

Memo

To: Montana State Library Commission

From: Jennie Stapp, State Librarian

Date: June 1, 2012

Re: 2013-2018 Library Services Technology Act (LSTA) five-year plan

Every five years the Institute of Museum and Library Services (IMLS) requires each state library to submit a state plan as part of the application process to receive LSTA funds. IMLS defines the state plan as “the document that identifies a State’s library needs, and sets forth the activities to be taken toward meeting the identified needs supported with the assistance of Federal funds made available under the LSTA.”

The State Library asks the Commission to take action on the LSTA five-year plan which is due by June 30, 2012. It was prepared by the State Librarian and staff from Statewide Library Resources. The plan uses data from the State Library 2012-2022 long range planning process and from the 2012 LSTA evaluation report.

Additionally, please note the following:

- The goals of the LSTA plan mirror those of the Montana State Library Long Range Plan that was approved at the April Commission meeting;
- The format of the plan follows the guidelines set forth by IMLS;
- Each goal is aligned with broad LSTA Purposes which were drafted and approved by IMLS.

Montana State Library LSTA Five-Year Plan 2013-2018

Mission

The Montana State Library is committed to strengthening libraries and information services for all Montanans through leadership, advocacy, and service.

Vision

Develop and deliver 21st Century library resources and information services.

Needs Assessment Data Sources

Montana State Library (MSL) developed a new agency-wide long range plan for the period 2012-2022. The process for developing this plan began in November 2010. Needs assessment data was collected through discussion at federation and Network Advisory Committee meetings, Montana Library Association board meetings and 2011 annual library conference, email messages, and meetings with MSL staff. Social media, including the State Librarian's blog, MSL's Facebook page, and a wiki created especially for the long-range planning process, were also used to collect data evaluating the 2006-2011 plan and suggesting direction and new strategies for the agency for the 2012-2022 time period.

The draft of the new plan was presented to the State Library Commission in July 2011. The following months were used to collect further comments from the library community. Librarians, trustees and others were encouraged to review the document, and their comments were used to prepare a final draft for the Commission to consider for action. The Montana State Library Long Range Plan 2012-2022 was officially adopted by the Commission in April 2012 and is available at http://msl.mt.gov/About_MSL/Long_Range_Plan/LRP12-22_Final.pdf.

In addition to the agency's long range planning process, MSL also has data collected during the LSTA five-year evaluation process. The evaluation was done by Communication and Management Services, LLC of Helena, Montana. The report was submitted to IMLS on March 30, 2012. Data sources included:

- Librarian online survey – promoted on statewide library listserv for library leaders and library workers
- General patron online survey – posted on public library websites
- Focus groups – convened for library leaders & workers (three sites)
- Interviews with randomly selected Talking Book Library patrons
- Product-specific user online surveys – posted on websites for Montana Shared Catalog, MontanaLibrary2Go, and Montana Memory Project

During both the evaluation and planning process, librarians, trustees and library users were asked to identify the most valuable library services, programs and products, and to offer suggestions for services, programs, and products needed to improve Montana libraries in the coming years.

MSL is assisted in determining the most pressing needs of libraries in the state by the Network Advisory Council (NAC), whose members represent all types, sizes, and geographical locations of libraries. The NAC makes recommendations to the State Librarian and Commission on planning for technology and setting priorities for statewide efforts.

Input collected from the sources described above provided strong support for MSL to continue use of LSTA funds for:

- content & access
- leadership, training & consultation
- partnerships & collaboration
- content, access & services to patrons with reading disabilities

These goals are identical to those in MSL's previous LSTA plan, but are updated in the narrative below to reflect both the accomplishments made in the past five years and the projected needs for the 2013-2018 time period.

Goal #1: MSL provides consultation and leadership to enable users to set and reach their goals and provides appropriate trainings and training resources so that the best use can be made of the resources offered. This is MSL's number one LSTA goal because of the input received from librarians indicating the importance of MSL being a leader and providing consultation services and training for the library community statewide. In addition, addressing this goal with LSTA funds is the highest priority of MSL staff, Commission members, and the Network Advisory Council as each LSTA budget is prepared.

LSTA Purposes:

Provide training and professional development, including continuing education, to enhance the skills of the current library workforce and leadership, and advance the delivery of library and information services, and enhance efforts to recruit future professionals to the field of library and information services **and** expanding services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages in order to support such individuals' needs for education, lifelong learning, workforce development, and digital literacy skills.

Identified Need and Assessment: Montana libraries need leadership, training and consultation to reach their goals.

In answering the question "What do you see as the role of the Montana State Library?", 76% percent of responses mentioned activities related to this need:

- 41% indicated MSL should demonstrate leadership by serving as a clearing house for information, providing guidance for new projects, representing and supporting libraries in the state, coordinating statewide efforts and having vision for the future of libraries in the state
- 29% of respondents feel MSL's role is to provide training and consultation to help library workers provide quality services

Librarian comments from the survey included: "overseeing all libraries in the state and providing leadership and training to library personnel"; "it should be a source of both leadership and assistance for libraries and their patrons"; "leadership, set the tone for Montana"; "a library of libraries"; "support libraries and librarians throughout the state with

training, consultation & services”; “to help coordinate and guide the work of libraries in the state and oversee programs that impact all libraries”; “as a guiding hand and as a negotiator for library services statewide”; “support, leadership, and education”; “MSL educates us on the latest information & resources available. We then pass it on to the public”; “the hub of the community”; “in a leadership role”; “assistance with training, and helping facilitate communication and collaboration among MT libraries”; “lead us into the future, provide training and help small underfunded libraries”; “the MSL provides professional development to libraries to make sure librarians are up-to-date with all the services they should be providing their patrons”; “like a parent for all the other libraries around the state”; “as a facilitator, to help libraries acquire new knowledge of services and products that we can provide for our patrons”; “being the front runner for all Montana libraries, be there for when librarians need a sounding board, just be the leader for all things library related”; “the umbrella of all libraries: support, information, help, introduction to what is available”; “the state library should have a ‘vision’ for the future of Montana’s libraries and should do everything in its power to ensure that the vision becomes a reality. The state library should be the leader in cooperative projects and endeavors and a resource to librarians of all persuasions, providing answers and consistent advice and information”; “providing thoughtful and intelligent leadership, purchasing power, training, and support to libraries around the state”.

Montana librarians were asked to evaluate consulting services provided by MSL and more than 83% rated these services as useful at some level. Within this group, 59% indicated these services were ‘very useful’ or ‘extremely useful’. When asked if the consulting services were important, 83% of the librarians indicated these services were ‘essential’ or ‘somewhat essential’. One librarian attending a focus group session told the LSTA evaluators “the consultants are really important to small libraries because they don’t have technology people on staff and need a resource”.

Librarians were also asked in the survey about the impact of continuing education and 94% rated the training as useful with 69% of those responses being ‘very useful’ or ‘extremely useful’. Comments included: “maybe try and bring in more regional/national presenters”; “more training on technology”; “more face to face training”; “more training in my area”; “more regular training delivered via web”; “more trainers to serve our extremely large state”; “additional, consistent training for trustees and the legal, social and practical issues that arise”; “have online trainings available 24/7 and be sure they are easy to access”; “more professional development”; “more accessible to school librarians”; “I think the training of trustees needs a lot more attention. I think library trustees in general should get more attention. These local boards control a great deal of the outcome of library services, and yet very often they are not drawn into the fold and given the tools they need to do the vital job they have”. When asked to give an example of MSL training that made it possible to better serve patrons, 61% of librarians responding were able to provide that information. To further document the value of and need for continuing education for librarians, nearly 50% of respondents attended 1-5 MSL training events in the past 3 years, 21% attended 6-10 events, 35 attended 15-20 training sessions, and 5% attended more than 20 MSL workshops or webinars.

A final needs assessment tool that could impact this goal is a feasibility study currently being conducted under the MSL’s Broadband Technology Opportunity Program (BTOP) grant. This

study will be completed in August 2012 and the results will be evaluated to determine if and how BTOP-provided training for librarians can be continued.

Leadership, Training & Consultation Programs: These programs will build capacity within local libraries to provide improved library services. Specifically, these programs will assist librarians and trustees by providing leadership and guidance to move library services forward through statewide initiatives; by providing training to improve skills and abilities of the library workforce to ensure high-quality services for patrons; and by providing consultation and facilitation for library leaders confronting difficult issues and decisions. The primary audience for consultation services is public libraries; all types of libraries will benefit from MSL's leadership and from training offered across the state. The timeline for programs listed below is ongoing during the 2013-2018 period.

1. Provide leadership on critical issues, funding, local policies, promotion, best practices, research, technology specifications, product evaluations, content selections and procurement, etc. LSTA will be used for MSL staff to research and stay abreast of library developments and to provide facilitation and training services to help library leaders envision the future of library services and understand the technology needed to implement that vision.

- seek opportunities for future program planning that will inform and impact the direction of library services through attendance at national conferences and training events
- continue to address recommendations from the NAC on technology planning and priorities for statewide projects
- monitor development of open source products and evaluate if appropriate for statewide efforts
- provide information on technical standards so that statewide access can be coordinated and achieved
- provide information to libraries and trustees about MSL's planning for and implementation of statewide content and access projects

2. Facilitate community leadership, library promotion, outreach services, community-wide planning and assessment. LSTA will be used for MSL staff to assist library leaders with these efforts.

- encourage libraries to form partnerships and become community centers
- help libraries focus on how to best serve the local community by embracing innovation to sustain and expand services
- provide data and compelling stories to insure funding at a level commensurate to the library's mission
- provide assistance (and training as needed) for strategic planning, fundraising, library laws, personnel, controversial issues, and local government relations
- educate library leaders about the benefits of library districts and keep the online district handbook updated

3. Provide consultant services for librarians across the state on relevant topics and technology. LSTA will be used for MSL staff to provide onsite consultation and training

- visit all public libraries annually
- introduce librarians to emerging technologies and the possible impact on

services and patron needs

- continue development of reporting tools such as 'personalized' statistics to help public libraries assess services and document library value
- assist federations with development of plans of service each year and with using outcomes evaluation methods
- collect library materials in both print and digital formats to serve the professional development needs of Montana's library leaders and librarians
- assess needs of library staff for training
- expand and improve MSL's 'for librarians' and 'for trustees' web pages; keep online handbooks for new directors and trustees updated

4. Provide formal face-to-face training opportunities each year that help library leaders and librarians develop and deliver services and programs addressed in the eight LSTA priorities. Provide regular venues for librarians to network, share, discuss, and brainstorm. LSTA will be used for MSL staff to plan and conduct training events and for expenses including facilities, materials and presenters.

- develop and host appropriate library leadership training for library directors and trustees including the summer leadership institute and trustee workshops
- develop and host the annual Fall Workshop for library staff
- continue to receive recommendations from the NAC on training needs and priorities statewide
- provide follow up after training to maximize change in abilities/skills/knowledge from formal training events

5. Expand online/web-based training opportunities, both those developed by MSL staff and those created by others. LSTA will be used for MSL staff to develop and facilitate MSL-sponsored webinars and to locate and promote other online training for Montana librarians to attend. LSTA will also be used for equipment and software for producing and accessing online training

- explore technology to expand online training capabilities
- develop self-paced training for librarians and trustees
- ensure long-term access to online training through archived webinars

6. Provide a clearinghouse for information on conventional and online training opportunities. LSTA will be used for MSL staff to develop and maintain electronic access tools for librarians to locate needed training in desired formats.

- maintain and promote the online Montana Library Event Calendar
- provide a central repository of training materials (handouts, slides, etc.)
- launch and maintain an online training portal that provides information about upcoming training opportunities and on-demand access to recorded trainings

Goal #2: MSL acquires and manages relevant quality content that meets the needs of Montana library users and provides libraries and patrons with convenient, high quality, and cost-effective access to library content and services. This is MSL's number two LSTA goal because of the data received from librarians and patrons about the need for and value of easily accessible electronic resources at local libraries. Both librarians and patrons have

asked for more. This goal is also supported by MSL staff, Commission members, and the Network Advisory Council as each LSTA budget is prepared.

LSTA Purposes:

Establish or enhance electronic and other linkages and improve coordination among and between libraries and entities for the purpose of improving the quality of and access to library and information services **and** develop library services that provide all users access to information through local, state, regional, national, and international collaboration.

Identified Need and Assessment: All Montanans deserve convenient and high-quality access to relevant and high-quality content that meets their information needs.

Librarians across the state were asked, "What do you see as the role of the Montana State Library?" More than one-third (35%) of the responses referenced the role of providing access and/or content to electronic resources. Survey comments confirmed there is a need for the products and services purchased and managed through statewide projects. MSL's role was seen as: "to ensure, at the state and local level, that Montanans have access to free material and that they are being provided with the best services available"; "provide resources and assistance for libraries across the state so that each county can best serve their community"; "developing and coordinating a statewide library system with access for all"; "a negotiator for library services statewide"; "support all of Montana's small and large libraries in bringing accurate information to all Montana's citizens"; "help coordinate projects that could not be accomplished or afforded by a single library (databases, downloadable media)"; "easy and fast access to any library in the State for any materials"; "coordinate the consortial procurement and management of digital content, shared cataloging and resource sharing so that local libraries can provide services beyond what they would be able to do alone"; "helping communities large and small within the state to have access to the latest and greatest with respect to libraries"; "I like how they try to make the best resources available at little or no cost"; "to support public libraries in providing free access to information to library patrons".

Librarians were also asked to evaluate specific content provided statewide to determine both the use and value of these products. The results show an average of 42% of respondents 'use or help patrons use' content like the online periodical database, downloadable audio/e-books, auto repair manuals, homework assistance, genealogy resources, and Montana-specific documents. In addition, 63% of librarians ranked these products as either 'essential' (28%) or 'very valuable' (35%). Changes suggested for statewide content indicate that more and improved online resources are highly desired by librarians: "MontanaLibrary2Go is desperately inadequate for meeting demand and the Testing and Education Reference center is sorely missed"; "I would have programs that are easier for the general public"; "user-friendliness is essential -- it doesn't make sense to have a database that frustrates staff and patrons rather than helps them"; "adding more resources suitable for children would be wonderful"; "I would like to see more family/children centered tools or products"; "amount of book copies available on MontanaLibrary2Go needs to be increased for adult readers"; "I would add Novelist"; "I would love to have a foreign language component. Our patrons are asking for an online language help but we do not have the funds individually to make this happen"; "the Mango languages program might be an interesting addition"; "e-books are awesome"; "downloadable audio content helps students with learning disabilities access books for school and recreational reading"; "the new databases for kids homework help have

brought a lot of younger people to the library”; “a lot of times native students will go home for a family issue, and there is the potential for them to go into a local library and use the database there. We have kids that are so mobile – maybe in a classroom for 2-3 months -- that when they can access the same database at a different site, it really helps the kids move into the new school”.

Librarians also answered questions about the use and value of access tools. For OCLC products (WorldCat, FirstSearch, ILL), 63% of respondents reported that they ‘use or help patrons use’ these tools and 65% rank the value of these tools as ‘essential’. The Montana Shared Catalog (currently with 160+ library members) is seen as ‘essential’ by 41% of respondents and as ‘very important’ by 20% of librarians completing the survey. In addition, 80% of librarians surveyed believe that MSC improves services at their libraries. When asked how participation in the shared catalog changed their library, librarians responded: “because we participate, our students have the same access as any college or university”; “now our patrons are much more satisfied – even though this is a small library, they are likely to find the materials they need through us and we have consequently increased our number of patrons, including having signed up some long-time residents who had thought the library was not very useful”; “being part of the MSC has increased our library collection to nearly 1/2 million items”; “ease in locating material, ability to provide prompt response to patrons, access to books and materials not in our library, and a very useful tool in weeding the collection”; “our patrons have access to thousands of materials that they could not otherwise use and cataloging is immeasurably easier and quicker”; “MSC is the engine that runs our library – literally. Without MSC behind us we would not be able to deliver the services we do”; “MSC provided us with a dynamic catalog with a solid, online presence that we were unable to provide our patrons with previously. It is an essential part of our patron offerings – literally opening the doors to over one million items available for sharing and use”; “LSTA funding used to help libraries join the MSC are essential. Helping libraries with limited budgets become part of a state wide library system will strengthen our library community and promote awareness of our citizens. It is essential that all citizens have access to information”; “our patrons rely on these services because our area is rural and isolated. They are not always able to get to their library and are very appreciative that library services can be accessed in their own home.” Librarians did express some concerns about access tools during the focus groups as reported by the LSTA evaluators: “not all users understand the SirsiDynix system due to its function different from a browser and what they are used to, and this creates problems”; “integrated library systems aren’t keeping up with what users need and expect, despite a significant investment”.

Other comments from librarians concerning access to materials related to a courier service for the state, an effort MSL applied LSTA funds toward recently as a pilot project. A high percentage (76%) of the librarian survey responses ranked the pilot courier project as ‘valuable’. This figure included 23% ranking it as ‘very valuable’ and 25% as ‘essential’. Comments from librarians included: “MSC opened up resources, but we desperately need a delivery service to help serve all patrons”; “the courier pilot is vital. Although we are becoming an electronic world, there is still a heavy reliance upon hard copy. In Montana it is difficult and expensive to share in any other way”; “if the state library could provide one courier that everyone would be able to choose to join or not I believe this would provide the most cost effective choice, offering access for all”; “I would add a better courier service throughout the state”; “the courier is the one service that we need to get funded”; “the courier was a good

idea, but was not able to fairly serve all libraries, therefore needs to be rethought”; “the courier project saved the library \$1200 in postage this past year”; “the lack of a state courier program has made it difficult to use Ready 2 Read trunks and kits.” The courier project was also a topic during the focus group sessions and the LSTA evaluators reported that participants “expressed the need for a statewide courier program in support of non-digital material transport”.

Other data collection tools used in the 2012 LSTA evaluation included a general public library patron survey (posted on a few public library websites) and product-specific user surveys (posted on the homepages for these products). Though the number of responses was small (49), it was the first effort to collect direct patron/user data for an LSTA evaluation report. Patrons were asked if the online resources available at the library met their information needs and 25% responded ‘always’ and 65% responded ‘frequently’. When asked if accessing online resources was convenient, 73% ‘agreed’ and 25% ‘somewhat agreed’. The data indicates that an average of 32% of patrons ‘use’ the products (audio/e-books, periodical database, auto repair manuals, genealogy resources, homework assistance, Montana-specific documents) at their local library and 40% are ‘aware, but do not use’ these products. 58% of the patrons answering the survey find these products ‘very useful’ and 28% find them ‘somewhat useful’. Comments from patrons about the impact of library resources on the patron, family and community included: “the library provides my family with almost unlimited access to books, movies, music and lots of information unrelated to entertainment”; “I love being able to access the library online, so I am not using gas to get there”; “I love having access to e-books. With the growth of technology, it is very helpful to have these books available in this format”; “I always feel incredibly rich when in the library”; “the library resources are invaluable in our community because it gives us access to things free of charge and unavailable unless you drive 45 miles”; “spend more time as a family”; “because of the library, I have been able to educate myself on numerous subjects of interest that I would otherwise be unable to”; “appreciate the availability of information at any time of day or night. Makes completing homework assignments, research, etc. convenient”; “these are vital resources for a literate, educated community”; “I love the fact that I can do so much online. Put books on hold, renew books, check to see if there is a copy available”.

Patrons were also asked to describe the one service offered by the library they valued most: 32% cited the online catalog and the capabilities it provides to place holds, do ILL, renew an item, check item availability, and review patron accounts from any computer; 17% cited downloadable audio/e-books; and 13% said being able to check out books was the most valued library offering. When asked what they would change about the library comments included: “update downloadable audiobooks more often”; “more online audiobooks available for Mac!”; “more ebooks”; “spend the friends and foundation money on resources like ebooks and forget the jazz!”; “more focus on materials”; “I would love to have access to Novelist to find new books to read”; “larger book selection”.

Key recommendations from the LSTA evaluators addressing the need for content and access include:

- MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago;

- MSL should continue to use LSTA funds in programs that support bringing physical materials to the library location;
- MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries; and
- MSL should use evaluation data (including complete data beyond what is listed in the evaluation document) to explore patron/librarian use of specific LSTA-funded products and services in those areas where survey data show evidence of the product and service improving library services.

Content and Access Programs: These programs will assist libraries with providing electronic content and easy and reliable access to those resources for their patrons. The primary audience for content is public libraries; all types of libraries will benefit from efforts to enhance access. The timeline for programs listed below is ongoing during the 2013-2018 period.

1. Continue and extend statewide e-content purchase programs to cut costs and provide materials/services libraries would not be able to afford individually. LSTA will be used for MSL staff to investigate new products, negotiate statewide discounts, implement new products in libraries, provide training for librarians on utilizing the new resources, and produce marketing materials for libraries to locally promote the expanded resources. LSTA will also be used to purchase new products for pilot projects designed to determine use and value.

- explore expansion of MontanaLibrary2Go resources to school libraries
- continue to add libraries by phases to MontanaLibrary2Go
- explore additional vendors and formats for MontanaLibrary2Go growth
- begin delivery of e-government resources developed by MSL through MontanaLibrary2Go
- investigate possibility of providing new electronic resources such as foreign language and reader's advisory programs
- expand use of HomeworkMT by librarians and patrons
- continue to solicit input and recommendations from the NAC on priorities for statewide content projects

2. Support the goals of the Montana Memory Project strategic plan to increase local content and improve management of these online resources. LSTA will be used for MSL staff to provide assistance and training for libraries adding unique historical materials to MMP. This will include materials selection, arrangement, description and digitization. LSTA will also provide high-quality digitization equipment for libraries to use.

- continue to work with partners to locate content, promote use of MMP, and coordinate efforts for a theme-based approach to adding resources
- explore and evaluate available platform alternatives for developing and accessing digital materials
- provide MMP participants with financial support for digitization projects
- use appropriate technologies and methodologies to increase access to information about Montana that is created and/or maintained by library partners

3. Expand availability and use of statewide integrated discovery and searching tools and centralized authentication services to libraries and patrons. LSTA will be used for MSL staff to research and evaluate existing and beta products, negotiate statewide discounts, train

librarians and patrons in use of existing and new products, and develop materials to promote use of the tools across the state. LSTA will also be applied to costs for statewide licenses and to add additional catalogs and other resources.

- promote and increase use of statewide integrated discovery and central authentication tools and services
- expand number of libraries able to offer one-stop search box capabilities
- implement additional catalogs/resources within a statewide discovery system to expand the resources searchable within the system
- develop interoperability between disparate catalogs utilizing industry protocols such as NCIP and other standards
- actively investigate and implement web-scale solutions such as cloud computing, centralized indexing, and harvesting of content

4. Expand and improve the Montana Shared Catalog by including more libraries and more resources and by providing Montanans with continued self-service, machine-mediated access over the open Web. LSTA will be used for startup costs for new MSC members and to provide management and support for the catalog by MSL staff.

- encourage libraries to apply for startup funds to become a member
- work with the MSC Executive Board to administer the catalog
- respond to member needs for technical assistance and training
- explore the possibility of expanding MSC regionally, beyond state boundaries
- investigate and evaluate alternative platforms as appropriate

5. Explore opportunities to improve Internet access and technology support for libraries. LSTA will be used for MSL staff to make recommendations for partnerships with state agencies and other organizations involved with access to electronic resources. LSTA could also be used to assist libraries with enhanced access when appropriate.

- evaluate the results of a feasibility study conducted under MSL's Broadband Technology Opportunity Program (BTOP) grant
- evaluate venues for sustaining Internet services
- explore ways to increase library capabilities to provide fast and reliable access to patrons
- assist rural libraries with finding cost-effective technical support
- continue assisting libraries with e-Rate applications

6. Design and expand projects to demonstrate how materials can get to a patron quickly and efficiently at an affordable price regardless of what library owns the items. LSTA will be used for MSL staff to explore new options and expand existing structures, continuing to develop methods of addressing cost-efficient ways to transport materials between libraries. LSTA may be used to implement pilot projects to demonstrate possible solutions to this fulfillment issue.

- evaluate results and impact of current project using Critelli Couriers
- evaluate the economy of scale gained by participation in regional courier programs to determine if a partnership creates economic efficiency
- determine cost savings to libraries of cooperative courier systems
- facilitate the growth of direct document delivery options
- assist with coordination between libraries and vendors

Goal #3: MSL promotes partnerships and encourages collaboration among libraries and other organizations to expand and improve services to patrons. The goal is MSL's number 3 LSTA priority, but its importance is not to be minimized. Partnerships and collaboration are part of every goal in both the MSL long-range plan and the LSTA five-year plan described here.

LSTA Purposes:

Develop public and private partnerships with other agencies and community-based organizations **and** develop library services that provide all users access to information through local, state, regional, national and international collaborations and networks.

Identified Need and Assessment: Libraries must form partnerships and collaborate so that patron information needs can be met.

A recommendation from the LSTA evaluators was that "the MSL continues to view community-based libraries as their partners and share data as such."

One ongoing library partnership/collaboration is with the Network Advisory Council which makes recommendations to MSL for statewide efforts, including those involving collaboration with the Montana State Legislature. The NAC supports continued legislative funding for the statewide periodical database (with an inflationary increase) and for the OCLC statewide contract so all libraries can utilize these products at no additional cost.

In the 2012 survey, librarians commented on the importance of MSL's role to collaborate with state government, vendors, and others to bring the products, tools and services that meet the information needs of Montanans: "LSTA should be used to make a cohesive state wide library system, it should be a goal of all Montana libraries to share resources and materials with each other"; "I would like to see an increased focus on the importance of the partnership between local public libraries and other libraries with MSL, using LSTA and other funding to enhance service to Montanans. This partnership will continue to move more extensively into the production, licensing, organization, provision of access to digital information, as well as training for staff and end-users on how to access, evaluate, and use it"; "the cost effectiveness of products like MTLibrary2Go is great"; "MSL's role is coordinating with other state agencies to provide library services to residents".

As reported by the LSTA evaluators: "One of the most frequent comments from focus group sessions was the lack of high speed internet in regions of the state, and the difficulty accessing many of these LSTA-funded programs due to this. Comments from focus groups mentioned the use of LSTA funds to solve coverage programs, yet the cost remains high. Coordination between state agencies should continue as availability impacts every aspect of both public and private sector operations." In the librarian survey, one comment received concerned this issue: "we now have a broadband access map, and the State needs to build the infrastructure".

Some survey responses focused on a specific collaborative project, the Montana Shared Catalog: "one of the most important aspects of the MSC is that it creates an infrastructure for sharing among libraries. MT is rural and we need to support each other. With the MSC and what Partners have done to share resources have made it a lot easier than if we were on separate systems"; "the communal view of what the libraries provide, the partnership makes

constituents feel their tax dollars are being spent wisely and that they are giving back to the community”; “the cost savings to libraries is tremendous, you don’t have to buy as many copies of popular fiction. The materials we pay for are used by the entire state”; “strengthen the cooperation among the different types of libraries”; “the MSC may provide ability for future partnership and increased sharing, something that could really benefit our patrons”; “everyone chips in to help each other out – the MSC really has built great bridges between libraries throughout the state.”; “the shared catalog should evolve into a statewide library sharing system: 100% participation and seamless sharing across one system. MSL should champion such a model, as it would be of the most benefit to ALL patrons across the state. No exception, no library or patron excluded.”

Librarians also expressed an appreciation of and need for collaboratively created programming and promotional materials that can be used and customized by individual libraries. In the librarian survey, 61% reported using program ideas and materials from the Ready 2 Read (R2R) early literacy project, 46% used the Goes Wild! nature trunks, and 73% offer summer reading programs. When asked about the value of these collaborative programs, 37% ranked R2R as ‘very valuable’ and 33% as ‘essential’; 42% ranked the Goes Wild! trunks as ‘very valuable’ and 32% as ‘valuable’; and 21% ranked summer reading programming as ‘valuable’ and 55% as ‘essential’. Comments about collaborative programming included: “it takes time to develop each program. MSL coordination makes it easier to provide more resources and programs to patrons efficiently”; “a good example is the increase in participation in our early literacy programs because of these resources. And the summer reading program materials are things we couldn’t do without”; “participation in the programs has increased library use exponentially”; “provides a higher quality of service”; “working in the children’s department I have found both the Ready 2 Read and summer programming to be incredible resources. Both very helpful and supportive. They have helped me to provide better programs for our patrons”; “our programs for children and families have been greatly enriched through the use of R2R materials and summer reading materials. They provide creativity and diversity as well as save on valuable staff time”; “with them, we reach so many families and help so many young people learn to read”; “having the programs available throughout the state and not just at libraries that can afford it through their regular budgets is valuable”; “it has increased literacy awareness in the entire community”; “within one week after returning from the R2R rendezvous we had people coming in and sitting down to play with the blocks ...we serve many low income families and it’s been great to see the parents sit down and play with their children, instead of heading directly to the computers”; “very popular program is early literacy programs. It brought libraries together to share what is done for early literacy”.

In addition to the survey data, the LSTA evaluators reported that at each focus group session participants cited cooperative programming as needed for literacy promotion for emerging readers. This is an important need as Montana’s percentage of the population lacking basic prose literacy skills stands at 9%.

Partnerships and Collaboration Programs: These programs will enhance established collaborations and create new partnerships with libraries, state and regional agencies, and other organizations. The primary audience for these programs is public libraries, but all types of libraries will benefit from these partnerships and collaborative efforts. The timeline for programs listed below is ongoing during the 2013-2018 period.

1. Expand membership in the Montana Shared Catalog and promote electronic sharing of resources and collections. LSTA will be used for MSL staff to encourage and facilitate expansion of sharing within MSC.

- develop a shared collection management policy and floating collections for MSC libraries
- facilitate members becoming official participants of MSC sharing groups

2. Continue to partner with library vendors to extend statewide e-content purchasing programs and access tools. LSTA will be used for MSL staff to explore new products and negotiate statewide vendor discounts. [see goal #2, program #1 above]

- continue to build relationships with library vendors that focus on statewide purchasing and scalability options
- expand existing subscriptions and products to meet needs statewide
- coordinate the process of renewing existing or purchasing new statewide databases and discovery platforms and implement contracts with selected vendors

3. Continue and expand Montana Memory Project (MMP) partnerships to enhance quantity and quality of digital content. LSTA will be used for MSL staff to explore and establish partnerships for MMP.

- partner with Montana Historical Society, University of Montana, Montana State University, Montana Preservation Alliance, Montana History Foundation and other related organizations to increase the amount of content in and use of the MMP
- work collaboratively toward developing, managing, presenting, and preserving Montana-relevant digital content for statewide presence
- work with partners to develop a theme-based approach to digitizing materials for a more organized approach to building the collection

4. Continue to develop programming materials and tools for libraries to use and continue to partner with other state agencies and organizations for funding and promotion. LSTA will be used for MSL staff to develop life-long learning programs and program materials for public libraries to adapt and use in the local community. LSTA will also be used for printing of materials and purchasing books and other items to be used for local programming efforts.

- develop statewide programming for libraries to adapt and use locally
- expand early literacy programming for libraries
- provide materials (books, blocks, manuals) in support of life-long learning programs
- provide training to help librarians implement new programs
- explore development of new 'companion' resources including a recreational or agricultural series
- develop and make available marketing materials libraries can use to promote new programs being offered locally

5. Continue work with established courier services to find an efficient and affordable system to transport materials between libraries. LSTA will be used for MSL staff to work coordinating partnerships between courier services and libraries. (see goal #2, program 36 above)

- continue to explore partnership with existing courier services to

determine feasibility and cost savings for statewide transport of materials
-continue to facilitate and expand MSC partner's courier arrangement

6. Explore and expand partnerships with Montana Library Association, Montana Association of Counties, Geographic Information Professionals, AARP, state agencies, Internet providers, foundations, health care organizations, library schools, etc. to determine how these partnerships might be mutually beneficial to libraries and the organization in achieving similar goals and objectives. LSTA will be used for MSL to connect with appropriate organizations and work to establish a connection on appropriate library initiatives and needs.

-continue to foster relationships between BTOP partners and libraries and make partner materials and training resources available to all Montana libraries and patrons

-encourage partnerships between libraries and local geographic information professions to use geographic information systems to analyze and improve upon the impact of library services

-educate local officials about the benefits of library services

Goal #4: MSL acquires, manages and provides access to quality content for Montana Talking Book Library patrons and provides outreach services through partnerships and collaborations with other organizations that provide special needs patrons with the information they need. This is not truly the number four goal for MSL. In the agency's long-range plan, the MTBL program is included as a contributor to each goal, not as a separate goal to be accomplished independently. However, because there is an LSTA purpose for services to the disabled, the MTBL program is highlighted in the LSTA 5-year plan as a separate goal. As described below, MTBL initiatives address content and access; leadership, consultation and training; and partnerships and collaboration – all of MSL's goals for the 2013-2018 period.

LSTA Purpose:

Target library services to individuals of diverse geographic, cultural, and socioeconomic backgrounds, to individuals with disabilities, and to individuals with limited functional literacy or information skills.

Identified Need and Assessment: Montanans with visual, physical or reading disabilities need information in special formats using specialized equipment.

Statistics from the National Health Interview Survey show that in 2010 there were 5.4 million Americans ages 65 and older who reported experiencing significant vision loss. According to the American Council for the Blind, 22,000 Montanans are in this group, a number that grows as the state's population increases and ages. The Montana Talking Book Library program (MTBL) is now serving approximately 18% of these citizens.

From the focus groups, the LSTA evaluators reported that librarians "cited both audio books and downloadable e-reading materials as increasingly popular with an aging population"; have experienced that "individuals over age 50 are enthusiastically using e-readers due to their ability to adjust text size and read without the frustration they had previously experienced due to reduced eye sight"; and that they "see baby boomers transitioning into needing greater reading assistance in the next decades". Information gathered by MSL staff during interviews with individuals applying for (or returning) to MTBL services indicated that

patrons who have used commercial large print capable e-readers (Kindles, Nooks, etc.) experienced frustration with limited font size and vision fatigue. Users were also dissatisfied with the text-to-speech feature of some e-readers, expressing a strong preference for voice-recorded books. Additionally, there were concerns about the cost of purchasing titles and that the user could not actually 'add' the book to their personal library. This information from patrons further documents the need for the MTBL program to continue providing equipment and materials in formats especially developed for individuals with reading disabilities.

The 2012 survey asked librarians about their familiarity with the MTBL program and services. Responses indicate that 30% have "good knowledge" and 50% are "somewhat knowledgeable." Clear differences surfaced based on the type of library responses. For public librarians who answered the survey, 60% had a "good understanding" of MTBL services and 43% were "somewhat knowledgeable." Academic, school and special librarians had a combined 22% 'good understanding' and 50% were 'somewhat knowledgeable'. Referral statistics to MTBL services reflect similar statistics: 85% from public libraries and 36% from other types of libraries. Only a small percentage of librarians reported patrons using library computers to download free materials from the MTBL program: 12% in public libraries and 3% in other library types. In the general patron survey, 4% of public library users who responded were 'aware and use' MTBL services; 64% were 'aware but do not use'; and 32% were 'unaware' of the program.

In a 2011 survey, MTBL users were asked what they liked best about the new digital players. The top responses were having books available on a single cartridge, the smaller/lighter equipment, ease of use, improved sound quality, and longer battery life. When asked about downloading books from Braille and Audio Reading Download (BARD), 38% reported not having access to a computer and/or the Internet. The limited use of BARD is also documented in MTBL monthly reports which indicate that only 10% of patrons download library materials due to lack of personal resources for Internet access and adaptive computer hardware/software, as well as the need for training and on-going technical support.

The LSTA evaluators interviewed 31 MTBL patrons selected randomly and reported that 91% rated the program as either 'very valuable' or 'essential'. When these patrons were asked about equipment and formats, the expressed preferences were fairly evenly divided between tapes and digital recordings, but 68% of interviewees were actually using both. In the interviews, patrons mentioned the value of book clubs in an assisted living setting for a healthy social, mental and physical lifestyle, and expressed appreciation for the Montana books that are recorded and available. Comments included: "always read a lot over the years ... and when I lost my sight I was really lost. It has been great"; "my quality of life is so much better ... I've always had a novel beside the bed since I was a kid, and then when I couldn't do that I was lost. And then when I got hooked up with the MTBL it totally changed my life"; "in general, the state does not do as well funding programs for the blind in rural areas, but MTBL is good"; "it is great when they come in the mail, especially on a snowy day, they bring the books to me"; "this is helpful as can be. I am 96 years old and about sick of the politics on the TV and so best to listen to a good book"; "I can't read anything, so it is essential"; "my only intellectual outlet"; "this allows me to live a full life. Without reading, your life is in no way as full. My life wouldn't be the same if it weren't for reading"; "it has changed my quality of life. It has taken up many many lonely hours"; "when you get those books, I get right into it and it's like you are there with those people; they keep you company"; "this is a

big part of my life”; “the program is highly essential to a rural state”; “it is lifesaving”; “talking books impact the quality of life by enhancing daily living”; “I can listen to it while I am baking or doing chores”.

An issue closely impacting MTBL services involves recent changes in the U.S. Postal Service which delivers equipment and materials for free to patrons across the state. This is of particular concern in rural areas with closed post offices and decreased number of sorting and distribution centers. In the 2012 interviews done by the LSTA evaluators, 19% of the patrons had experienced problems with postal delivery of MTBL materials, but 68% indicated there were no problems with delivery of materials by mail. However, MSL staff has monitored the impact of the USPS changes and from December 2011 through February 2012 received nearly 3,000 calls from MTBL patrons reporting delayed delivery of requested materials. This information was shared with the Postmaster General when he visited Montana and heard testimony about proposed agency changes. MSL staff have made adjustments so patrons do not run out of books including direct delivery of outgoing materials to the local post office (in addition to using the state’s mail processing center) and sending fewer books to patrons more frequently (rather than one large mailing per week).

A key recommendation from the LSTA evaluators involves the MTBL program: “The Talking Book Library patron group is diverse, and many will find a seamless transition as the MTBL program embraces other delivery systems beyond cassette and digital materials, yet MSL should maintain access to all formats through archived materials”.

Talking Book Library Programs: These programs will expand and improve services to Montanans who cannot read standard print materials due to blindness, low vision, a physical or reading disability. The timeline for programs listed below is ongoing during the 2013-1018 period.

1. Continue digitization of recorded Montana materials. LSTA will be used for MSL staff to oversee transition to digital format and to purchase software, digital cartridges and containers.

- transition books previously recorded on tape to digital format
- produce all new Montana book titles digitally from recording to duplication
- begin transition of selected Montana magazines to a digital product for patrons
- train staff in transition procedures, including navigational and procedural markup and exportation, to achieve a high-quality product

2. Continue to stay current with accessible technology available from NLS and NLS-approved providers. LSTA will be used for MSL staff to receive training in new technologies and to assist patrons in using these tools.

- participate in pilot testing of new NLS modalities
- orient and train staff to new modalities available from NLS and collaborating partners
- offer staff hardware and software instructional support tools to assist patrons in use of new technologies

3. Continue to update Keystone Library Automated System (KLAS) database as new versions become available. LSTA will be used to purchase KLAS upgrades and provide

system maintenance. LSTA will also be used for training MSL staff so that system improvements and features can be fully utilized for patrons to access MTBL resources.

- incorporate automated subject coding from Library of Congress
- do electronic transfer of patrons between participating KLAS libraries
- create automatic patron listservs for enhanced patron communication
- improve WebOpac functions for easier searching and direct BARD download capabilities
- create automated mail cards for title Duplication on Demand for patron reserves and requests

4. Implement a Patron Outreach Project (POP) to reach all eligible Montana patrons. LSTA will be used for MSL staff to coordinate the project and to produce promotional materials for distribution.

- contract with a vendor for the POP and develop a one-year plan to launch the project
- create a long term, sustainable statewide volunteer training and media campaign in collaboration with organizations, clubs and community leaders
- develop a "train the trainer" program to create a core of volunteers to promote MTBL services to residents in the community
- utilize radio, TV and newspaper ads, social media and other types of advertising (AARP newsletters, senior news and magazines, etc.) to maximize awareness of MTBL services
- partner with public libraries to include a direct link on library websites to MTBL resources
- assist public libraries interested in assisting patrons with BARD downloads
- develop and implement an outreach program about MTBL services to academic and school libraries in rural locations

5. Increase the amount of accessible materials to individuals who cannot read standard print. LSTA will be used for MSL staff to implement these activities and to purchase equipment and materials.

- collaborate with NLS to offer newest technologies for patrons, including applications for smart phones and other devices
- implement a sustainable Duplication on Demand system for BARD titles and have available on digital cartridges for non-BARD patrons
- collaborate with NLS to synchronize the BARD titles to MTBL's system for more efficient Duplication on Demand
- place multiple magazines on a single digital cartridge for patrons subscribed to national magazines and evaluate system for Montana magazine distribution
- collaborate with the NLS contracted multi-state centers to increase digital ILL's to give patrons access to additional titles not selected for Duplication on Demand
- offer and train patrons on access to and use of audio phone and downloadable Newsline™ newspaper services
- collaborate with other talking book programs on interlibrary loans
- transition local recording program of Montana materials to digital format
- deliver e-government resources development by MSL through MontanaLibrary2Go

- train patrons on BARD's expanded search capabilities; NLS foreign language and music collections; and the availability of local recordings from other states for ILL, download, or Duplication on Demand
- continue monitoring of USPS to ensure patrons receive materials in a timely fashion
- continue to provide materials in a variety of formats to meet the needs of all patrons

6. Continue existing partnerships with organizations serving Montana citizens with visual, physical and reading disabilities to coordinate efforts and increase awareness and use of MTBL services. LSTA will be used for MSL staff to perform ongoing outreach efforts and for creation of promotional materials about the MTBL program.

- continue and expand partnerships with Montana Optometric Association; Montana Academy of Ophthalmologists; Blind and Low Vision services; Vocational Rehabilitation services; Montana School for the Deaf and Blind; Montana Health Care Association; Veterans-VIST program; local chapters of the Montana Association for the Blind; Low Vision Montana; Parents, Let's Unite for Kids (PLUK); and appropriate community groups (Lions, Rotary, AARP, Chamber of Commerce, Retired Federal Employees)
- collaborate with all Montana public libraries to offer continued referral services to MTBL patrons
- continue and expand partnerships with para-professional eye-care associations, nursing associations, hospice groups, kidney dialysis units, in-home care givers, etc. to encourage perspective patrons to seek MTBL services
- provide MTBL information booths and make presentations at meetings of these groups
- implement direct outreach program to individual medical eye care professionals and county health departments to reach individuals as early as possible in the visual loss process
- participate in county health fairs, county fairs, senior centers, retirement facilities, and other local community events

Coordination Efforts

The Montana State Library will continue to work closely with other state agencies and offices to coordinate resources and programs. This includes:

- the Montana State Legislature which supports libraries and provides funding for electronic resources statewide;
- the Department of Administration, Department of Labor and the Department of Public Health and Human Services which have provided resources, training and expertise as part of the BTOP initiative, workforce recovery efforts, and library leaders' understanding of budgeting and fiscal responsibilities;
- the Department of Fish, Wildlife & Parks for training and Goes Wild! resource trunks to support early literacy and for assistance with patron initiatives such as the Montana Hunting and Fishing companion websites;
- the Office of Public Instruction which supports Montana's school libraries and assists with statewide projects available to schools such as OCLC tools and Montana Shared Catalog membership; and

-the Montana Historical Society which is a partner in the management and promotion of the Montana Memory Project for digitization

The MSL staff and Commission members are vigilant in protecting LSTA funds from being used to pay for library products, tools, or services that have historically been included in state appropriations. The role as watchdog is an important one as the State Librarian works through the Governor's Executive Planning Process as each state budget is prepared.

Evaluation Plan

The LSTA evaluators provided some suggestions for evaluation during this five-year plan:

- “Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level.”
- “While questions on the TBL survey asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive – these are important questions to ask in future surveys/interviews.”
- “The following evaluation period should include an analysis of MSC in both urban and rural libraries.”

Evaluation will be an ongoing activity. MSL staff will continue to design and implement outcome-based evaluation tools such as assessments, surveys and interviews to measure the impact of selected LSTA-funded projects. This data will be included in the annual State Program Reports as appropriate. Input will also be solicited from the Network Advisory Council to determine if both the specific LSTA projects and the general five-year goals are being achieved as outlined in the plan. The NAC's input will be used in the informal annual review done by MSL staff to determine what goals have been met, what challenges are being faced, and what adjustments need to be made in the plan.

In addition to these ongoing activities, a formal evaluation will be done as required by IMLS. Prior to the end of the five-year plan, a contractor will be selected through the state's bidding process to conduct a thorough and independent evaluation of the plan. The evaluation will include input collected from all stakeholders and this data will be included and interpreted in a written report. The completed report will be made available to all Montana residents and be submitted to IMLS for review and comment.

Stakeholder Involvement

The State Librarian established a planning committee to develop MSL's long-range plan for 2012-2022 consisting of staff members and Commissioners. All staff was encouraged to participate in the planning process through a wiki set up for that purpose. The library community was also invited and repeatedly encouraged (through email, the MSL website, and various meetings) to provide MSL with ideas, suggestion, projects, goals, activities, etc. Stakeholder comments were given careful consideration as the long range plan was drafted, presented to the Commission, reopened for comment, and then finalized.

The LSTA evaluation solicited information from librarians and patrons offering the opportunity to reflect on what has been accomplished and what needs to be done. This input is the

foundation for determining what MSL and LSTA are committed to accomplishing in the next five years.

The LSTA Five-Year Plan 2013-2018 was drafted by a planning committee consisting of the State Librarian and SLRD staff from the Library Development and Talking Book Library departments. Using data from both the long-range planning process and the LSTA evaluation report guaranteed that all key stakeholders – librarians, trustees, library users -- were involved in the development of the five-year plan. The draft plan was submitted to the Commission for review, comment and approval.

The Montana State Library will ensure that the execution of the five-year plan is coordinated with the agency-wide long range plan and remains in compliance with the LSTA purposes. It will also provide additional opportunities for library leaders and library users to comment on the progress of meeting LSTA goals as described in this plan. One ongoing venue for making comments is through the members of the Network Advisory Council, who represent a particular size and type of library from each geographic area of the state.

Communication & Public Availability

Once the new five-year plan is approved by IMLS, it will be posted on the MSL website where it will be available to all academic, public, school, and special libraries and to all Montana library users throughout the five-year period. The plan will also be presented to trustees and librarians from all types of libraries at federation meetings in fall 2012. In addition, MSL staff will provide updates on programs and projects at all library federation meetings during the 2013-2018 time period.

The message to stakeholders will be that the plan is a working document designed to guide MSL in making efficient use of LSTA grant funds to the benefit of all Montana citizens, with a continuing emphasis on statewide efforts. Descriptions of the data used and the role stakeholders played in the planning process will be included in the message.

Librarians and library users will be invited to submit comments about the plan to the State Librarian (telephone, email, blog, Facebook) and the Commission members (telephone, email, regular meetings). Librarians are also encouraged to contact their representative on the Network Advisory Council. Feedback from all stakeholders will be given careful consideration and comments will be kept for use in the event that changes to the plan are considered during the five-year period.

The LSTA evaluators addressed communication: “The relationship between the MSL and regional libraries is arranged to share data and information and seek community-based input in decision making.” A key recommendation in the evaluation report was that “MSL should continually evaluate its outreach campaign to make all libraries aware of programs and services.”

Monitoring

The implementation of the LSTA Five-Year Plan will be subject to regular and ongoing monitoring by MSL staff as assigned by the State Librarian. Progress reports on meeting the plan’s goals will be prepared and presentations will be made to the Commission and the Network Advisory Council as required. NAC members will be asked to share LSTA updates

with the librarians they have been asked to represent. In addition, MSL staff will provide updates on programs and projects to librarians and trustees attending library federation meetings each spring and fall.

Results of the plan will be reported to IMLS as required and to stakeholders as appropriate. IMLS will receive the State Program Report each year providing details about MSL's program activities and describing progress toward meeting the plan's goals. Stakeholders will be informed using a combination of library publications, the statewide library listserv, federation meetings, and MSL annual reports.

If corrections or updates are determined to be necessary, these will be introduced to the Network Advisory Council because of its role in making recommendations about statewide projects and priorities. NAC members will be asked to assist with notifying the stakeholders they represent of substantial changes in the direction of the LSTA program in the state. Stakeholders will also be informed of changes using the library listserv, MSL website, federation meetings, and social media tools.