backlog of requests and keep it from re-occurring.*

User Story:
As a library patron, I don't want to have to know how the Library is structured in order to access the information that is there. When I request assistance or information about a topic I expect to receive a comprehensive response to that request that includes resources available from any applicable Library program, not just those which I know to ask about. The library should be a well-run organization that maximizes the use of staff resources and technology solutions to provide efficient, effective access to high quality information.

Digital Library Administrator
1 FTE
- Senior Mgr
- Program Admin
- Supervision
- MTNHP Contract Admin **

Users Services
4.75 FTE (two leads)
Librarian
Library Techs
GIS Analysts

- Reference
- GIS Coordination/Grant Mgmt
- ILL
- Reading Room Admin.
- Conference Room Admin.
- Circulation
- Training
- Programming
- Marketing

- Professional Library Development

Information Management
6.5 FTE (3 leads)
GIS Analysts
Librarian
Library Tech

- Government Information

- Geographic Information

- Water & Natural Resource Information

Information Products
3.5 FTE (1 lead)
GIS Analysts
Systems Programmer

- Metadata coordination
- User access
  - Web
  - Apps
- Archiving /Records Mgmt

** Integration of MTNHP workflow & services that align with these program areas will be evaluated during contract negotiations