

Memo

To: Jennie Stapp, State Librarian **To:** Montana State Library Commission

From: Sarah McHugh, Director
Statewide Library Resources **From:** Jennie Stapp, State Librarian

Date: March 20, 2015

**Re: Recommendations from the Network Advisory Council meeting of
March 10, 2015**

The Network Advisory Council at its March 10, 2015 meeting approved the following recommendations to be forwarded to the State Library Commission:

Recommendation #1: Council recommends that the unassigned balance of \$17,268 in the FY 14 LSTA Statewide Projects budget be assigned to the FY 16 OCLC WorldShare Interlibrary Loan cost that the State Library has committed to cover under the new OCLC Group Services Contract, to reduce the amount of FY 15 LSTA needed for this statewide project.

Recommendation #2: Council recommends acceptance of five new applicant libraries into the Montana Shared Catalog (MSC). Those libraries are:

Chouteau County Library
Chester, Joplin & Inverness (CJI) School District
Fairfield Public Library
Garfield County Library
Roundup Elementary School Library

Recommendation #3: Council recommends approval of the FY 15 LSTA Statewide Projects budget as proposed by the State Library in the attached spreadsheet. The programs, projects and services listed in the budget are:

FY16 OCLC Group Services:

- OCLC WorldShare Interlibrary Loan: In addition to the resource sharing funds derived from the Coal Severance Tax (formerly distributed as Interlibrary Loan

reimbursement), this LSTA funding would completely cover InterLibrary Loan services for libraries enrolled in the OCLC Group Services contract.

- Contribution Toward OCLC FirstSearch Seats and Unlimited Cataloging: This amount would be applied toward the total cost of the Unlimited Cataloging subscriptions within Group Services, reducing overall enrollment costs to libraries.
- FY16 OCLC Group Services Potential Gap: This amount would cover a probable gap between cataloging dues collected from libraries and the amount owed OCLC for Unlimited Cataloging and FirstSearch.
- CONTENTdm software is what makes the Montana Memory Project a reality. This software allows contributors from across the state to create digital collections, create and add record metadata, and upload their content to the web. In addition, CONTENTdm hosts this content on their servers, so that the State Library does not have to maintain server space for this vast amount of content. All records added to the MMP also have a Worldcat record through CONTENTdm's Digital Collection Gateway, providing one more avenue for access to the content. Finally, CONTENTdm uses OAI harvesting for making records searchable in other repositories like the Mountain West Digital Library and the Digital Public Library of America. The requested amount of LSTA would allow the State Library to continue to provide this software and storage at no cost to Montana libraries. As a result, price does not constitute a barrier to sharing local history with the public worldwide.
- Digital Archive provides long-term preservation of master files. This includes checking the content regularly for bugs and creating fixes. It also creates updated files as hardware and software changes over time. Any institution contributing a collection to the MMP has the option of adding their content to the Digital Archive. As a result, digitized content resides in a secure digital repository, at no cost to the contributing institution. The requested amount of LSTA would allow the State Library to continue to provide this service at no cost to Montana libraries.
- EZproxy is an authentication method hosted by OCLC that provides users with remote access to Web-based licensed content offered by libraries. A statewide instance of EZproxy, maintained by the Montana State Library, is now available to Montana Shared Catalog libraries and to other libraries with SIP protocol capability. Patrons accessing Discover It! and the EBSCO databases remotely can be authenticated by entering their library card numbers once at the beginning of the search session. This one-time login via EZproxy eliminates the need for library staff and patrons to remember multiple passwords for the various EBSCO databases.

Montana Shared Catalog New Libraries:

- The Montana Shared Catalog (MSC) is a library consortium that shares knowledge, skills, and resources among its membership as well as an Integrated Library System (ILS). Created in 2002 with the participation and financial commitment from 17 initial, multi-type libraries, the MSC now includes 170 Montana libraries. MSC patrons have the use of a modern and robust integrated library system along with access to nearly 1 million bibliographic records and more than 4 million item records. Membership in the MSC also facilitates participation in and optimal use of other State Library programs, projects and pilots such as OCLC services, Montana Library 2 Go, EBSCO databases, and statewide courier services.

This funding request would be used to assist new libraries with vendor related costs to join the MSC, with funding amounts based on the number of bibliographic records, population served (for public and special libraries) and FTE students, staff, and faculty (for academic and school libraries).

Discover It! (EBSCO Discovery Service) Annual Renewal:

- EBSCO Discovery Service, known as "Discover It" in Montana, is a customizable centrally indexed search tool designed to perform a comprehensive search across multiple databases and other online resources. Online researchers using Discover It perform a single search to access search results from a wide array of resources, including the EBSCO suite of 24 databases, as well as unique content created in the state of Montana, such as the Natural Heritage Program Field Guide and digitized items from the Montana Memory Project. Libraries can also take advantage of EBSCO's store of centrally indexed metadata to link to their own individual subscriptions to online resources. In addition to performing a comprehensive search of quality content, Discover It also offers useful features that enhance the search experience, such as search alerts that will notify them when new results for certain topics are available; options to store, export, or email their search queries and selected results; and the ability to effortlessly generate citations in various formats, place interlibrary loans, and more. The Montana Shared Catalog membership covered half the annual cost of Discover It during the first two years of this contract. For FY16, the State Library requests additional funding to cover the full cost of renewal.

Montana Memory Project:

- MMP Digital Collection Development Funding would provide centralized digitization services to assist libraries, historical societies, museums, and archives throughout Montana in adding special collections to the MMP, either independently or through a partnership with a local institution. Projects must be

significant to the intended audience, but must also enhance the larger Montana Memory Project, per goals as outlined in the MMP Strategic Plan.

- Mountain West Digital Library Annual Membership Dues for Montana Memory Project: This is the first year that Mountain West Digital Library (MWDL) has required membership dues. These dues would add services to the Montana Memory Project by continuing to make MMP items available in the MWDL portal and the national Digital Public Library of America portal. The MMP currently partners with libraries, historical societies, museums, archives, schools, and cultural heritage organizations to share digital collections with the public. The proposed project funding would allow the collections contributed by these organizations to be harvested by the MWDL for inclusion on their web portal. The MWDL is a service hub to the Digital Public library of America and therefore MMP records will then be harvested by DPLA and included in their web portal as well. The total cost of the FY 2016 MWDL dues will be divided equally between the University of Montana Mansfield Library, Montana State University Library, the Montana Historical Society Research Center and the Montana State Library.

Literacy Projects:

- The 2015 Ready 2 Read Rendezvous would be the fourth Rendezvous. In surveys asking how the State Library can support public library efforts to promote early literacy and learning, training has been identified as the number one priority by responding librarians. They have identified that they do not feel that they have the skills or knowledge base to provide adequate services to Montana's youngest citizens (children from birth – five years old). Providing materials for outreach and for children to use (books, toys) in the library is a second priority. The Rendezvous addresses both of these needs. Additionally, the Institute of Museum and Library Services, which provides LSTA funding to the State Library, has identified early learning as one of its top priorities. Because the Rendezvous is designed in such a way that all attendees participate in all of the same trainings, breaks, and social events, attendees spend a lot of time connecting with and learning from one another. Attendees of previous Rendezvous events have cited the networking opportunities as another of the highlights of each Rendezvous. At this funding level, the Ready 2 Read Rendezvous would be a two day event, and limited to 35 participants.
- Early Literacy support position (5 hours per week), including travel: Since launching the Early Learning Statewide Initiative (Ready 2 Read) in 2009, there has been a 13.8% increase in attendance at children's programs and a 35.9% increase in number of programs. This popular program has provided training, outreach, programs, and Ready 2 Read trunks of early childhood materials to most public libraries in Montana. The proposed funding would support the Early

Literacy position (5 hours per week) and the continuation of these efforts. The Early Literacy position also coordinates the Ready 2 Read Rendezvous which is described on the previous page.

- Summer Reading Program (Manuals, PSAs, and Contract): The main event of the Children's Services calendar is the long established and popular Summer Reading Program, which provides programming materials to public libraries based on a central theme, for local programs targeted for patrons of all ages from early childhood through adult. Through this requested funding, the Early Literacy Coordinator would purchase a summer reading manual for each of Montana's public libraries and their branches. Additionally, this project would fund a contract for Cindy Christin, Head of Children's Services at Bozeman Public Library, to travel to the annual Collaborative Summer Reading Program conference and subsequently provide training to libraries on summer reading both in person at MLA and online in webinars.

Statewide Training:

- Trustee training provides the opportunity for public library trustees to learn how to maximize their roles as local library leaders. Focused workshop sessions on topics specifically targeted to trustee interests insure that these local library leaders are prepared to face the challenges associated with providing leadership and direction for a dynamic public library. Additionally, trustees are provided the opportunity to network with their colleagues across the state, to be informed about the trustee certification program, and to learn about additional resources available to them. These requested funds would provide training to trustees at opportune events, such as Federation meetings, and would also offer trustees travel opportunities to regional conferences.
- Fall Workshops focuses on the needs of public librarians and trustees who are not able to participate in other regional conferences due to financial or travel restrictions. State Library staff seeks to differentiate Fall Workshops from the professional development opportunities offered by other organizations in Montana to promote the greatest number of thriving professional development opportunities for all Montana librarians. With this requested funding, the 2015 Fall Workshops would once again provide needed hands-on training with an emphasis on State Library programs, critical timely content, and material that cannot be easily found elsewhere or taught online. At this funding level, Fall Workshops 2015 would be a two-day event hosted in Helena for up to 150 attendees. As always, registration would be at no cost to attendees. Lunch would not be catered this year in order to reduce costs.

MontanaLibrary2Go:

- OverDrive Annual Hosting Fee: MontanaLibrary2Go offers a collection of more than 23,000 downloadable audio and E-book titles to patrons of participating Montana public, tribal, and academic libraries. 89 public and academic libraries, representing 500,000 patrons, currently participate in this project, with new libraries added throughout the year. Over 1,000 patrons continue to sign up for the service each month; the total of MontanaLibrary2Go users statewide as of February 2015 is 66,800.

The consortium enjoyed a flat hosting fee of \$12,000 annually for the first seven years of its contract with OverDrive. Due to steep circulation increases and rapid growth of the consortium, the annual hosting fee increases in FY16, to \$36,000, and will ultimately increase to \$40,000 annually within this six year contract renewal period:

- FY16: \$36,000
- FY17: \$36,000
- FY18: \$40,000
- FY19: \$40,000
- FY20: \$40,000

Membership costs to libraries, which have covered the collection development budget, have increased by 5% annually, and yet demand for new and popular content has continued to rise each year, making it difficult to keep wait times for holds at a minimum. Circulation increased from 305,348 in state FY13 to 467,320 in state FY14, and is currently on track to surpass 550,000 checkouts in FY15. Helping to cover the hosting fee would allow the consortium to devote as much of their budget as possible toward meeting these demands for new content in the shared collection. The consortium is now being asked to contribute 50%, or \$18,000, toward the hosting fee, in this proposal.

- New Library Participation Fees (3 New Libraries @ \$1,500 each): The consortium remains open to new public and tribal libraries. The requested funding for new libraries would assist three new public or tribal libraries by covering the one-time OverDrive new library participation fee of \$1,500.

Courier Discount to Participating Libraries:

- Courier service reduces the cost of resource sharing between libraries. By sending materials in bulk via courier rather than individually packaging and sending via postal service, library budgets benefit from an average cost savings of \$7 per item (factoring in staff time, postage, and the cost of packaging

materials). High volume borrowers and lenders reap the greatest value from this service by shipping in bulk from one hub to the next.

The purpose of this funding request is: A. to reduce costs so that lower volume participants see a greater return on investment and B. to reduce costs to hub libraries which are bearing costs of staff time and courier services (including additional crate surcharges) for other regional participating libraries.

This requested funding would reduce costs to 17 drop site and hub libraries by \$2 per stop between October 2015 and September 30, 2016. An additional amount of \$400 is built in to this request to provide discounted service to potentially two new participating libraries at two stops per week. As a result, currently participating libraries would be able to sustain their participation in the courier service, and prospective members would be able to join the service at a reduced rate. Strong participation in a statewide courier network would allow greater opportunities for resource sharing, which would benefit the patrons of every participating library.

A note about LSTA funding for recurrent training events:

- The Summer Institute and Ready2Read Rendezvous are now offered on alternating years beginning in 2014. Requests for funding will always be included in the previous year's LSTA budget (ie, the 2015 Summer Institute funding request has been made in the FY14 LSTA budget).
- The annual Fall Workshop funding request will be included in the current year's LSTA budget (ie, the 2015 Fall Workshop funding request is made in the FY15 LSTA budget). Because the Fall Workshop is usually held in September, funding the Fall Workshop with the current year's LSTA award will prevent conflict with the September 30th spending deadline that applies to the previous year's LSTA award.

LSTA Deadlines

FY14 LSTA grant award period ends 9/30/2015

FY15 LSTA grant award period ends 9/30/2016

FY16 LSTA grant award period ends 9/30/2017

Calendar Year

2015

Summer Institute funded with FY14 LSTA

Fall Workshop funded with FY15 LSTA

2016

Spring Ready2Read Rendezvous funded with FY15 LSTA

Fall Workshop funded with FY16 LSTA