

Draft

MSC Biz Plan Update

Montana Shared Catalog
Business Plan Update, January 2005
Reviewed, modified and approved by the MSC Executive Committee
For more information, contact Bruce Newell, MLN Director bnewell@mt.gov

The existing Montana Shared Catalog (MSC) business plan was submitted to the Networking Task Force (NTF) in September 2003, to the MSC membership in November, and to the MSL Commission in December 2003 (where it was accepted). This plan can be viewed at <http://montanalibraries.org/MSC/MSCBusinessPlan.doc>.

The executive summary abstracted the plan, and included recommendations from the NTF, the MSC membership, and the MSL Commission. These recommendations follow, *with a status report for each in italics*.

Governance—

1. The NTF recommended that the MSC remain a project of the MLN, but that the MSC gradually move toward self-governance (but not necessarily fiscal independence). *The MSC has remained a project of Montana Library Network (MLN), and progress has been made toward increasing the role of the MSC Executive Committee. For instance, this report was reviewed, modified, and approved by the Executive Committee.*
2. Review and update the Members Contract. *The contract was reviewed and modified by a committee led by Bridgett Johnson. The current Contract may be viewed on the MLN home Web site:*
<http://montanalibraries.org/MSC/MLNmsc-home.htm>
3. Review the functions of the Executive Committee and Work Groups. *Work groups have taken an increasing role in working out the operational details of the MSC. The Cataloging, Training, and Partner work groups, in particular, work with the MLN's participation but are self-directed.*
4. Examine the relationship between the Montana Library Network, the Montana State Library, and the Montana Shared Catalog, exploring the question: "Is the MSC an independent consortium or a project of the Montana State Library (MSL)?" *This is as much a question for the MSC membership and the MSL Commission as any, and this will likely be an ongoing discussion. From the perspective of the MLN, the MSC is self-governing and doing fine, financially. But it is also a significant investment and a notable success as a MSL library development project. To the extent that MSL's participation is necessary for the ongoing operation of the catalog and the consortium's ongoing role in library development, the MSL retains a significant financial interest and responsibility for this project.*

5. Investigate possible alternative governance mechanisms, such as inter-local agreements and Multi-jurisdictional Service Districts in Montana law (MCA 7-11-101 etc.) *This has not been done; perhaps the time to consider alternative governance structures is not yet here.*

Finances—

1. The NTF recommended that MSL remain involved in running and funding growth of the MSC for the next three years (FY04—FY06). Specifically:
 - a. That MSL and MLN continue to provide staff for this project. (Approx. \$100,000 FY03) *MSL and MLN have provided staff for the MSC.*
 - b. MLN continues to fund annual server costs. (\$23,000 FY03, \$40,000 FY04) *MSL provided \$35,000 in server cost support in state fiscal year 2005.*
 - c. MSL continues to assist libraries with the up-front costs associated with joining the MSC. (Expenditures ranged between \$90,000—\$170,000 from FY01—FY03) *The MSL Commission supported new libraries to the approximate amount of \$120,000 in state fiscal year 2005 by using Library Services and Technology Act (LSTA funds).*
 - d. The MSC moves toward increasing (but not absolute) fiscal autonomy. *With 26 new members in fall 2004, the MSC has increased its financial base. All operational expenses, save personnel, come from member libraries. The MSL continues to pay the salary of Sarah, Mike, and Bruce. A new position jointly funded between the MSC and MSL has been proposed. This new position would be primarily responsible for much of the tasks involved in adding new libraries to the MSC, and assisting with ongoing support, troubleshooting, and enhancement activities. As of late fall 2004, the MSL hosts the MSC servers.*
 - e. That during FY06 the MSL Commission reevaluates the level of its financial support of the MSC for the FY07 budget year. *The MSL Commission will in effect review their support for the MSC at their February 2005 meeting, in the form of allocating LSTA funds to this portion of the MLN budget.*
2. MSL continue its present practice of *not* supporting or subsidizing libraries with their individual annual MSC-related costs. *This was our practice in state fiscal year 2005, and is our intended practice in FY06.*
3. Explore means of sharing extraordinary costs beyond what's covered by existing contingency funds. *Contingency funds have been used to aid in several unexpected costs.*
4. Investigate alternative or additional sources of funding. *This has not been done.*

Technology—

1. The NTF recommended that MSC proceed with its plans to improve server stability and access. Other (non-NTF) recommendations directed the MSC to:
 - a. Investigate, choose, and implement a server-hosting alternative by July 1, 2004. *This was completed and online in December 2004.*
 - b. Budget \$40,000 for server services for FY05. *\$35,000 was budgeted and expended in state fiscal year 2005.*
 - c. Monitor member libraries' data communications environments, seeking opportunities to improve reliability, speed, and cost. *We continue, with our*

library development colleagues, to seek opportunities to improve data communications between Internet Service Providers and our member libraries. By in large, our efforts have little effect. Fortunately, most MSC member libraries enjoy adequate data communications services.

Training—

1. Formulate an annual training plan and schedule, incorporating both start-up and ongoing training needs and an annual budget. *The Training committee, with Sarah's involvement, has taken this in hand. Jennie Stapp, from the Historical Society, is doing a wonderful job.*
2. Continue to use MSC member-instructors as well as instructors from Sirsi and other Sirsi libraries. *Peer training was a signal success this last year. We will continue this practice.*
3. Seek other Sirsi libraries as training partners. *This has not been done.*

Staffing—

1. Develop a staffing plan, identifying needs for and the costs of an additional information technology staff person and a floating cataloger/technical services librarian. *This has been done, and the proposal is before the MSL Commission in February 2005. The MSC has approved this expenditure from consortium funds.*
2. Identify sources of additional and stable ongoing funding. *This has not been done.*
3. Work with the MSL to identify MSL Library Development consultants' role or roles in the MSC. *Initial discussions have occurred, but this is still very much an unresolved topic. Our late-January 2005 joint Networking Task Force and Library Development planning meeting may shed some light on this topic.*
4. Communicate staffing needs with the State Library, and, if possible and appropriate, develop a mutual or complementary support strategy. *Initial discussions have occurred about this, but no formal plan has been developed and no training has occurred. Some of the documentation to support an effort of this sort has been drafted.*
5. Develop staffing strategies that have minimum adverse effect on other MSL missions, and support MSL and MLN's mission and goals. *We enjoy closer relationships with other MSL data processing staff. As this is being written, Mike Price is upgrading the MSL's storage area network (SAN) in cooperation and collaboration with other MSL and Fish, Wildlife, and Parks (FWP) staff. MSC is paying for this upgrade; the upgrade is occasioned by the MSC but benefits MSL and FWP network services as well.*

Growth—

1. The NTF recommended that MLN continue to invite Montana libraries to join the consortium until all who wish to join are on-board. *With the MSL Commission's support, we are going forward with this as the plan.*
2. Toward building the consortium, and toward fiscal stability, MLN was directed to discuss MSC membership with larger Montana libraries in addition to smaller public libraries. *This was implemented, successfully, last year. Twenty-five smaller libraries*

joined, and one large library (although the numbers could also be one large library, and twenty-one smaller libraries; the large library joining, Bozeman Public Library, joined as the BridgerNet consortium.)

3. The NTF, in the interest of economy and effectiveness, suggested MSL limit shared catalog project funding exclusively to the MSC. *This was implemented in state fiscal year 2005.*
4. Other (non-NTF) recommendations directed the MSC to:
 - a. Continue to fund and welcome new libraries, pursuing sustainable, prudent growth. Add libraries as quickly as resources allow, but no more so, remembering the needs of existing as well as new MSC libraries. *The MSC has operated with this as a guided principle.*
 - b. The MSC recommends that the Montana State Library continue to budget LSTA and general funds to assist with both start-up costs and ongoing expenses. *The MSL has continued to support the MSC.*
 - c. System requirements planning (for adding additional computing or data communications resources, or for upgrading the current system) should be made two-years out in anticipation of need. *Our current planning is out five years.*
 - d. Staff requirements planning should be completed two-years out in anticipation of need. Sources of funding should be identified, as well as a job description. *We have a multi-year staffing plan, with very general job descriptions. We have a draft of the job description for the staff member we are requesting being added in calendar year 2005.*
 - e. To improve the overall quality of records being incorporated into the catalog, the process of adding new libraries should be slowed from the four—six months, to six—eight months. *This was done in state fiscal year 2005. While successful in '05, we are slowing the process even further (in anticipation of the difficulty of working with several dozen libraries in the summer, and in the MSC / MSL hiring a new MSC support staff position. To the extent MLN staff resources are available, libraries with their own funds and with no data to migrate may come aboard immediately, either in small groups or as a single addition.*
 - f. Every effort must be made to communicate the consortia-nature of the MSC, making every effort to sustain and enhance MSC members' cooperative attitudes and behaviors. *This continues to be a challenge, but the training and work groups continue to exert a salubrious effect. The new MSC libraries are a good group, and by in large are successfully acculturating themselves to the consortium. They are welcome additions and good new partners.*

**WARM PRAISE FOR MIKE AND SARAH
FROM MSC MEMBERS
ON THE OCCASION OF MOVING TO THE STORAGE AREA NETWORK JANUARY
2005**



[To Sarah]

Thank you for coming to visit us! We sure do appreciate all the help you've given us (and will continue to give us!) Here is the picture from your visit.

Talk to you later,
Kathy & Michelle, Madison Valley Public Library

Very cool beans on the reports! You people at the MSL are just so great. I can't believe the transition went so smoothly - even with having to pull an all-nighter (frankly, I can't remember the last time I did that!)

Suzanne Goodman, Park High School Library (Livingston)

To all who are working so hard on the MSC:

I have been reading all the emails with great interest and I must send a big thank you to all, specifically the staff at the State Library, especially Mike, Sarah and Bruce. We may not express this often enough, but you are wonderful and so appreciated. I love this system and feel privileged to be a part of such a great group of people! I have always loved my profession, and you make me proud to be a librarian!

Beth Chestnut, Thompson Falls Public Schools

... Kudos' to Mike on his overnighter, we didn't miss a single beat and the reports seem to have been produced in record time!

Thanks,

Eric Halverson, Big Horn County Public Library

You guys amaze me! I really appreciate you trouble shooting for us so that we don't have to stay up all night.

We love you!

Louise Schlegel, KWH Elem. Library