

Memo

To: State Library Commission
From: Darlene Staffeldt
Date: 12/19/2007
Re: LSTA 2005 Budget

We have received the official notification :

"Institute of Museum and Library Services Awards \$949,157
to Support Library Service in Montana

Washington, DC—Dr. Robert Martin, Director of the federal Institute of Museum and Library Services (IMLS), announced grants totaling over \$160 million to state library agencies. “Libraries help connect us to our communities and to each other. They address our many information needs and encourage us to be lifelong learners,” said Director Martin. “These grants play an important role in building the capacity of libraries to help communities address their changing educational, economic, and social needs.”

The grants are awarded under the Library Services and Technology Act (LSTA) and are made to each State according to a population-based formula; the State’s library agency administers the funds. Montana will receive \$949,157. States provide at least \$1.00 for every \$2.00 of federal support.

IMLS Library Services and Technology Act funds help state library agencies make library resources and services, which can be prohibitively expensive to the individual, readily available to an entire community."

MSL staff has been busy preparing budget recommendations to present to the Commission. We are recommending the following budget based on the following criteria:

- The proven statewide impact of each project;
- Staff resources available for project management;
- Sustaining worthwhile current projects;
- The priority of issues given by the library community during the long-range planning process.

Project	\$\$\$\$\$\$		Balance
Balance	949,157		949,157
TBL & LDD & Admin	350,884		598,273
Technology Consultants	111,750		486,523
Montana Library Network	127,460		359,063
Marketing	20,000		339,063
Montana Shared Catalog	158,309		180,754
Childrens	1,000	1,500*	179,754
FY05 Summer Institute	20,000	10,000**	159,754
FY06 Summer Institute	5,000		154,754
Networking Task Force	4,500		150,254
Fall Workshop	10,000		140,254
Trustee Training	12,000		128,254
OCLC Group Catalog	60,059		68,195

Brief summary of the programs/proposals that we are requesting monies for:

State Library Operations in the Talking Book Program (TBL), Library Development (LDD), and Administration (Admin) represents mostly salaries for TBL and LDD, a little operational monies for these positions, and the statewide cost allocation plan (indirect costs) payment.

Technology Consultants is the salaries, operating expenses for our two remote site consultants. They along with the Helena based consultant were considered as either the number one priority or the second highest priority when we did straw votes around the state at federation meetings, and when Himmel and Wilson did the evaluation of the State Library services in 2002.

The **Montana Library Network** helps Montana libraries work together. Working as good neighbors, Montana libraries make certain that all Montanans have access to quality library materials and services. MLN core services include:

- Helping Montana libraries plan to work together
- Building and maintaining a Web accessible catalog of all Montana libraries' items (books, magazines, films, recordings, etc.)
- Helping libraries share materials with one-another, delivering the world's libraries' resources to all Montana library users
- Coordinating statewide access to 5,500+ full-text online magazines

- Facilitating access to cataloging and resource sharing tools from OCLC, a worldwide library cooperative
- Building and operating the growing Montana Shared Catalog, currently used by 56 libraries, 306 librarians, and 375,000 library clients from 36 Montana communities
- Ensuring convenient but secure user access to online resources
- Additional services include encouraging best-practices, maintaining directories, helping build digital library content, helping establish a cooperative online reference service, coordinating additional online content acquisition, and researching and experimenting with promising technologies and practices
- More than half of Montana's 750 libraries receive a direct benefit from MLN; our goal is to steadily increase this percentage.

Marketing: This project is 1/4th of the salary of our Communications and Marketing Coordinator, plus some production monies for the statewide marketing campaign. Plans for this coming year will expand on the current campaign under development: "your library, how do you use it".

The **Montana Shared Catalog** is a voluntary consortium comprised, as of December 2004, of fifty-six libraries, including seven branches. MSC libraries are found in thirty-six Montana communities, serving a combined population of approximately 375,000. The MSC runs on servers at the State Library and is accessed by librarians and users over the Web.

The MSC is growing rapidly, but currently serves fifty-six Montana libraries, who in turn serve 375,000 Montanans in thirty-six communities. The MSC lists 650,000 titles (over 1.6 million items) and extends their users' store of quality knowledge services far beyond their local brick-and-mortar library. Montanans find the MSC convenient and easy-to-use via the Web. The Montana Shared Catalog is comprised of all kinds of libraries—big and small, from public to school to special and academic, from east to west and north to south—with more libraries joining every year.

Library patrons can use the Montana Shared Catalog to:

- Conveniently search their own (as well as others') library's holdings
- View book reviews, tables of content, book covers, and book summaries
- Read first-chapter excerpts
- Scan bestseller lists and see which of these titles are available in their library
- Create a personal account, and use this account to place holds on anything in a library
- Use their account to be notified via e-mail when interesting materials come into the library

The Montana Shared Catalog helps Montana's libraries meet today's library users demands. It gives Montanans a rich and easy-to-use catalog of library resources, available anyplace and anytime.

The MSC is for calendar year 2005 budgeted to cost approximately \$158,300 in LSTA funds, and an additional \$255,000 in operational costs from MSC members. The LSTA funds are primarily for assisting libraries new to the MSC with their start-up costs.

Children's services: Project Description: Cindy Christin provides a training session on children's services at the Fall Workshop, attends the annual Collaborative Summer Reading Program meeting, and promotes and evaluates the collaborative program in Montana. MSL purchases summer reading program manuals for each public library in the state and distributes these materials several weeks earlier than if purchased individually by libraries. The purchase and

distribution of these manuals is intended to serve as a catalyst to the provision of quality summer reading programs all across Montana. * Additional funding will be available from some prior year summer reading program funds.

Project Impact: The project shows a commitment, though monetarily small, to children's services. Montana libraries are represented at the collaborative planning meeting and receive free program manuals in time to create a customized summer reading program for the community. In 2004, public librarians were very appreciative of receiving the manuals from MSL.

FY'05 Summer Institute: Project Description: The Institute will offer 3 days of training in two locations: Billings and Missoula (tentative). Sandra Nelson, author of *The New Planning for Results*, will again present training focused on strategic planning. Public library directors and trustees who were unable to attend the 2004 institute will be encouraged to attend this year's event. Directors and trustees that did attend the 2004 SI will be able to receive follow up training and guidance through a new online planning course developed by the Public Library Association (with input from Sandra Nelson) which will aid them in completing the planning process. The Institute is held on college campuses to save money over the more typical motel conference and to promote an atmosphere of learning and networking that has proven most beneficial to previous participants.

Project Impact: Both the message about the importance of library planning and the methods and tools needed to accomplish it will reach Montana librarians and trustees not yet involved in the process. In addition, critical follow up training will be available to libraries that have started planning, but need additional guidance to complete the process in their communities. MSL will be able to evaluate the usefulness and value of a specialized online course as a training tool for Montana librarians. **Funds from LSTA FY'04 were authorized for initial commitments necessary before the 2005 grant award was received. Early planning and commitments allows for better trainer and facility availability.

FY'06 Summer Institute Planning: Project Description: This funding will make it possible to secure trainers and facilities for the 2006 Summer Institute before the 2006 grant award is received from LSTA. This is especially important when planning events on college campuses because of the competition for dorm and classroom facilities from sports and other summer camps.

Project Impact: The Summer Institute can be scheduled and promoted before the 2006 LSTA funds are received helping to ensure a quality, well-planned training experience for Montana librarians.

The **Networking Task Force** is the advisory group that provides statewide and all types of libraries representation in discussion and planning for the future of library development in Montana. The NTF is budgeted for three meetings in calendar year 2005, at the amount of \$4,500. The NTF is an essential advisory group, providing direction for the Montana Library Network, and advising the State Librarian on all things related to library cooperation, resource sharing, online content and services, and library automation.

Fall Workshop: Project Description: The Fall Workshop is a centrally located, 2-day training event that is attended by librarians from all types of libraries from all parts of the state. It features half-day sessions on a variety of topics, the opportunity for librarians to network, no registration

fee, and a free lunch. 104 librarians and trustees attended the 2004 Fall Workshop in Great Falls. The 2005 event will be the 7th annual Fall Workshop.

Project Impact: Librarians are able to receive practical training to help them do their jobs at a minimum cost. Most topics are developed from requests MSL receives from the library community so the sessions address real training needs. The Fall Workshop attracts school librarians, a group MSL has limited interaction with, and public library trustees. Trustees now hold a luncheon meeting on the second day of the workshop.

Trustee Training: **Project Description:** This project will continue the statewide library development emphasis on improving the quality of Montana libraries by enhancing the knowledge and skills of the trustees who govern and lead our libraries. The project will provide a one-day workshop for Montana library directors and trustees designed to assist them in evaluating their library services. It will also fund the Library Board Education Program which will recruit, train and field a volunteer group of trustees who will in turn travel to nearby towns to train other trustees.

Project Impact: Trustees will benefit from learning more about Montana law, the job of a trustee, library advocacy, library evaluation, long term planning, etc. Gathering for a group-based trustee workshop provides trustees with important exposure to a continuing education curriculum designed specifically for trustees, as well as the opportunity to network with their counterparts from other libraries. Having trustee trainers teach other trustees at their libraries allows those unable to travel to a group workshop to still receive vital training. More boards will be involved more frequently with continuing education opportunities which sets the stage for communities, local library directors, and library patrons to benefit by having trustees who are knowledgeable about governing libraries.

Montana's **OCLC Group Catalog** is called **MLNCAT**, a customized union catalog of the holdings of more than 250 Montana libraries and over four million titles. (A union catalog lists materials held by a group of libraries). MLNCAT replaces the Montana Library Network Gateway, and features a friendlier, faster and more flexible OCLC FirstSearch interface. To search MLNCAT library clients need an Internet connection and a Web browser. To search regional and global libraries' holdings, library clients need home-access passwords, which are available from Montana libraries or the Montana Library Network. MLNCAT provides all Montanans with easy access to quality information through a world-class interface. Library clients can:

- Search MLNCAT and find the holdings of over 250 Montana libraries and, with an additional click, access WorldCat with its regional, national and global holdings of more than 56 million records
- View checked-in and checked-out information for items in more than 130 Montana libraries
- Limit searches geographically (Western, Central, Eastern, Hi-Line, statewide, regional or global libraries)
- Limit searches by library type (academic, public, school or special libraries)
- Choose from six interface languages, including Spanish

- Initiate interlibrary loan requests (this is each Montana library's option)

With MLNCAT, Montana librarians can:

- Use a convenient interface to access the OCLC Interlibrary Loan service (OCLC ILL)
- View statistics on MLNCAT usage by group and by individual libraries

We have a proposal for the remaining \$68,195 which is for a Statewide Trainer but I would like to hold decision on that piece until the April meeting due to a variety of unknowns at this time:

With the broadband pay plan changes we may face increases in salaries beyond what we have reflected in the budgets above,

we will not know until after the legislative session if in deed we are getting the position back for library development's clerical support,

we still need to fill a number of positions,

the Networking Task Force and Commission will be retreating next week and may have identified more critical needs.

PROJECT PROPOSAL FOR LSTA 2005 FUNDS

Project Title: **TRAVELING TRAINER**

Project Description:

This project will fill statewide training gaps affecting Montana librarians. The project will recruit and deploy a training professional to focus on delivering library skills training on both a statewide and local level. The trainer provided through this project will help librarians learn to more effectively integrate new technologies and services into their own library workflows. The position will bring a Montana perspective to the training librarians receive on OCLC FirstSearch, Gale and Ebsco magazine databases, statistical database and spreadsheet use, etc. This trainer will travel statewide conducting both formal and informal training sessions at host libraries with personnel, and, when appropriate, patrons invited to participate. This project will enable MSL to deliver not only more training, but more effective training through a locally customized approach designed to effectively target the needs of Montana libraries.

Project Cost:

\$50,000

Project Impact:

In recent years, a number of innovative projects authorized by the Montana State Library Commission have significantly impacted the range of services and delivery systems Montana's libraries use to meet the library and information needs of Montana citizens. Projects like the Montana Library Network and the group purchase contracts for OCLC services and InfoTrac online magazines are now accepted features on the Montana library landscape. Although these elements have moved from innovative to common practice, the support infrastructure for them lacks adequate development. We have provided Montana librarians with great tools, but they need on-going training to realize the full benefit of these tools and to be able to pass those benefits on to our citizens. The Statewide Technology Librarians are called upon to assist libraries with a variety of needs, of which training is only one. This project will place a new focus on training and serve as a conduit for the service innovations of recent years to truly benefit Montana's libraries.