

Memo

To: Commission Members
From: Darlene Staffeldt, State Librarian
Date: July 22, 2011
Re: Strategic plan 2006-2011 evaluation

Please find attached the full text of our current Strategic Plan dated 2006 -2011. *The statements that are italicized were provided by staff as updates/status reports; comments in red are the evaluation comments that came to me from various sources over the last nine months.* Sources included minutes from various meeting such as Federation meetings MLA meetings, NAC meetings, staff meetings; specific emails to me; comments left on the State Librarian's blog and/or the state library long range plan wiki.

After a review of the comments as well as work plans and performance evaluations of the staff members, I feel the State Library has been successful in meeting most of the goals and strategic initiatives that we had planned to meet. Please let me know if you have any questions as you review this evaluation.

MONTANA STATE LIBRARY (MSL)

STRATEGIC PLAN 2006-2011

August 15, 2006

VISION

MSL's information resources are supported by professional librarians, content specialists and information technology professionals. MSL efficiently and effectively provides high quality User-centric library services and content. The Library is funded at a level commensurate to meet its mission. MSL works collaboratively, partnering with other regional, national, and international organizations.

I feel over the past five years, we have met our vision with the exception of the funding statement.

MISSION

MSL meets the information needs of Montana government agency management and staff, ensures all Montana citizens have access to information created by their government, supports the role of all Montana libraries in delivering quality library content and services to their patrons, works to strengthen local community public libraries, ensures that Montanans who are visually or physically handicapped are provided access to library resources, and measures its successes by its patrons' and partners' successes.

Again I think we are happy with our Mission statement and we have been mostly successful at meeting the informational needs and supportive roles called for in the Mission statement.

VALUES

MSL believes that:

- Quality information leads to quality decisions.
- Knowledge is a critical resource for the future economic development of Montana and Montanans.
- Information produced by government should be easily accessible, widely distributed, and free to citizens.
- Montanans need and value convenient access to quality information resources.
- Responsive to patrons' needs, the State Library adds value to data and information by integrating it with other data and information.
- Citizens must be able to privately seek information without fear of scrutiny.
- Libraries play a vital role in providing Montana with access to knowledge and new information.
- Libraries are critical for the just, efficient, and effective collection, management, and distribution of quality information in a digital age, and vital in a democracy founded on the principle of an educated and inquisitive citizenry.
- Information about natural resources, the land which is central to quality of life and economy, is especially critical to Montana citizens and government.

PREFERRED FUTURE

MSL is user-centric. Its patrons (including public agencies, libraries, businesses, organizations, and individuals) come first. MSL's success is measured against patron satisfaction and outcomes. The State Library is one library, working closely within the various programs, and with other libraries and other partners, satisfying each libraries' communities' needs. Collaboration is the tide that raises services for all Montana libraries' patrons. MSL collaborates with other state agencies, libraries, archives, and museums; both in Montana, regionally, nationally, and at times, internationally. MSL staff communicates effectively within the Montana State Library, with Library patrons, and with other libraries and partners. MSL supports Montana libraries' efforts to stay relevant to their communities and to improve the ability of libraries to provide quality library services. MSL is valued by its patrons and partners, and perceived as a premier source for quality knowledge content and services. Its collections mirror and meet its communities' needs. The Library's services are timely, relevant, efficiently provided, and effective.

The Library's staff is extraordinarily good at what it does. The Library is nimble, operating in a rapidly evolving environment and thriving on change. MSL recognizes that it is one of many sources for data, information, and knowledge resources. MSL looks outside the library world for promising technologies and practices, and selects strategies and resources based on the degree to which they support its mission.

MSL connects patrons to quality information resources and providing value added library services—enabling the transformation of data and information into knowledge. MSL compellingly makes its case to decision makers, so that it is funded at a level commensurate to its mission.

FIVE AGENCY-WIDE GOALS

Goal One—Content

MSL acquires and manages relevant quality content that meets the needs of Montana library partners and patrons.

Goal Two—Access

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

Goal Three—Consultation and Leadership

MSL provides consultation and leadership to enable its patrons and partners to reach their goals.

Goal Four—Collaboration

MSL promotes partnerships and encourages collaboration among its partners and patrons so that their information needs can be met.

Goal Five— Sustainable Success

MSL is a well-run organization and a sought-after employer; it is efficient and effective (measured against partner and patron outcomes), and successfully engaged in its ongoing mission.

Goal One—Content—Discussion

1. MSL acquires and manages relevant quality content that meets the needs of Montana library partners and patrons.

1.1. Identify, acquire, catalog, and preserve Montana State agencies' publications for permanent public access. *Yes, we are identifying, acquiring, cataloging and preserving Montana State agencies' publications for permanent public access.*

During the 2007 Legislative Session, MSL, with the assistance of the Permanent Public Access Committee, revised MCA 22-1-219 to include all state agency publications regardless of format. This change gave MSL the statutory authority to manage digital state publications. Since that time MSL has taken the following steps:

MSL implemented a system using our FTP site that allows state agency employees to electronically "deposit" born digital publications with MSL;

Additionally, in 2007 we subscribed to the Internet Archives' (IA) Archive-it web archive system. This system archives websites within the mt.gov domain. Most websites are archived monthly though this frequency varies some based on the frequency of content change.

MSL also worked with the IA to index all previously archived state agency websites available through the IA Wayback Machine;

All archived pages are available through our online website Archive Montana.

Finally, MSL continues to contract with the IA to digitize our legacy print state publications collection. We digitized and processed 8,191 state publications in FY09, 1,739 publications in FY10, and 2,424 publications in FY11. Due to recent budget cuts MSL will be forced to reduce our budget for digitization from \$40,000 to \$25,000 annually.

Digital state publications are available through the Internet Archive site and are discoverable through the Montana Shared Catalog, WorldCat, the Montana Memory Project and all major search engines.

We have the state publications librarian position currently open and thus it will reduce our outreach effort with State Agencies but we hope that we will not "miss" publications.

1.2. Acquire, catalog, and maintain information relating to the natural resources and the geography of Montana, for permanent public access. *Yes, we are doing this. MSL's natural resource collection consists primarily of state agency publications, federal publications, online and some print journals and periodical databases. This collection is regularly monitored for use but has experienced little growth due to lack of resources and staff support.*

1.3. Collect library material to serve the professional development needs of Montana's librarians and public library trustees. *Yes, we are doing this. MSL's professional library development collection consists primarily of online databases, electronic and print journals and new materials recommended by MSL LDD staff.*

1.4. Manage the Montana Talking Book Library and serve eligible patrons (with talking books, Montana recorded books, Braille books, etc.) according to federal and state mandates.

Yes, currently serving 2500 blind or physically handicapped Montana citizens. We have expanded our outreach program hoping to meet the needs of more special Montanans.

1.5. Continue and extend Montana State Library's statewide e-content purchase programs. *Statewide Projects Librarian has done this; some examples of new content programs are Heritage Quest, Montana Lib2Go.*

According to Montana librarians e-content purchase programs are considered to be one of the most valuable accomplishments of the State Library over the last five years: MSL successfully encouraged continued support of databases from the Legislature as it provides equal access to all Montana users.

1.6. Work collaboratively toward developing, managing, presenting, and preserving Montana-relevant digital content. *Yes, the Montana Memory Project is one example. Sixteen libraries currently contribute to thirty-four collections the MMP and that number is growing regularly. In addition to providing access to digital content, the MMP ensures that contributors are also preserving "digital masters" to guarantee long term access. MSL and the Montana Historical Society licensed the OCLC Digital Archive as a dark archives that MMP contributors can use. Additionally, by partnering with the Internet Archive, MSL is able to contribute to statewide e-content efforts by making digital state publications available in a variety of formats including PDF, text, EPUB and Kindle.*

Content was considered to be one of the most valuable accomplishments of the State Library over the last five years.

Goal One—Content—Strategic Initiatives

MSL Collection

- a) Focus MSL's collection in three areas: Montana state publications, professional development materials for librarians, and information about the natural resources of Montana. *Yes*
- b) Discontinue the acquisition of 'trade' books, magazines, and databases. *Yes*
- c) Identify, acquire, catalog, and manage a professional development collection to support the needs of Montana librarians and public library trustees. *Yes*

Digital Collections, Statewide Content

d) Create a profusion of Montana-related digital collections by giving libraries the tools to create collections, and library patrons with access to digital snapshots of their cultural heritage. *Yes, expansion of the Montana Memory Project includes the establishment of an Executive Committee, an online project planning process for interested libraries, the gradual creation of a statewide registry of digital collections and the acquisition of two traveling scanner/laptop sets.*

MSL is also providing training to communities served through the Touchstone Project. This National Endowment for the Humanities grant-funded project managed by the Montana Preservation Alliance encourages communities to come together to preserve their local heritage. All digital content created through this grant is contributed to the Montana Memory Project.

e) Continue the statewide OCLC and e-content purchase programs to cut costs and provide library materials and services to Montanans that alone, libraries would never be able to manage or afford. In addition to MSL's statewide OCLC purchase, acquire other subject areas. Examples include MSL's current magazine article database contract, the Library's statewide contract for automobile repair reference center and the college search and test database, or other similar reference databases or services. *Yes, yes, yes, numerous statewide e-content and bibliographic services contracts maintained, updated, and/or developed. MontanaLibrary2Go has grown to 40+ libraries, with over 5000 titles including both downloadable audio and downloadable e-books.*

State Document Depository Issues

f) Increasingly migrate (as appropriate) the State Depository Library Program toward digital formats for discovery, request, and delivery. *Yes*

g) Digitize, as appropriate, the current print collection of state publications to make them easier to manage and more accessible via the Library's digital collection. *Yes, in process, see note above.*

Considered to be one of the most valuable accomplishments of the State Library over the last five years: Digitization of state publications.

This provides equal access for all to browse and use. When users ask for Gov docs and we tell them we need to ILL from the State Library they are not interested in waiting for the info. With the digital docs they can use them immediately.

h) Make the World Wide Web the primary means by which MSL patrons and partners discover, request, and obtain information for which MSL is the primary steward. Serve this content to users at their desktop. *Yes, in addition to those accomplishments noted above MSL has redone much of the website, have new data tools such as RSS feeds, the Montana GIS Portal, online statistical tools, etc. Staff created mymontanalibrary.org, a site for patrons that features resources created by the Montana State Library. Staff is also developing website accessible for mobile devices.*

(MSL's print collection remains important, but there is an emphasis on discovery, request, and delivery using the Web—for both print and electronic publications and information.)

i) State publications which are born digital are captured in a digital repository and maintained for permanent public access. *Yes*

j) Improve State publication distribution practices to increase these publications usefulness, and to reduce systemic per item management costs. *Yes*

k) Work with depository libraries to provide access to digital state publications. Implement a program to provide persistent access to digital publications. *Yes, digital depository program developed.*

l) Discontinue MSL's participation in the Federal Depository Library Program. Rely instead upon the regional and nearby federal depositories to provide federal government information. *No, although the decision was made to significantly reduce the selection of federal*

publications, it was decided to maintain the State Library's participation in the Federal Depository Library Program because federal documents are a primary source for natural resources about Montana which supports MSL's collection development policy. We will continue to receive items in the natural resources collection area.

m) Work with the federal regional depository librarian to develop a plan regarding the dispersal of MSL's federal documents collection, in a manner that will best benefit Montanans. Consider how to keep and eventually digitize non-digitized high value (value defined by utility, not necessarily monetary value) portions of the federal documents collections. *MSL significantly weeded the federal document collection to focus almost solely on Montana natural resources information. Weeded publications were offered to the regional depository librarian at the University of Montana.*

Reference and Interlibrary Loans

n) Contract for reference and interlibrary loan services, in support of state agencies—providing state agency employees with more convenient access to specialized licensed database articles. *We have continued to provide reference and interlibrary loan services from our information desk in Library Information Services Program. We have increased e-content access as funding and availability allows.*

o) Focus MSL's reference expertise on the materials in the MSL collection. *Yes*

Geographic Information

p) Broaden the focus of MSL's Natural Resource Information System to provide natural resource-related information in a variety of formats, building linkages between textual sources and geographic datasets. *Yes, including participation in projects such as GeoMapp.*

q) Improve the representation of biological data and information, maintained by the Natural Heritage Program, in MSL's collection. *Yes, through the MSL digitization project, MSL made digital versions of all NHP publications (more than 300) available through the Internet Archive. Recent statistics show that these publications have been downloaded more than 18,000 times. NHP will soon use WorldCat records to populate their Publications webpage rather than maintaining the list through standard html thus increasing research opportunities for patrons.*

NHP also created links to WorldCat through the Montana Field Guide. Each entry in the Field Guide has the option to initiate a search in WorldCat for that species.

r) Accurately document the distribution, status, and ecology of Montana's native species and habitats, emphasizing detailed documentation of those that are declining or at risk. *Yes through the Montana Field Guide and online Tracker application users can search for species and ecological systems information for approximately 5200 species. Search results include complete descriptions, range maps, species of concern information and reported sightings.*

s) Participate in Montana's federated Geographic Information System (GIS) community by serving as Montana's Geographic Information Clearinghouse. In addition to maintaining the GIS data list, Bundler, Digital Atlas and Topofinders, in 2008 MSL launched the Montana GIS Portal, an online catalog for Montana GIS data sets. *MSL also participates as active member of Montana Land Information Act Advisory Council (MLIAC), Montana Association of Geographic*

Information Systems Professionals, as well as incorporating Base Map Service Center staff into our physical space (currently working towards making that an administrative as well as physical move).

t) Acquire, catalog, and maintain for permanent access snapshots of the geospatial data layers comprising the Montana Spatial Data Infrastructure as well as other important statewide and regional geographic datasets. *For years MSL has kept copies of superseded data for preservation purposes. In 2011 MSL was awarded approximately \$100,000 to participate in the Geospatial Multistate Archives and Preservation Partnership to develop best practices which will ultimately lead to a formal geospatial archives program managed by MSL.*

u) Host MontanaView, an archive of publicly available, remotely sensed images. *MSL continues to host MontanaView imagery although this group has not actively grown.*

v) Serve as the steward for the Hydrography⁴ and Orthoimagery⁵ layers of the Montana Spatial Data Infrastructure. *MSL is recognized by MLIAC as the State steward for Hydrography and as co-steward of Imagery along with the Base Map Service Center. Additionally, NHP is the steward for Land Cover and is the primary project manager for Wetlands under stewardship from the Montana Department of Environmental Quality.*

Montana Talking Book Library

w) Maintain Montana Talking Book Library's audio cassette book collections produced by the National Library Service. *Yes*

x) Acquire, catalog, record, preserve and distribute for all eligible Montana patrons a selection of Montana recreational, historical and general informational audio books and magazines, for adults and children at all grade levels in two Montana recording studios according to the governance of Montana. *Yes*

y) Continue Montana Talking Book Library's Montana-specific recording program. *Yes*

z) Continue to acquire, catalog, and distribute Montana Talking Book Library's Twin Vision Braille collection and its Descriptive Video collections. *Yes*

aa) Improve Montana Talking Book Library's ground-breaking digital audio software recording program.

bb) Acquire, catalog, develop, preserve and distribute audio books, in current and emerging formats, for Montana Talking Book Library patrons.

Goal Two—Access—Discussion

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

Our work within the GIS Portal, online statistics, online state publications, etc. have made effective access to library content and services. Program such as the databases treasure hunt, hunter's companion, etc. have encourage online access and use of many of our content pieces.

2.1. Improve the usability of MSL's Web sites and service to meet changing patron needs.

2.2. Improve Montanans' access to library materials (including discovery, request, and delivery), providing more materials to choose from, and making it self-service, more convenient, and increasingly efficient.

Goals we have met include the establishment of a central authentication tool for libraries interested in offering centralized authentication to their patrons, to external third party subscriptions and resources (EZProxy). We continue to learn from this pilot. A limited pilot of OCLC's integrated discovery system, WorldCat Local, increased our understanding of these types of systems. In addition to mymontanalibrary.org which was designed for patrons. MSL staff worked with the webmaster to develop a template for public library websites. This template gives small libraries a web presence. Patrons benefit with links to the databases and other individual library content. Approximately 12% of our public libraries have taken advantage of this template.

2.3. Make reference and interlibrary loan services available to state agency employees. Yes, provided via LIS, NRIS and NHP staff.

2.4. When MSL's collections provide answers to patrons' questions, or materials that patrons' needs—provide reference, circulation and interlibrary loan services, supplying assistance and materials to patrons and to other libraries.

2.5. Assist Montana libraries with 'fulfillment', that is, getting the right library content into patrons' hands quickly, efficiently, and at a price libraries can afford, regardless of whether the item is owned by the patron's local library.

Access to the Gale and EBSCO statewide database statistics was created for all libraries enrolled in the statewide databases, allowing libraries to run usage reports.

Courier pilot update

2.6. Publicize Montana State Library's services and resources within MSL partner and patron communities.

Statewide consulting librarians frequently talk about and demonstrate MSL services and resources when visiting public libraries. Trainings/webinars have also been offered to inform librarians and trustees of MSL services and resources.

2.7. Support Montanans' continued free access to the Internet provided through their local public libraries.

Broadband Technology Opportunities Programs (BTOP) Grant

Access and training were considered to be two of the most valuable accomplishments of the State Library over the last five years.

Goal Two—Access—Strategic Initiatives

Networked/Collaborative Access

a) Provide the option of federated searching for library patrons statewide. This includes text and GIS portal services, providing access to MSL's text and geospatial datasets. The entire MSL collection would become searchable with keyword, controlled vocabulary, and geographic search terms. *MSL completed an RFI and an RFP and ultimately selected Ebsco Discovery Host as an integrated discovery service. By fall 2011, under contract with Ebsco Industries, MSL will configure and launch the Ebsco Discovery Service, a vendor-hosted, integrated discovery system that will provide "google-like" indexing and single-search capabilities across the OCLC WorldCat database, the Montana Shared Catalog, the Montana Memory Project and currently*

licensed statewide resources. As time and funding allows, add additional local resources such as the Montana GIS Portal and additional library catalogs.

b) Implement GIS portal technology to catalog and provide access to geospatial datasets held at MSL. Provide an interface that allows users to publish metadata records, organize groups and provide access to geospatial data held at their organizations.

MSL launched the Montana GIS Portal in September 2008 and issued a major release in October 2009. The Portal includes all major functionality originally conceived and makes searchable metadata records for more than 400 Montana GIS datasets. MSL used the Esri GIS Portal Toolkit software to create the GIS Portal. This software is somewhat disappointing in its ability to customize search options. The software recently went open source and MSL is optimistic that this change will result in improved functionality.

c) Work with partners to provide more convenient access to networked library content and resources, by offering statewide authentication⁸ services, available to libraries and their patrons. *EZ Proxy Pilot*

d) Continue to strengthen the Montana Shared Catalog.

Considered one of the most valuable accomplishments of the MSL over the last five years: the growth and support of the MSC which provides equal access to users around the state. As of July the MSC serves 139 Montana libraries and their patrons.

e) Continue to improve MLNCAT, Montana's union catalog, to include a larger percentage of Montana libraries' holdings, from more Montana libraries, providing patrons over the open Web with increasingly personalized self-service (machine-mediated) access to a growing variety of content.

Natural Resources Information

f) Improve access to Natural Heritage Program (NHP) data and information holdings through MSL discovery and access mechanisms. See Goal One, Initiative q. Additionally NHP GIS data is discoverable through the Montana GIS Portal

g) Continue to provide value-added geographic-related products and services, such as the Montana Digital Atlas, which give non-GIS users access to geographic information about their state. *In addition to maintaining MSL's popular mapping applications such as the Digital Atlas and Topofinders, MSL launched a Geographic Literacy Campaign help librarians better help their patrons identify and answer geographic and natural resource inquiries. As a part of this campaign MSL release two "natural resource companions," the Hunting and Fishing Companions. These online resources are designed around specific user questions and encourage the use of online applications.*

h) Implement an updated comprehensive mapping application to replace existing interfaces. *A beta version of the Digital Atlas exists. This new application is based on updated ArcGIS software and takes advantage of web mapping services rather than traditional applications which rely on locally maintained content. Due to staff turnover the new Digital Atlas has not been released but will be in the fall of 2011.*

i) Implement an ongoing support program to train and inform public agency staff in effectively using NHP resources, services, and applications.

MSL Traditional Library Services

j) Evaluate the means by which MSL provides reference and interlibrary loan services to state agency employees. Adopt a plan which both improves services and lowers per transaction costs.

k) Close the reading-room and reference desk services in order to allow staff to focus on acquisitions, managing the print and digital collection and providing access to library materials over the Web. *This has not been accomplished at this time.*

l) Host web pages organized around particular topics related to MSL collections, with content provided by professional librarians and subject area experts. *See Goal Two, Initiative G. Additionally, MSL created “collections” focused on specific topics that draw on archived websites through Archive Montana. Examples of these collections include Energy, Drought, Water Rights, Wild Fire, State Government, Public Education and Montana Governors.*

Montana Talking Book Library

m) Match Montana Talking Book Library patron library needs with available collection resources.

n) Provide Montana Talking Book Library patrons with reference and resource materials in accessible formats.

o) Provide current and emerging machine formats for Montana Talking Book Library patrons.

p) Supply and maintain a Machine Lending Agency within Montana Talking Book Library for distribution for eligible Montana patrons of quality playback equipment and accessories.

q) Maintain the Montana Talking Book Library's high quality of service, by maintaining its databases for patrons, collections, cataloging, periodicals and equipment.

r) Maintain cassette machines and accessories for Montana Talking Book Library patrons.

s) Provide eligible Montana Talking Book Library patrons with direct access to services, including telephonic, electronic, public audio media and audio book distribution centers.

t) Secure additional avenues for eligible Talking Book Library patrons to access alternative services indirectly through public and regional libraries, retirement facilities, schools, et cetera.

u) Provide online WebOpac access to library collections and WebBraille access to electronic Braille collection.

v) Offer Montana Talking Book Library patrons electronic books on portable players through Consortium partnership.

w) Pursue outreach avenues to serve new Montana Talking Book Library patrons.

TBL services are critical to my well being, I need to have my ability to “read”.

“I didn’t think my life could get any easier but is has not that I have my digital player and books. Thank you for making sure us blind folks have the same access to wonderful books as everyone else does. This rocks!”

Goal Three—Consultation and Leadership—Discussion

3. MSL provides consultation and leadership to enable its patrons and partners to reach their goals.

3.1. Represent the interests of public libraries in appropriate legislative, community, regional, and national forums.

Actively involve with the 2011 Montana Legislature including but not limited to presentations at six hearings. Attendance at the 2011 National Library Legislative Day in Washington DC and met with all three Congressional offices.

3.2. Advise Montana libraries regarding administrative concerns, such as funding, budgeting, policies, and personnel. *Advise and consultation provided ongoing as needed efforts via the three Statewide Consulting Librarians, Director of Statewide Library Resources and State Librarian.*

3.3. Train and assist partners, regarding their contribution of content to MSL's collection.

3.4. Provide patrons and partners with training and assistance regarding the use of MSL resources. *Training and assistance is provided ongoing efforts by the three Statewide Consulting Librarians and Statewide Trainer.*

3.5. Establish and maintain a frequent level of contact with public librarians, public library trustees, and others in order to remain cognizant of their needs and the challenges they face.

Statewide consulting librarians visit each library at least once a year. In addition MSL staff frequently advises librarians and trustees during other events such as MLA, Fall Workshop, and trustee workshops.

3.6. Provide advice to partners and patrons concerning opportunities for cost-saving and operational-efficiencies.

Successful collaborative approaches have been worked out with a number of projects including but not limited to: Courier pilot project, Heritage Quest database purchase, Montana Memory Project, and MontanaLibrary2Go

3.7. Provide leadership and agency support in identifying and addressing key information gaps and providing stewardship of Montana state publications, geospatial data, natural resource information and electronic datasets.

3.8. Design, deliver, and evaluate training with client-learning as the Library's goal.

Training specialist initiated and continues online learning opportunities. Many librarians have expressed their gratitude about the development of these online trainings as it saves them money and time. LDD staff continue to offer face to face trainings whenever it is more appropriate to do so.

Consultation and leadership were considered to be some of the most valuable accomplishments of the State Library over the last five years.

Goal Three—Consultation and Leadership—Strategic Initiatives

Library Development

a) Provide leadership, training, and consulting assistance to Montana's public libraries, which directly contributes to their overall sustainability, improves their capacity to be self sustaining, and augments their ability to provide a high standard of library service.

Our statewide consulting librarians continue to be mentioned by librarians and trustees throughout the state as one of the best things we offer and please continue to have them!

b) Promote the importance of quality local library services to county and city government leadership and provide consulting assistance to help them establish and sustain those services in their communities. *MSL staff have maintained informal, but positive*

relations with MACO. We have partnered with MACO staff to offer training sessions and assistance to librarians. In addition statewide consulting librarians frequently review documents and talk to librarians about promoting the library to local government officials.

In addition the Data Coordinator developed online statistical tools and a return on investment calculator that librarians and trustees have used to show the usage and value of their libraries.

c) Help Montana libraries identify and discuss critical issues, and then draft local policies which are both responsive to these issues and consistent with best library practices. *We provided several trainings about policy development that emphasized the importance of thinking of the community and user when developing library policy.*

d) Help Montana libraries identify appropriate levels of compensation for library staff.

e) Identify appropriate federal, state, local, and other funding and resource opportunities and work in partnership with interested libraries to acquire them.

The BTOP grant was a great thing for Mt libraries and was considered to be one of the most valuable accomplishments of the State Library over the last five years.

Library Management

f) Provide leadership, training, and assistance for building a mixed print and electronic collection of publications, maps, indexes, and etcetera.

g) Provide advice to partners and patrons concerning opportunities for cost-saving and operational-efficiencies.

h) Provide leadership, training and assistance in the creation of metadata records.

Montana Talking Book Library

i) Work with public and other regional libraries, local, state and private sector entities to expand outreach education of Montana Talking Book Library services and inform them of the laws that govern these services.

j) Provide leadership, training and assistance in the appropriate management and use of all audio books and equipment in specialized formats for use by eligible Montana patrons according to State and Federal requirements.

k) Provide leadership, training and assistance in the proper maintenance and distribution of specialized formatted audio books and equipment to maximize use to eligible Montana patrons.

Goal Four—Collaboration—Discussion

4. MSL promotes partnerships and encourages collaboration among partners and patrons so that their information needs can be met.

4.1. Encourage and facilitate information-sharing partnerships among federal, tribal, state and local governments, businesses and citizens.

4.2. Collaborate with state and federal agencies in order to improve access to public information.

4.3. Make the Montana Library Network thriving consortia of consortium, of which Montana libraries are a member.

4.4. Encourage partnerships with public, private and non-profit organizations to help meet mutual goals.

4.5. Provide a means by which patrons and partners may have convenient authenticated access to library content.

4.6. Help partners develop collaborative relationships and cooperative projects with other state, regional, national, or international partners (libraries, schools, colleges, museums, archives, local and tribal governments, non-profit organizations, government agencies, the business community, et cetera). MSL staff have assisted libraries and schools with the development of public/school community libraries that provide library services to small communities without a public library.

4.7. Help partners tell their story and market their content and services to their patrons and partners. *In addition to marketing materials created by our Communications/Marketing Coordinator officer we have attempted to add widgets and other electronic logos, so libraries can easily promote electronic resources through their websites.*

4.8. Help libraries develop Web-accessible Montana-related digital content, and provide Montanans with access to digital collections and items relating to Montana's cultural heritage.

4.9. Promote and promulgate library-related automation, data, and networking standards.

Collaboration is part of most existing statewide projects and pilots, making growth and long term sustainability a possibility. MontanaLibrary2Go, the Montana Shared Catalog, MSC Partner, MSC 4-Rivers, BridgerNet and the HiLine group, the OCLC Group Services statewide contract and the Heritage Quest subscription all are sustained by collaboration through shared cost formulas, mentoring by peers, shared catalog records, shared users and circulation across multiple libraries and floating collections. This is a hugely important goal and MSL would not be the agency it is today without collaboration on so many levels. Just from my own little world, we have had tremendous success partnering with other agencies like Fish, Wildlife & Parks, DPHHS - Head Start division, and OPI, as well as private partners like Mountain West Bank. I think as we move forward, collaboration must continue to be a big priority but we also need to make sure that we are able to be good partners ourselves. This is often a funding issue as we rely on our more moneyed partners to provide us with assistance; we need to make sure that we try our hardest to adequately fund programs and collaborative efforts so that our partners don't expect to see us coming with our hands out. Of course there are other things that we bring to the table, but it will only help us in the long run if we make sure that adequate funding and support is behind every initiative.

Collaboration and programs were considered to be two of the most valuable accomplishments of the State Library over the last five years.

Goal Four—Collaboration—Strategic Initiatives

MSL Collections and Information

a) Under partnership agreements, carry out specialized work for partners that make ongoing contributions to the library collection, in order to improve access to public information.

b) Discontinue hosting web sites for other state agencies, with the exception of web applications that rely upon GIS infrastructure unique to MSL.

c) Foster the development and growth of a vibrant Montana Shared Catalog.
Montana Shared Catalog has grown to 140 libraries.

d) Increasingly become a contributing member to the Montana Library Network Consortium.

e) Coordinate and increase partner sharing and exchange of animal and plant observation data and ecological information through NHP.

f) Discontinue serving as a Geographic Information Systems service bureau or web-development shop for other agencies.

Montana Talking Book Library

g) Seek additional resource partnerships to offer a wider variety of formats to patrons, including the best suitable technology and training to its patrons, staff and volunteers. Strive to increase patron awareness of and access to additional resources and electronic reference sources in Montana that supplement its services, specifically public libraries and human service agencies that can be accessed by adaptive software.

h) Collaborate within the Montana State Library, state government, other regional and public libraries as well as community organizations, to raise the awareness of services and maximize resources to eligible TBL patrons.

i) Coordinate partnerships with public, private and non-profit organizations that serve a common targeted population of blind, low vision, physically and reading handicapped patrons.

j) Maintain a current list of eligible Montana patrons of all free audio periodicals provided by the National Library Service, Montana Talking Book Library, other U.S. Regional Libraries for the Blind and Physically Handicapped.

Goal Five—Sustainable Success—Discussion

5. MSL is a well-run organization and a sought-after employer; it is efficient and effective (measured against partner and patron outcomes), and successfully engaged in its ongoing mission.

5.1. Achieve and maintain funding at a level commensurate with MSL's mission.

5.2. Sustain administrative resources sufficient to support mission critical content and services.

5.3. Evaluate content and services against MSL's mission.

5.4. Meet the American Library Association standards for MTBL staffing as recommended by the National Library Service.

5.5. Use Federal Library Services and Technology Act moneys to support new MSL projects; and support ongoing projects using State funds.

5.6. Recruit and retain the staff resources necessary to meet the responsibilities of its statutes and mission.

MSL made good effort in the early part of this strategic plan period to implement the intent of the broadband pay plan. MSL established some common evaluative criteria for performance objectives and most supervisors initiated an annual review process with their employees. One year MSL was able to offer bonuses to employees. This bonus was based on years of service. It was understood that should funding be available for raises or bonuses in this manner in the future, this should be done based on performance. Unfortunately, the last two years of the period MSL was hindered by vacancy savings requirements and a moratorium on raises. This essentially hampers the broadband pay plan process.

5.7. Foster staff members' sense of accountability, value and satisfaction in their achievements and their contributions to MSL's mission. *While some supervisors successfully implemented the use of performance objectives and annual reviews this was not the case for all supervisors. Nor were the performance objectives always tied back to strategic plans. I think this*

is an area where we can improve in the future. I think employees would appreciate seeing how their work ties back to the overall goals of the agency as well as one another.

5.8. Diversify MSL's staff knowledge, skills and abilities. *I think that we need to make more of an effort to keep staff trained and engaged in trying new things/new technologies, especially. Since our budget has been so drastically reduced, I can see where this would be an issue for some time. However, I think there are creative things we can do to challenge staff and get them thinking in new directions (i.e. that workshop led by Tracy and Suzanne last year that focused on wireless technology -- it was fascinating and motivating to try something different!)*

5.9. Develop the leadership and management skills of the workforce in anticipation of significant turnover at upper management levels in the next five years.

5.10. Market MSL content and services effectively.

5.11. Provide for an information technology (IT) infrastructure which insures industrial-strength capacity, throughput, and reliability. *MSL has successfully replaced much our outdated hardware in our data center, our desktops and laptops, our laptop labs and we were one of the first agencies to upgrade to Windows 7 and MS Office 10. We are implementing some virtual servers and have upgraded to an ArcGIS Server environment. The biggest challenge we face as an agency is lack of IT staff. We have too many staff pulling double-duty. Our network administrator also provides desktop support. Backup desktop support comes from a GIS analyst and our GIS Programmer does database administration. Ideally we would have at least one more FTE to support our IT environment. Lacking FTE I believe MSL will have to slowly begin to use the resources of the State of Montana Data Center and/or the cloud.*

5.12. Seek guidance from advisory groups and maintain or build feedback from other sources (focus groups, surveys, informal contacts, etc.)

Goal Five—Sustainable Success—Strategic Initiatives

Funding

- a) Seek the necessary funding to support Montana State Library's mission.

Personnel

- b) Fill appropriate open staff positions as quickly as possible, including necessary new positions.
- c) Commit to a program for continuing staff improvement, by providing opportunities for quality, timely affordable training and continuing education.
- d) Refine MSL's recruitment process to reach a sufficient variety of qualified applicants.
- e) Routinely review MSL's pay matrix, identifying and addressing pay inequities, so that these can be corrected as funding becomes available.
- f) Develop fair and usable pay components, within budget constraints under the broadband pay plan. Train managers to better understand and effectively use broadband.

Other

- g) Maintain and use a strategic marketing plan.
- h) Optimize the use of the Library's facility.
- i) Establish a long-term institutional home, providing effective administration of the NHP and support for continued excellence, innovation, and diverse partnerships.
- j) Continue MTBL's successful volunteer Program.

GLOSSARY

Acquisitions—The process of selecting, ordering, and receiving materials for library or archival collections by purchase, exchange, or gift, which may include budgeting and negotiating with outside agencies, such as publishers, dealers, and vendors, to obtain resources to meet the needs of the institution's clientele in the most economical and expeditious manner.

<http://lu.com/odlis/index.cfm>

Ask-a-Montana-Librarian—A project approximately twenty-five Montana libraries, cooperatively offering chat and e-mail reference services over the Web. The service uses (2006) a remote hosted application from OCLC called "QuestionPoint".

Audio books—Books whose text is spoken by a narrator. Originally these books were on phonographic disks. Now cassette tapes have replaced phonographs. New digital technologies promise to replace cassettes sometime within the next decade. Each media requires a special player, for user convenience and to protect copyrights.

Authentication— A process of proving the identity of a computer or computer user. For users, it generally involves a user name and password. Computers usually pass a code that identifies that they are part of a network. <http://www.cheap56k.com/glossary/Authentication.html>

Cataloging—A comprehensive list of the books, periodicals, maps, and other materials in a given collection, arranged in systematic order to facilitate retrieval (usually alphabetically by author, title, and/or subject). http://lu.com/odlis/odlis_c.cfm

Courier—A person or service hired by a library to retrieve materials on request from an off-site storage facility or to transport materials from one library to another within a library system or consortium, as opposed to relying on the postal service or a commercial delivery service. http://lu.com/odlis/odlis_c.cfm

Descriptive Video—...The equivalent of closed-captioning for the visually impaired. It consists of an audio track that contains all the elements of the show plus, in between the lines of dialogue, a narration of the visual elements that appear on the screen... http://gandh.ca/descript_video.html

Federated searching-- Federated Search is a search system that allows you to search for documents from multiple (partner) collections, instead of having to search each one separately. You benefit by performing one search and getting integrated results at once. These search engines can search not only library catalogs but also commercial abstracting and indexing

databases, web search engines, and a variety of other databases, while often merging and de-duplicating (a.k.a. de-duping) results. Also known as *metasearch* or *parallel search*”

http://www.educause.edu/content.asp?page_id=645&PARENT_ID=694&bhcp=1

Staff discussions imagine a single search mechanism which accesses all three areas of the collection (or drills down to one collection by itself), as well being able to search external catalogs and online resources, using a single user interface and keyword (text) and/or geographic search terms.

Fulfillment—Fulfillment may include a variety of tools and processes, including but not limited to: acquisitions, courier services, shared collections or jointly purchased content, floating collections, collection development, reference, interlibrary loans, and et cetera, development, reference, interlibrary loans, and et cetera.

Geospatial— Geospatial data is information about the shape and location of objects on the Earth's surface which can be manipulated in desktop mapping or GIS programs.

<http://www.ryerson.ca/madar/geospatial/whatis.html>

ILS—Integrated Library System, also, Library Management System. An integrated set of applications designed to perform the business and technical functions of a library, including acquisitions, cataloging, circulation, and the provision of public access...

http://lu.com/odlis/odlis_l.cfm#libms

Index—an alphabetical list of some or all the significant words in a text. Also, a finding guide to the literature of a specific field or discipline. [Significantly shortened and paraphrased from

http://lu.com/odlis/odlis_i.cfm]

Indexing—the process of by hand, or by using indexing computer software, creating an index from a body of text.

Interlibrary loan—Verb: The process of one library borrowing or lending an item from another.

Noun: The item borrowed or leant by one library to another.

Library automation standards—Library standards enable libraries to interoperate. Standards include application standards, data standards, data communications standards, and interoperability standards.

Machine-mediated—Computers exchanging information with other computers, in a structured fashion, managing processes (such as interlibrary loans) without the aid of human intervention.

Metadata—Literally, "data about data." A traditional library catalog record is metadata about the book it describes. Although AACR2/MARC cataloging is formally metadata, the term is generally used in the library community for nontraditional [cataloging] schemes such as the Dublin Core Metadata Element Set, the VRA Core Categories, and the Encoded Archival Description (EAD). Metadata has been categorized as descriptive, structural, and administrative.

http://lu.com/odlis/odlis_m.cfm

MLNCAT.org—Montana's union catalog, that is, a list of most the books owned by a growing number (300+) Montana libraries, with links to local online catalogs, and resource sharing functions such as OCLC's interlibrary loan system.

Montana Library Network—A consortia of Montana library consortium. A program of the Montana State Library, begun in 1999 by the MSL Networking Task Force advisory group, and the MSL Commission

Montana Shared Catalog—A shared online catalog and circulation system, hosted by MSL, with 140 member libraries (of all types) statewide.

Online Catalog—a library catalog consisting of a collection of bibliographic records in machine-readable format, maintained on a dedicated computer that provides uninterrupted interactive access via terminals or workstations in direct, continuous communication with the central computer. http://lu.com/odlis/odlis_o.cfm

Online (or cooperative) reference—Reference services requested and provided over the Internet, usually via e-mail, instant messaging ("chat"), or Web-based submission forms, usually answered by librarians in the reference department of a library, sometimes by the participants in a collaborative reference system serving more than one institution. http://lu.com/odlis/odlis_d.cfm#digitalref

OPAC—Online Public Access Catalog. Also known as, an online catalog.

Reference service, library—All the functions performed by a trained librarian employed in the reference section of a library to meet the information needs of patrons... http://lu.com/odlis/odlis_r.cfm#refservices

Shared catalog—an online catalog (and circulation system) used by more than one library. Montana boasts several, including: The Hi-Line Catalog, the OMNI Catalog, the Montana Public Access Catalog (at UM), and the Montana Shared Catalog.

Twin Vision Braille— Twin vision print/Braille books are picture books at the preschool through primary grade level. The original standard print edition of the picture book, complete with pictures, is rebound with braille text pages inserted between the print pages. The braille pages are translucent... <http://www.sos.mo.gov/wolfner/publications/manual/chap06.asp>

Union Catalog— A list of the holdings of all the libraries in a library system, or of all or a portion of the collections of a group of independent libraries, indicating by name and/or location symbol which libraries own at least one copy of each item... http://lu.com/odlis/odlis_u.cfm

WebBraille— Web-Braille is an Internet, web-based service that provides, in an electronic format, many braille books, some music scores, and all braille magazines produced by the National Library Service for the Blind and Physically Handicapped (NLS). The service also includes a growing collection of titles transcribed locally for cooperating network libraries. The

Web-Braille site is password-protected, and all files are in an electronic form of contracted braille, requiring the use of special equipment for access.

<http://www.loc.gov/nls/reference/factsheets/webbraille.html>

WebOpac—Web-based online public access catalog.

Z39.50— A client-server NISO standard allowing disparate online library systems to exchange information about library materials.

E-mail glossary additions or corrections to: dstaffeldt@mt.gov