



Statewide Library Resources- Library Development Report April and May 2016

Prepared for the June 8, 2016 Commission meeting
by Sarah McHugh, Director of Statewide Library Resources

This report represents accomplishments of Statewide Library Resources Library Development staff: Jennifer Birnel, Jo Flick, Jessie Goodwin, Jemma Hazen, Pam Henley, Amy Marchwick, Lauren McMullen, Cara Orban, Mike Price, and Suzanne Reymer.

Goal One—Content

1. MSL acquires and manages relevant quality content that meets the needs of Montana library users.
 - 1.1. Enhance Montana State Library's statewide e-content subscription and purchase programs.
 - 1.2. Work collaboratively toward developing, managing, presenting, and preserving Montana-relevant digital content.

SLR Work Objectives:

- Working with the MontanaLibrary2Go Executive Committee, develop a request for information in FY16 to gather information about other consortium models available through different e-content vendors. This will provide the consortium with more information to help assess value of existing contract and make informed decision for contract renewals going forward. *(Orban)*
(Originally reported December 2015): With input from the MontanaLibrary2Go Executive Committee, Orban prepared a request for information, issued in October. The Executive Committee met November 13 to discuss the results of the request for information. Seven vendors responded. The Executive Committee will review the responses from Baker & Taylor and Recorded Books to compare their consortium models to the existing contract with OverDrive. Orban will review responses that were

submitted specifically for school and academic audiences and will share summary information through appropriate channels.

(Originally reported February 2016) Orban arranged trials for Baker & Taylor Axis 360 and for Recorded Books OneClickDigital for the MontanaLibrary2Go Executive Committee in January. The committee plans to meet in late January to discuss what they learned from these trials. Orban also organized a webinar for school libraries on January 28 to review vendor options for school consortia that were presented in the Fall, 2015 Request for Information responses. Currently our agreement with OverDrive (the vendor for MontanaLibrary2Go) does not allow for school library participation. However, there are several MSC school libraries that have individual contracts either with OverDrive or through Follet Bookshelf, etc. for downloadable e content, and their MSC bibliographic records, with connecting URL's, are maintained by MSC staff. Should an e content school consortia develop, workload to support a consortia would have to be considered.

(Originally reported April 2016) The Executive Committee met on February 26 and discussed the RFI responses and product trials. The consensus was that the competing services are similar to OverDrive, but do not offer some formats and device compatibility that the consortium currently enjoys with OverDrive. Lacking any perceived superior value in competing services, the committee agreed that the cost (in staff time and in content potentially lost through seeking publisher permissions) of moving to another service would not be justifiable at this time, and that the Executive Committee recommends continuing with the OverDrive renewal for FY17.

(Originally reported April 2016) Orban led a review of RFI materials specifically for schools on January 28, facilitated a follow-up discussion for interested k-12 librarians on February 18, and spoke in person with the Helena school district librarians group on March 2 in support of organizing a group to explore the possibility of forming an independently hosted e-content consortium (the State will not contribute funds or manage a contract). Working with teacher-librarians Joanne Didriksen from Helena and Kendra Hartman from Broadus, Orban collected school enrollment and annual circulation numbers from 53 school libraries that expressed interest in pursuing a group contract, and sent this information to three vendors who are amenable to k-12 consortia. The vendors have been asked to submit pricing estimates to Didriksen and Hartman before March 25. Orban will lead a discussion on consortium organization and responsibilities with this group on April 8 at the Montana Library Association conference in Missoula, with an online option for remote participants.

(Update: June 2016) Orban led a discussion on consortium organization and responsibilities with interested schools on April 8 at the Montana Library Association conference in Missoula. The group plans to meet during the MEA-MFT conference in October to develop policies and a fee structure for the consortium, to identify a fiscal

agent for the contract, and to determine how the contract will be awarded and negotiated in advance of a tentative January 2017 one-year renewable contract. Following MLA, Orban collected responses from interested libraries indicating available budgets for the potential contract and follow-up questions for vendors that will provide further details to help inform the group's fall discussion.

- Working with the MontanaLibrary2Go Executive Committee, review the current use of member library funds in the MontanaLibrary2Go annual budget and develop at least one different budget scenario that may address the need to cover both content and the annual hosting fee, where amount of available Library Services Technology Act (LSTA) or patron counts may be variable. The desired outcome is a sustainable and affordable budget model to implement in FY17. *(Orban)*
(Originally reported April 2016) Orban shared plans with the Executive Committee to form two or three different cost sharing scenarios to discuss at the membership meeting. All of these options will be goal-oriented, with a specific figure in mind in order to meet the coming fiscal year contract obligations as well as to plan for the future. These options are to be posted in meeting materials on the MontanaLibrary2Go governance web page by March 23.

(Update: June 2016) Orban and Executive Committee chair Susie McIntyre worked together to form three different cost sharing scenarios to discuss at the membership meeting. All of these options were goal-oriented, with a specific figure in mind in order to meet the coming fiscal year contract obligations as well as to plan for the future. The committee ultimately recommended the customary 5% increase to the membership for the OverDrive content budget, but advised the membership that changes to the cost formula would be forthcoming for FY18 in order to develop a more proactive plan for sustaining the content budget as well as exploring other possibilities for expanding shared access to e-content. Orban will work on this proposal over the summer with the new Lifelong Learning Librarian and the Executive Committee, along with a plan listing desired and this information will be shared with the membership in the fall.

- Run a test period with the live MontanaLibrary2Go Local pilot in which usage statistics and participant feedback is collected. Prepare a summary report detailing the pilot's objectives, work accomplished, how and why desired outcomes were or were not met, and recommendations for moving forward. Outputs and qualitative feedback from pilot participants will be collected and a report generated detailing knowledge and experience gained from the pilot which may be useful internally as well as to other libraries or library groups considering e-content management options. *(Orban)*
(Originally reported December 2015) The MontanaLibrary2Go Local pilot is live at <http://books.msl.mt.gov> and MSL staff has collected two months' worth of statistics to

date. Circulation numbers average to 40 per month. The pilot is open to any MontanaLibrary2Go libraries that have Session Initiation Protocol (SIP) authentication capability. This includes all Montana Shared Catalog libraries that subscribe to MontanaLibrary2Go. Staff feedback has indicated that the site functions well. Orban is collecting more information from participating libraries about their selection policies and priorities for local content so that we can create a more meaningful and efficient way of developing this collection.

(Originally reported April 2016) SLR-LD staff has initiated discussions with the New York Public Library regarding its IMLS-funded initiative, LEAP (Library E-Content Access Project). LEAP is a two-year IMLS funded federal grant project that advances work begun at the New York Public Library in conjunction with 19 partner libraries across the US and is coordinated through national strategic conversations led by DPLA. The outcomes expected through this project expand upon the desired outcomes that had been stated in the local e-content pilot:

- Expanded access to e-content that libraries want
- New avenues to distribute content of state and regional interest
- Affordable and manageable service that is advantageous for consortia
- Content ownership for libraries
- Mutually agreeable terms for publishers and libraries

The concept behind LEAP is to build the capacity to host and distribute ebooks on a national, library-driven platform and to launch a library-owned ebook marketplace through which libraries can purchase titles without vendor markup. The State Library may build upon its experience through the e-content pilot by making use of the Adobe Content Server to become a regional content hosting hub. State Library staff or consortium leaders in MontanaLibrary2Go may also have the opportunity to help shape policy and procedure as the LEAP marketplace develops; serve as a liaison to support publisher on-boarding to the LEAP Marketplace; serve as a liaison to support libraries as they wish to purchase from the Marketplace; and assist with metadata needs. In March, NYPL staff drafted a Memorandum of Understanding to codify MSL's interest in providing staff time and possibly infrastructure to this project. The MOU had not yet been delivered at the time of writing this report.

(Update: June 2016) NYPL delivered the draft MOU to MSL. At this time, MSL is considering whether it can contribute the staffing resources to meet the minimum match requirement expected of partners in the LEAP program, whether MSL could contribute match as part of a unified network of state library agencies, or whether NYPL should adjust these requirements, allowing for MSL's smaller scale while recognizing its unique perspective as a state library agency representing rural Western libraries.

- Develop and articulate a method and schedule for collecting and evaluating statistics on content and access provided through LSTA funded projects in order to better understand effectiveness and use of identified statewide projects, and to streamline reporting tasks throughout the year. SLR staff will receive training on how to evaluate statistics. The expected outcome is that SLR staff managing identified statewide projects have access to sets of statewide statistics that represent standard periods of time, and that can be divided into smaller groups (library type, size, geographic region) as necessary. SLR staff will gain knowledge about statistics evaluation that will make data collection a more useful tool for improving services and training and outreach strategies, and for communicating the value of SLR content and services to stakeholders. *(Lead: McHugh)*

(Originally reported February 2016) McHugh has led a working group comprised of SLR-LD staff Orban, Flick, Birnel, Henley, McMullen and Reymer in three initial brainstorming and planning sessions. The group has discussed the evaluation approach promoted at last year's Research Institute for Public Libraries conference using the concept of creating a data road map that incorporates the data trifecta of inputs, outputs and outcomes; identified inputs, outputs and outcomes that should be collected across all LSTA projects and services; talked about the data they currently collect; and suggested training gaps that need to be addressed to enable staff to more effectively understand and analyze their evaluation data. An initial list of possible sections for an eventual guide to LSTA funded project evaluation is being created as the next step.

(Originally reported April 2016) The evaluation guide has been drafted and during the drafting process the scope was expanded to address project evaluation standards for all Library Development projects and services regardless of funding source. The draft guide includes assistance with:

- Creating an initial data road map for a project or service
- Resources to utilize when creating the data road map that include the recent Library Development Study Task Force recommendations and the forthcoming individual project benchmarks anticipated from the Network Advisory Council
- Identifying potential audiences to anticipate reporting needs
- Questions to monitor successful ongoing evaluation throughout a project or service

The guide will be shared with the Network Advisory Council at their May meeting.

(Update: June 2016) The guide will be shared with the Network Advisory Council at their July retreat due to the cancellation of the May NAC meeting. The FY 17 Library Development project planning process now includes an evaluation component requiring staff to utilize the new guide to prepare evaluation benchmarks and techniques as part of the project they are managing.

- Following reorganization of SLR and Learning Portal websites, develop a plan with Learning Portal and SLR Portal groups to study Google Analytics reports and carry out usability testing to better understand areas that may continue to need improvement.
(Lead: McHugh)

(Originally reported April 2016) The SLR Portal session at the April MLA Conference will include an opportunity for initial feedback from our end users. Following that session, the first usability survey will be launched.

(Update: June 2016) The session at MLA was well attended. There were few questions about the new site. The work being done to rewrite the Montana Library Directory was mentioned during the session to make those attending aware of this additional, substantial change to come. A usability survey has not yet been launched, but there is agreement among the SLR Portal web leads that we should not delay a survey process due to the Directory rewrite work.
- Present community engagement training and support at Fall Workshops, MLA retreats, MLA conference session and other meetings as appropriate, in order to develop an inventory of strategic partnerships and practices that can be shared with libraries statewide. Partnership areas include digital collections, digital inclusion, health information/insurance literacy, agriculture, and support for education. (McMullen)

(Originally reported December 2015) McMullen coordinated a panel presentation at Fall Workshops on community partnerships and development programs from Montana Legal Services Association, One Montana, Harwood Institute, and Humanities Montana. These partners and programs offer Montana libraries the opportunity to host conversations on community enrichment, empowerment, problem solving, and progress. Many attendees expressed intent to offer the programs in their libraries in 2016.

(Originally reported April 2016) McMullen and Reymer presented training on community engagement to the board of trustees at Lewis & Clark Public Library so they can develop new community partnerships aligned with community aspirations and library goals.

(Update: June 2016) McMullen coordinated a panel presentation at the MLA conference on library – museum partnerships. Libraries and museums are trusted community anchors with common missions. Librarian attendees learned how to initiate and build relationships with local museums through collaborative programming, shared community space, and digital collections.

- Identify 8-10 communities on the Hi-line in Montana that have rich collections of unique materials related to Montana’s economic, social, cultural or political history or materials that document a more current transition, such as the Bakken project. Encourage these communities, in partnership with their local library, to add these collections to the Montana Memory Project. *(Birnel)*

(Originally reported December 2015) Birnel met with several library directors, museum directors, and historical societies on the northeastern Hi-line, demonstrating how to use the site and discussing possible collections the institution may consider adding. Some of the visits were brief and introductory in nature, others included a presentation of the MMP for larger audiences.

(Originally reported February 2016) Havre-Hill Library has submitted a collection application for an oral history collection. This collection has been approved by MSL and the Montana Historical Society and has also been selected to receive LSTA Project funding to assist with digitization. Additionally, the Valley County Museum has been in touch and is seeking funding for a project through the Montana History Foundation Grant to digitize ledgers from a local general store.

(Update: June 2016) The audio tapes from Havre-Hill Library have been digitized by the vendor and will be shipped back later this month. These will then be uploaded to the MMP. The Valley County Museum was awarded funding from the Montana History Foundation and they are currently digitizing the historic general store ledgers. The public libraries in Cut Bank, Chinook, Malta, and Plentywood are sending their yearbooks to the digitization vendor to be digitized. Birnel will make outreach visits to the Northwest this June, visiting libraries and museums in Kalispell, Whitefish, and Libby.

- Collaborate with staff of the Montana Historical Society and the Montana Office of Public Instruction to create classroom lesson plans for the Montana Memory Project so that teachers can easily incorporate this resource into their yearly teaching activities. *(Birnel)*

(Originally reported December 2015) As new social media themes are developed the contact for these theme posts are being added to the Educational Resources section of the MMP as PowerPoints that can be downloaded and used by classroom teachers. Some examples are included here:

[World War II](#)

[Transportation](#)

[Firefighters](#)

[Horses and Horse Power](#)

[Logging Mills and Camps](#)

[Miners, mines, and mining camps](#)

Boom and Bust: The Industries that Settled Montana

(Originally reported April 2016) The Content Priority working group felt that focusing on oral histories for a year would be nice way for the Montana History Foundation, the Montana Historical Society, The Montana Digital Academy and Montana PBS to work together to encourage new contributions to the MMP and to encourage use of the existing materials. The Montana Historical Society has offered some consultation time to help a history teacher from the Montana Digital Academy create a lesson plan prototype for other teachers to use. PBS has produced video oral histories and can see a role in this process. The Montana History Foundation provides funding for oral history projects and will continue to ask grant applicants to contribute their projects to the MMP.

(Update: June 2016) The Content Priority working group has made the further decision that resource materials for creating oral histories should be gathered and published. These materials will include recommendations for recording devices, best practices for video and audio recordings, best practices for asking questions and follow-up questions. Birnel is reaching out to particular partners to develop these materials.

- Explore in collaboration with UM, MSU, and The Montana Historical Society Research Center the possibility of becoming a direct service hub to the Digital Public Library of America. As a service hub we would send Montana Memory Project items to the Digital Public Library of America (DPLA) and aggregate and harvest other Montana digital repositories to share with the DPLA. *(Birnel)*

(Originally reported December 2015) Birnel and McHugh met with the other partners to discuss the options available and what needed to be explored. UM, MSU and the Historical Society Research Center have offered staff expertise and time to assist MSL in this investigation. A committee was developed to further explore options.

(Originally reported February 2016) The committee met in December and reviewed the application materials. Birnel demonstrated how the open source program, REPOX, can be used to harvest the metadata to make it available to DPLA. A centrally hosted version of this software is currently being configured to be made available through MSL. The group will meet again in February to discuss next steps.

(Originally reported April 2016) The committee met in February and reviewed the use of a centrally hosted instance of REPOX. Birnel has written a draft Memorandum of Agreement for the partner institutions, which is currently being reviewed. DPLA Content Manager, Emily Gore, has been invited to Montana to speak to the partner about the application process. A save the date has been sent for May 2, 2016.

(Update: June 2016) The Montana Memory Project, the Montana Historical Society, University of Montana, and the Montana State University have formed a partnership

called the Big Sky Country Digital Network. This group is working together to apply to be a DPLA Service Hub. On May 2, 2016 Emily Gore, DPLA's Director for Content, came to Helena to meet with the partners and discuss in more detail what being a hub entails. She made great recommendations on how to manage the partnership and on how to proceed. The group is now working on the application and on forming a Memorandum of Understanding to outline the details of the partnership.

The Montana Memory Project plans to discontinue their partnership with the Mountain West Digital Library, which is the current on-ramp for MMP content to the DPLA. As a direct DPLA service hub the Big Sky Country Digital Network will aggregate metadata from the partners and share it with the DPLA to be part of their discovery portal. The partners will also work with other digital repositories in the state to aggregate their content and share it with DPLA. Montana partners currently include:

MMP	MHS	UM	MSU
Jennifer Birnel	Molly Kruckenberg	Shali Zhang	Kenning Arlitsch
	Tammy Troup	Wendy Walker	Jim Espeland
		Teressa Keenan	Susan Borda
			Michelle Gollehon

- Continue to seek a solution for individuals to share Montana related content through the Montana Memory Project, acting as a portal of discovery. *(Birnel)*

(Originally reported April 2016) The MMP Advisory Council Content Priorities group will collaborate on creating a possible work flow for accepting and uploading content within CONTENTdm that is provided by individuals. An application for a new collection of materials held by an individual has been submitted to the MSC Director. This application will give the MMP Advisory Council a starting point to explore more seriously the option of enabling individuals to share Montana related content in the MMP.

(Update: June 2016) The recent individual application was not approved, due to the fact that the applicant did not own the content. Options for individual contributions of content are still being explored.

- Continue working on launch of new EBSCOhost e-book collection. The outdated MSC “NetLibrary” collection was inherited by EBSCOhost when it was purchased from OCLC. The collection is out of date and needs to be refreshed with updated content and returned to the MSC database for discovery. *(Adams, Price)*

(Update: June 2016) This work was not completed this fiscal year, due to staff turnover and lack of time.

- Collaborate with vendors and the MSC Content Management Committee to bring the MSC catalog into full compliance with Resource Description and Access (RDA) metadata standards. The RDA standards are the new, unified, international cataloging standards. Cataloging best practices need to include RDA standards not only to bring the catalog in compliance but also to take advantage of enhanced displays in discovery platforms. *(Adams, Hazen)*

(Originally reported December 2015) Received cost quotes from several vendors for the cost of updating our bibliographic records for full RDA (Resource Description and Access) compliance. All were very high. We can use our SirsiDynix Premier Platinum Services consulting hours to pay for the cost of them performing the service. The update has been scheduled to take place Dec 3, 2015.

(Originally reported December 2015) The Content Management Committee had a special meeting in September and came to agreement on most of the standard cataloging practice changes needed for RDA. An updated Standard Cataloging Procedures document was finalized and posted to the membership shortly after the meeting.

(Originally reported February 2016) SirsiDynix performed the RDA update process in the Shared Catalog, January 15-18, to add RDA fields to all Shared Catalog bibliographic records. and this update brings the Shared Catalog bibliographic structure into compliance. Hazen supervised the process, working closely with SirsiDynix to ensure a successful completion over the holiday weekend. Marchwick and Price performed internal system tasks to manage cataloging processes and copy overs.

Goal Two—Access

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

2.1. Improve the user interface of MSL’s Web sites and improve and expand online service to meet changing user needs.

2.3. Improve Montanans’ access to library materials (including discovery, request, and

delivery), providing more materials to choose from, and making access increasingly efficient.

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

2.6. Publicize Montana State Library's services and resources.

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

2.8. Actively investigate and implement, as appropriate, web-scale solutions including web-scale integrated discovery systems, cloud computing, centralized indexing and harvesting of content, to make the resources of Montana libraries discoverable in a single search.

SLR Work Objectives:

- Work with the Courier Advisory Board to review the current cost sharing structure, with the desired outcome of making the courier an affordable option for lower volume libraries. (*Orban*)

(Update: June 2016) This work has resulted in a proposal to the Montana Shared Catalog libraries which was presented to the consortium at their May meeting and is further described below.

- Look for opportunities to extend courier service between Havre and Browning and develop a plan for sustaining service beyond this contract period which runs through December 2016. (*Orban*)

(Originally reported December 2015) Orban met with the Courier Advisory Board on October 22 to develop a strategy for planning for affordable and inclusive service in the second year of the contract and beyond. Currently, the group has \$5,428 in FY15 LSTA to sustain the \$2 per stop discount for current participating libraries. To complement the findings of the MSC Executive Board survey, Orban has distributed via listserv questions pertaining to physical delivery and courier service addressed to both potential and current participating libraries in order to learn more about partnerships, affordability, and other service issues in advance of planning for 2016-17. Responses will be reviewed in December, and in January the Board will study different fee structure options that emerge as a result of those responses.

(Originally reported February 2016) This project was delayed as Orban spent most of December working on the annual LSTA report. Orban resumed work on this project

in January, with the objective of producing two cost formula scenarios for the courier advisory board to consider by early February.

(Originally reported April 2016) Orban created a cost sharing formula for the courier after evaluating responses from the courier user and potential user surveys distributed in December and studying annual statistics from the courier contract, OCLC interlibrary loan, and Montana Shared Catalog holds reports. The purpose of this proposal is:

- To help fulfill the MSC's mission of encouraging resource sharing and collaboration
- To help libraries that are currently struggling or unable to participate see a benefit to taking part in the courier
- To help remote MSC libraries who do not have access to the courier network to take part in resource sharing by providing a shipping discount

MSC libraries are responsible for 91% of courier activity. This is an essential service to support resource sharing groups. Sharing group libraries could not support resource sharing at their current volume without a reliable courier. The formula also sustains the existing network by benefitting academic courier partners and public courier partners who are not yet part of the MSC. This proposal was shared with the MSC Executive Board at their March 2 meeting, with the Courier Advisory Board at their March 4 meeting, with the Network Advisory Council at their March 8 meeting, and with the MSC Partners resource sharing group at their March 15 meeting. Orban will collaborate with MSC Director Goodwin to incorporate the courier budget request into the MSC annual budget proposal in advance of the April deadline for MSC Spring meeting materials.

(Update: June 2016) Orban explained the purpose of the courier shipping proposal at the MSC spring members meeting. The majority of the membership in attendance voted to accept the proposal to contribute \$25 annually toward a shipping discount for sharing group libraries that are not eligible for courier service. Hub libraries that already receive a subsidy for courier service also contribute a separate amount that is calculated according to their courier discount, which is paid through LSTA funds. Next steps are to follow up with eligible MSC libraries and provide guidance on how they can take advantage of this opportunity, and to communicate changes in billing to Critelli for courier hub libraries. Orban expects further courier development to be part of her FY17 work plan. (An overview of the proposal will occur during the June Commission meeting).

- Review authentication processes and authentication testing for statewide projects. Using authentication statistics and gathering feedback from library staff, determine which methods are working for libraries actively using statewide services. An expected outcome is that MSL staff gain a better understanding of how authentication is enabling

or deterring library staff and patrons from using services, how any problems could be resolved and gains an understanding of current authentication options. *(Orban and Price)*

(Originally reported December 2015) Orban and Price worked together to create statistical reports from EZproxy logs sent monthly from OCLC. The reports cover authentication success rates and resources accessed, as well as indicate why users may not be successful in logging in. For 2015, as of October, EZproxy had been accessed 2,282 times. Missoula represents approximately half of this usage, at 1,131 logins, followed by Helena at 265 and Butte at 121. The failure rate averages to 23% and can mainly be attributed to incorrect entry of library card numbers. EBSCOhost, Taylor & Francis, and Reference USA are the most frequently accessed resources.

(Originally reported December 2015) Orban requested input from other state library agencies to learn more about their preferred authentication methods and their experiences working with vendors for statewide implementation. The four states that have responded (South Carolina, Massachusetts, Michigan, and Wisconsin) use geolocation and work with vendors on an individual basis to distinguish usage statistics by location. Based on these responses, geolocation is a top priority for further study and trial, if possible, in early 2016.

(Update: June 2016) The authentication study, which has the potential to primarily affect the statewide databases contract, has been suspended until a decision is made about use of funding for that contract for FY17.

- Contribute to the redesign of the My Montana Library website, with a focus on three major areas: Statewide Projects and Services, Community Partnerships, Montana Culture. This project is undertaken in order to improve the existing site by making it more responsive to direct library end user expectations. *(McHugh, Orban, McMullen, Groves)*

(Originally reported April 2016) An MSL Project Proposal Form detailing the outcomes, implementation, maintenance, evaluation and funding needs for this project was submitted to the MSL management team in March. An anticipated timeline includes identifying FY 17 funding for the anticipated cost of navigational templates for the redesigned site in July, implementation of the new site in July-August and promotion of the resource through the Fall.

(Update: June 2016) Next steps as described in the April update will be led by the new Lifelong Learning Librarian position.

- Create a “Montana Public Library Websites” cohesive effort so that all public libraries will have vibrant websites that provide excellent virtual services to their communities, including local access to statewide resources. *(McMullen, Henley, Reymer)*
(Originally reported April 2016) McMullen is conducting an inventory of existing websites.
(Originally reported April 2016) McMullen, Henley and Reymer are planning to meet with MSC staff to learn more about the website creation opportunities for MSC libraries within the MSC Enterprise tools used to create and customize the MSC catalog’s user front end interface, in order to expand MSL support for this website creation option.

(Update: June 2016) An inventory of Montana public library websites is completed, and problem areas have been identified, mostly involving outdated software, lack of maintenance, and missed opportunities. As an immediate step toward improvement, Montana public libraries wishing to update or improve websites will be invited to meet online for networking and discussion on how to create and maintain an effective web presence. The meeting will be scheduled in August, after the summer reading program season.
- Create a promotional campaign about the MSL consulting program, which may include an improved web presence, brochures and/or newsletters. Library directors and trustees will become better informed about consulting services available to them because of this campaign. *(McMullen, Henley, Reymer, Groves)*
(Originally reported December 2015) A promotional brochure highlighting the consulting program was created and distributed at the Montana Association of Counties Conference in September. The brochure focuses on the areas of consulting services MSL makes available to public libraries and introduces the three Statewide Consulting Librarians and their consulting territories. Additional work on this initial brochure is expected this winter.

(Update: June 2016) No further work has been accomplished on this objective, however, the consulting pages within the SLR portal continue to be re-organized for improved communication to users.
- Launch an RFP process to seek options for new MMP software. The RFI done in FY 2015 revealed there are several new vendors offering services that compete with our current solution, CONTENTdm. This RFP will determine if there is a better alternative for usability and costs. *(Birnel)*

(Originally reported December 2015) The RFP has been put on hold until the recommendations from the Library Development Study Task Force have been made to the Commission and action taken.

(Originally reported April 2016) This item is not being pursued at this time, due to funding considerations. The MMP Advisory Council has created a working group to study the current MMP budget and to suggest long term options for the MMP software platform.

- Work to improve Search Engine Optimization (SEO) of the Montana Memory Project. Create a Wikipedia entry for the MMP, so that it is recognized as a trusted source. Measure success through the use of Google Analytics. *(Birnel)*

(Originally reported December 2015) Birnel has consulted with colleagues at MSU and has learned more about improving search engine results. Several searching issues have been resolved and now mtmemory.org and montanamemory.org are consistently showing as the top two search results in Google and Yahoo. The work to improve the results list in various search engines will continue.

(Originally reported February 2016) Birnel has discovered through additional consultations that a further step can be taken to improve search results by creating a Wikipedia entry for the State Library and the Montana Memory Project. Additionally, a Google for Business entry can be created to bring the MMP to the top of the search results. Birnel and Sara Groves, the Communications and Marketing Coordinator, will work together to develop Wikipedia pages for MSL.

(Update: June 2016) This work has not been accomplished this fiscal year. It remains a valuable effort to be continued next fiscal year.

- Continue to coordinate development of both DiscoverIt and the new Enterprise end user front end to the MSC catalog in an effort to reach library users in either environment, meeting the user wherever they may be searching *(Orban, Adams)*

(Originally reported December 2015) The direct link between Enterprise and the statewide Ebsco Discovery System (EDS) has been established and is being added to the individual Enterprise library profiles. The link provides seamless searching between the two interfaces.

(Originally reported December 2015) With the upgrade to Enterprise version 4.5, Enterprise and DiscoverIt search results can now be interfiled on the same search results screen. The results include the "Research Starter" from EBSO Enterprise Discovery Services as the first section of the display along with separate facet columns for both services.

(Originally reported April 2016) Activity on developing Discover It has been suspended, pending Commission action on the recommendation of the Network

Advisory Council to cancel the EBSCO Discovery Service contract as part of the proposed FY 17 Statewide Library Resources Library Development budget.

(Update: June 2016) The EDS subscription will not be renewed following Commission action in April on the FY 17 Library Development budget.

- Participate in evaluation and testing of the MSC's cloud-based library management system as it is rolled out by the vendor. Along with providing support to members as they learn about the new products, our participation will help ensure vendor development of cloud based cataloging, circulation and acquisition interfaces includes functionality required for consortia. *(Adams, Marchwick, Hazen, Goodwin, Price)*
(Originally reported December 2015) "BLUEcloud" web services were installed on the MSC production server, which enables MSC staff to begin testing, evaluating and using the cloud based products now being developed by SirsiDynix.

BLUEcloud Analytics is now 90% functional with catalog, item, user, and historical usage statistics. Special accounts have been created for selected MSC member libraries so that they can begin becoming familiar with the product and assist the MSC staff with training which will begin in spring 2016.

BLUEcloud Cataloging has been implemented for testing on the MSC test server. It is not ready for consortial use yet but new functionality is added with each web services upgrade from SirsiDynix.

MSC staff has signed up to participate in the pilot evaluation of the Circulation and Visibility (linked data) products currently in development. "Visibility (linked data)" broadens the results of Shared Catalog searches so that they are included in major search engines.

(Originally reported April 2016) MSC Library staff and member libraries continue to test and evaluate BLUECloud Analytics functionality. McHugh and Goodwin will meet with a SirsiDynix representative on March 21 to negotiate FY 17 pricing to continue utilizing a hosted instance of Director's Station, given the difficulties in the current BLUECloud Analytics functionality for large consortia such as the MSC.

(Update: June 2016) BLUECloud Analytics continues to be tested and evaluated, with 6 MSC libraries testing logins and more expected to begin in FY17. Demonstrations of BLUECloud Analytics were presented at the MLA Conference and the MSC Spring Members Meeting. After McHugh and Goodwin's meeting with the SirsiDynix sales representative it was noted that MSC will not be charged for hosting of Director's Station. Concerns regarding the need for a larger number of BLUECloud Analytics users

in a large consortium such as the MSC were shared with the sales representative. SirsiDynix has offered additional instructor led training on the product, which is expected to be scheduled during the 2016 calendar year.

- Complete MSC Enterprise online catalog implementation for all MSC libraries and discontinue use of the older iBistro/eLibrary interface. Ending local support for eLibrary will reduce staff workload. *(Adams, Price)*
(Originally reported December 2015) Enterprise profiles have been completed for all MSC member libraries and are in use, live, by 75% of the members. All member libraries' profiles will be in production by Dec 31st, after which, access to eLibrary will be discontinued.
(Originally reported April 2016) Discontinuation of eLibrary has been temporarily postponed pending resolution of the length of time Enterprise takes to load the "Place Hold" button for member libraries as well as the On Order item display for libraries using the Acquisitions module.

(Update: June 2016) MSC staff continues to work with SirsiDynix support to solve the issues regarding the length of time for the "Place Hold" button to appear as well as the Acquisitions module display problems. Because of these issues, the discontinuation of eLibrary has not been scheduled. This is a high priority item to resolve. It is possible that the removal of large numbers of circulation map lines and other system policies that will occur this summer as part of the final stages of the reorganization effort may reduce the hold button issues. MSC libraries will be required to standardize their use of the Acquisitions module in the future, which may resolve the display issues.
- Increase use by MSC member library staff of mobile devices and services available for interface with the MSC library management system enabling them to keep current with technology as it trends toward a more mobile user environment *(Adams, Marchwick, Hazen, Goodwin, Price)*
(Originally reported December 2015) Increased training opportunities along with improved functionality has led to much wider acceptance and interest in MobileCirc with many libraries now using it as their primary tool for completing inventory.
(Originally reported December 2015) A major marketing push for the Shoutbomb SMS texting service took place in May and June and has more than doubled the number of libraries and patrons using the service. Nearly 10,000 text messages for are now being sent monthly.
(Originally reported April 2016) Following a training in February, a variety of additional MSC libraries activated MobileCirc and learned to assist patrons in the use of BookMyne, the SirsiDynix patron discovery app.

(Update: June 2016) Plans for summer 2016 regional trainings include additional information and guidance on MobileCirc usage. A major update to the app is expected this summer which will allow for additional functionality.

- Investigate the potential of a centralized RFI process for at least some pieces of the E-rate program in order to better support those libraries wishing to take advantage of new discount opportunities in the program. *(Reymer)*
(Originally reported December 2015) Reymer has collected sample RFIs and RFPs from colleagues in other states which provide examples of the ways in which other state libraries are providing a more centralized approach to certain pieces of the E-rate process. This will assist us in considering this option for Montana libraries and how this approach might be developed within the Montana E-rate scene.
- Investigate the possibility of regional, consortial contracts for more uniform broadband services and pricing within E-rate program and without, in order to determine if an effort like this is feasible and would produce benefits to participating libraries. *(Reymer)*
(Originally reported December 2015) Reymer learned about the Georgia Public Library Systems regional, consortial approach to contracts and received helpful advice on negotiating with vendors.
(Originally reported February 2016) Reymer is reviewing the data gathered during the MSL's Broadband Technology Opportunity Grant program (BTOP) (2009-2012) pertaining to bandwidth upgrade purchases and hardware refreshment for BTOP libraries during the course of that program as part of an investigation into the possibility of purchasing a minimum, agreed upon level of bandwidth for public libraries.
(Update: June 2016) Making significant impact in improving broadband access to Montana's public libraries is dependent on having a statewide plan and additional funding to help with the portion of broadband costs that isn't covered by E-rate. Reymer has worked with Stapp and McHugh on options that could be part of an EPP request in the next legislative session.
- Stay involved with and attuned to national and state initiatives related to broadband development during this time of significant national and state discussions related to broadband needs, in order to ensure that Montana libraries stay informed and have a voice. *(Reymer)*
(Originally reported December 2015) Reymer attended meetings of the Internet 2 group and the Montana Telecommunications Association conference to learn more about alternatives and opportunities available within the state. Reymer also participated in the Silicon Flatirons meeting with the Federal Communications Commission to represent libraries' concerns about fiber build outs and E-rate modernization. Reymer

also attended American Library Association's (ALA) E-rate Task Force meetings at the 2015 ALA Annual Conference and Universal Service Administrative Company E-rate Training in Portland. Changes in the program were a focal point.

- Contribute to the planning for and implementation of the rewrite of the Montana Library Directory with a focus on current and future uses of this statewide library tool. (*Leads: McHugh, Price*)

(Originally reported December 2015) An initial informational meeting was held in November during which the rewrite team comprised of McHugh, Price, Orban, McMullen, Flick and Colleen Hamer learned about the overall process. This team is now compiling a master spreadsheet of "user stories", based on the Agile project planning process, to share with the MSL IT staff that will be involved in the Directory rewrite. These user stories communicate what functions SLR-LD staff, Montana librarians and trustees and the general public would like to see in a new Directory. The list is due to the IT staff in December, with the technical work scheduled to begin in January.

(Originally reported February 2016) The master spreadsheet of user stories was submitted to MSL IT staff December 15. A meeting to launch the technical work will take place January 25.

(Originally reported April 2016) Following the January meeting, the Agile process of work "sprints" organized by task commenced. The initial sprint has included McHugh and Price who receive daily progress updates on the creation of the underlying access structure for the new Directory. The next sprint will focus on the process of creating library records in the new Directory.

(Update: June 2016) Sprints have been completed that focused on the creation of library records in the Directory and the creation of position records. The next sprint will focus on Directory processes as they relate to the initial creation of a library, a new user, a position and the editing process for each.

Goal Three – Training

3. MSL provides appropriate trainings and training resources so that the best use can be made of the resources offered.

3.1. Enhance Montana State Library's statewide training opportunities including all formats with client-learning as the Library's goal.

3.2. Provide users with trainings and assistance related to statewide offerings and resources.

3.3. Develop and present appropriate library leadership training for Library Directors and Trustees.

3.4. Provide regular training opportunities for MSL programs and services.

3.5. Train and assist users to contribute content to MSL's collections.

3.6. Provide a central repository of training materials in various formats that support and make successful ongoing statewide projects and MSL resources and services.

SLR Work Objectives:

- In response to the increasing turnover in public libraries as directors enter retirement, focus on training needs of new public library directors to provide essential information and skills. Develop a comprehensive training curriculum for new public library directors that utilizes the Chief Officers of State Library Agencies (COSLA) New Directors 101 series and supplements that with Montana-specific self-paced online tutorials. (*Lead: Flick*)

(Originally reported December 2015) MSL contracted with Sage Solutions, Non-profit Consulting to conduct three onsite 3-hour trainings on preparing for succession. Sage trainers, Terry Profota and Teresa Geremia-Chart conducted trainings at the following federation meetings: Broad Valleys, South Central, and Golden Plains. A session at Tamarack was later added to the contract and costs for that training were shared with the Tamarack Federation. Sage provided a *Succession Toolkit*, which was published in a spiral bound book and provided as a handout and workbook for the first three sessions. Attendance was nearly double in total to similar sessions that MSL has offered in the past, owing at least in part to the coupling of the training to the federation meeting. Feedback has been very positive; leading the LD staff to request a proposal for another round of trainings and a webinar series for Winter-Spring 2016.

(Originally reported December 2015) The COSLA New Directors 101 series is being published on WebJunction. MSL's CE Coordinator served on the committee that created the 4-part video series and accompanying learner's guide/workbook.

(Originally reported December 2015) An outline for essential training and information for new public library directors has been drafted by the CE Coordinator and a series of self-paced tutorials will be developed using Adobe Articulate Storyline over the winter. These tutorials will focus on essential, Montana-specific information that every new public library director needs to know. A page on the Learning Portal will be devoted to New Directors with the "essential" curriculum to include links to the COSLA series, the self-paced tutorials, and "suggested" curriculum to explore related training.

(Originally reported February 2016) Sage Solutions Non-Profit Consulting has presented a contract to MSL for succession trainings at the Pathfinder and Sagebrush Federation Spring meetings in 2016, as well as a webinar series scheduled for April 2016. The *Succession Toolkit* will be reprinted for distribution at these two Federation meetings as well.

(Originally reported February 2016) Flick has scripted three of the 12-13 lessons planned for the New Library Director Administration series. Each lesson will be 10-20 minutes long with built-in assessments. A prototype lesson has been created in Adobe Articulate Storyline and a location on the MSL webserver is being sought to host these html files which will be linked to the Learning Portal.

(Originally reported April 2016) Terry Profota of Sage Solutions presented her Succession Planning to 20 attendees at the Sagebrush Federation meeting at Miles City Public City on March 5, 2016. Terry will also present at the Pathfinders Federation on May 19 and will host a noontime webinar series on March 23, 30 and April 13. Online self-paced tutorials are under production to provide new library directors with Montana-specific essential, need-to-know information. An additional training has been added for May 14 in at the Best Western GranTree in Bozeman focused on performance evaluation with Pat Wagner of Siera Consulting.

(Update: June 2016) Terry Profata of Sage Solutions presented Succession Planning training to trustees at the Pathfinder Federation meeting on May 19, 2016 This concludes a highly popular series of online and in person trainings geared toward trustees during this fiscal year.

(Update: June 2016) The online tutorial series for New Directors to supplement the New Directors 101 series created by the Chief Officers of State Library Agencies, with Montana-specific information is still in the process of completion. This project will continue next fiscal year.

- Using Camtasia, develop one tutorial each month for Statewide Projects to meet needs unique to Montana libraries and not available through vendors. This would result in higher statistical use and higher level of interest in statewide projects, as indicated by statistical reports and by number of monthly inquiries. Less time spent answering repetitive questions about a process that could be demonstrated through a recorded tutorial, indicated by online visits to tutorial. *(Leads: Orban, Flick, Goodwin)*

(Originally reported December 2015) The CE Coordinator created an online [tutorial](#) on the Hunter-Planner Map in collaboration with the GIS manager for FWP.

(Originally reported December 2015) Orban has created two short tutorials for MontanaLibrary2Go using Camtasia and posted them to the MontanaLibrary2Go Learning Portal page.

(Originally reported December 2015) MSL holds five Camtassia licenses and one Adobe Articulate Storyline license, but it takes time to learn to use the software and the staff has been struggling to find the time. The MSC trainer has been the most productive on this effort. Going forward, training staff plan to meet online in December to focus on Camtassia collaborative training with all staff committed to making an attempt before the meeting, so they can identify their hurdles and use peer support to overcome them.

(Originally reported February 2016) Goodwin continues to use the Camtassia software to create tutorials of interest to MSC members.

(Originally reported April 2016) Flick has created a brief tutorial on how to apply for certification online using Camtassia.

(Originally reported April 2016) Goodwin and Hazen created cataloging tutorial on adding RDA fields in WorkFlows. Goodwin created a short tutorial explaining a change to WorkFlows display columns to assist in searches with new RDA cataloging fields.

(Update: June 2016) Flick used Camtassia to augment the *Succession Planning for Library Trustees* recorded webinars so that viewers would receive instructions on when to pause during the videos for discussion or reflection. Camtassia is proving to be an excellent tool for enhancing the interactivity of recorded webinars. The new MSC Trainer will be utilizing one of MSL's five licenses to create and deliver short trainings in a variety of topics to MSC members.

- Establish a school library liaison for coordinating efforts in training and outreach on EBSCO content and services. This will provide more meaningful information sharing between school libraries and MSL results in higher use of existing services and/or better understanding of how services could be improved to meet student needs. *(Orban)*
(Originally reported December 2015) In September, Orban contacted NAC representatives Dana Carmichael and Joanne Didriksen to discuss the use of statewide databases and to learn more about developing outreach and training specific to the needs of school libraries, considering their primary means of communication, curriculum standards that must be addressed, and any barriers to use of statewide resources that we may not have considered. Both responded that in-person networking and conference opportunities were important and more effective than mass distribution avenues; that school librarians are looking for content that directly supports Common Core standards and cannot spend a lot of time sifting through other materials; and that librarians need a higher level of support in customizing EBSCO interfaces to create a relevant, age-appropriate set of results. As a result of this initial outreach, Joanne Didriksen invited Orban to attend the Helena School District Librarians monthly meeting in October, where she shared an introduction to statewide library resources available to

school libraries and invited school library staff to contact MSL for assistance with any of these resources.

Goals for this year related to increasing use and understanding of the databases by schools include understanding more about schools' and school libraries' needs and what kind of content they need from us in order to develop meaningful services and outreach; removing barriers to easy authentication and access; and building up a centralized web presence for database information, intended for library staff, on the MSL Learning Portal. Resources will include tutorials and training resources and downloadable promotional materials for the databases most used by or most useful to school libraries. Highlighting resources especially for teachers and teacher librarians; and promoting knowledge sharing by collecting materials from school libraries that demonstrate the use of EBSCO databases to share with other libraries are also in the planning stages.

(Update: June 2016) Outreach and needs assessment for schools has been suspended until MSL funding for a statewide databases contract next fiscal year has been determined.

- Transition responsibility of makerspace pilot trunks to federations. Federations' responsibilities will be to facilitate movement of the trunk within the federations. The Statewide Projects Librarian will continue to provide a basic orientation to new hosting libraries and to collect signed paperwork and statistics from hosting libraries. Keeping the makerspace kit within the federations allows MSL staff to focus less on the time-consuming matter of statewide logistics for six trunks and more on targeted training that will benefit libraries hosting the trunks. *(Orban)*

(Originally reported December 2015) Beginning in October, the six makerspace trunks have been assigned to federations in order to reduce time spent planning around logistical challenges, while Orban will continue to provide online training and orientation for makerspace hosting sites and collect statistics and evaluations for the project. Online orientation was provided for Boulder Community Library and St. Matthews School Library in October.

(Originally reported December 2015) Orban worked with library consultant Sue Walker at the Idaho Commission for Libraries to gather and organize survey information from small and rural libraries in both states in order to create a best practices guide for smaller libraries that are interested in starting a makerspace. This work culminated in a presentation at the Association for Rural and Small Libraries conference in Little Rock, Arkansas, in October.

(Originally reported April 2016) Henley delivered the final makerspace trunk to a library in the South Central federation in March, and all makerspace trunks are now circulating in their respective federations.

- Present at least 3 strategic planning trainings to public library directors and boards, to include succession planning where needed. This is in response to the continuing training requests for strategic and succession planning, as directors and boards change. Make better use of resources created by COSLA and other regional and national organizations by organizing links in the learning portal and developing a flyer to inform library boards of material and training available. *(McMullen, Henley, Reymer, Flick)*

(Originally reported December 2015) Four Succession Planning trainings were presented at the Spring 2015 Federation meetings.

(Originally reported December 2015) COSLA trustee training materials developed this year include a checklist for hiring a new director with links to resources and the development of templates for hiring: outlining goals for the hiring process, sample job descriptions, sample job ads, interview questions, tips on checking references, how to introduce the new director to the community. Flick served as the COSLA working group leader for this project.

(Originally reported February 2016) Strategic planning has been included on the list of available and recommended trainings which the MSL will provide to Federations at their Spring meetings.

(Originally reported April 2016) McMullen provided board basics and strategic planning assistance at Valier Public Library and Harlem Public Library, so new board members can participate in an informed way, in continued strategic planning at these libraries.

(Update: June 2016) Reymer met with Manhattan Community Library Board to discuss community visioning in September and a new strategic plan for the library is developing based on that meeting.

- Present at least 3 board development trainings to public library directors and boards, focusing especially on those libraries that have new directors or boards. *(McMullen, Henley, Reymer, Flick)*

(Originally reported December 2015) McMullen facilitated a library board conversation at North Lake County Public Library on planning, future projects, and resources available from the State Library. The conversation gave attendees a chance to listen to one another, identify themes for moving forward and answer specific questions together.

(Originally reported December 2015) Henley conducted a joint board orientation for Fallon County and Ekalaka library boards. In addition to normal board topics, the

issue of hiring and retaining a library director in Ekalaka was discussed, as this is an ongoing issue for this library.

(Originally reported December 2015) Reymer facilitated a library board training at Madison Valley County Library in Ennis for new and existing board members to familiarize them with the duties of their job and their role within the Montana library community.

(Update: June 2016) Henley conducted a board training in Glendive to address concerns and familiarize members with open meeting law and Library Directory access. Flick organized a 3.5 hour training event called "How to be Confident and Competent Regarding Performance Evaluations" at the Best Western GranTree Hotel in Bozeman on May 14th featuring Pat Wagner of SieraLearn as the presenter. Fifteen people attended, five of whom were public library trustees. Reymer facilitated workshops on *Introduction to Library Law and Ethics* and *Making Use of Resources* for Jefferson County library staff and board April 2016.

- Produce short, on-demand webinar trainings about creating high impact reports and presentations to tell the library story using data from the Public Library Statistics. *(McMullen, with other MSL staff)*

(Originally reported April 2016) McMullen presented training on the Montana Public Library Statistics gathering and reporting for library directors at the Broad Valleys Federation retreat. Librarians learned how to use the Montana Statistics Center to identify trends and demonstrate value to stakeholders. These trainings identify elements that will be used as models when creating on-demand webinar trainings.

(Update: June 2016) McMullen presented training on the Montana Public Library Statistics gathering and reporting for library directors at the Pathfinder Federation meeting on May 19.

- Continue to develop an MSC plan to address staff turnovers in MSC libraries, particularly schools to ensure that new staff receive information and training from MSC staff in a timely manner. *(Adams, Goodwin)*

(Update: June 2016) The MSC Executive Board has discussed ways to deal with this need at their board meetings this year. Board members can play a role in this effort. This objective will continue next fiscal year.

- Develop training curriculum for new MSC software and services in order to ensure consistent training resources are available to all MSC sites *(Goodwin)*

(Originally reported December 2015) The outline of the training curriculum is in place and will be integrated into the MSL training portal during its redesign process.

- Recruit trainers from the MSC membership to assist with the MSC training program in order to increase regional on-site training opportunities and share knowledge among MSC library staff members (*Adams, Goodwin*).

(Originally reported December 2015) Library staff has been selected to begin using the new statistics platform, BLUEcloud Analytics, and help MSC staff with the significant training curve necessary to effectively use the product.

(Originally reported December 2015) Library staff has been selected to begin using limited-access administrative accounts in Enterprise to learn how to carry out their own local customization and help train others. *Please refer to the April 2016 update below for additional information on the administrative tool and the Shared Catalog user front end.*

(Originally reported April 2016) MSC member library staff continue to meet and train with MSL staff on BLUECloud Analytics, and have created training exercises that will be made available to member libraries at upcoming MSC trainings planned for April-July 2016.

(Originally reported April 2016) The Enterprise catalog for all MSC libraries is managed using an administrative login that allows staff to make changes to library catalog landing pages for libraries using SirsiDynix's Enterprise content management system. The ability to limit login access to a particular library's profile was put into place by SirsiDynix in a recent software update, and Goodwin and Hazen took part in a SirsiDynix instructor-led training in December in order to be able to effectively teach MSC librarians how to use the Enterprise Administrative console. Two MSC libraries have been assigned administrative logins and SirsiDynix training in order to edit, maintain, and update their library catalog home pages using the Enterprise interface. These two beta test libraries will then be assisting with training the next group of libraries on how to manage their Enterprise catalog home pages. Additional Enterprise administrative access is planned to be created for several more MSC library sites within the next three months. This will allow member libraries to locally customize colors, links, and logos on their catalog landing page.

(Update: June 2016) Due to staffing changes and the MSC trainer position vacancy between February and May, 2016, progress on peer trainer recruitment has slowed. Despite this, MSC staff have recruited catalogers from two different MSC libraries to assist with trainings, one in May and an upcoming training in June. With the trainer position now filled, a new focus on collaboration and peer training will be launched by the new MSC Trainer. The Statewide Library Consultants may also participate in supporting libraries wanting to further customize their catalog interface.

- Recruit new participants for and coordinate the statewide Montana Name Authority Cooperative Funnel (NACO). This ensures that Montana-specific Name Authority Records for original works are being created in the Library of Congress and WorldCat. Organize a refresher training for interested Montana NACO Funnel members. *(Hazen)*

(Update: June 2016) Discussion of NACO funnel training took place at the MSC's Content Management Committee meeting in March, as well as following the Technical Services Futures Summit meeting in April. Hazen has begun recruitment for new NACO participants.

- Organize a train-the-trainer meeting over winter with MSL trainers to review the use of the universal evaluation instrument developed in FY15, make revisions as needed, and determine best practices for harvesting, analyzing and sharing information gathered with the tool. *(Flick)*

(Originally reported December 2015) MSL staff who regularly provide training are planning to meet in December or January. The universal evaluation tool has been in beta use since May, and several training staff has used it for a variety of different trainings: Summer Institute, Fall Workshops, onsite MSC trainings, board development trainings, webinars, Ready2Read Rendezvous. At the trainer's meeting, the form will be finalized with input from all the trainers and everyone will receive training on how to access the forms and process the resulting data.

(Originally reported February 2016) MSL trainers did not meet as planned, rather plans for an MSL trainers meeting have been pushed back until February or March.

(Originally reported April 2016) Sara Groves presented a 5 hour training on March 9 for MSL staff who regularly provide training. Her presentation evolved from the Mind in the Making training which she attended in November. Sara took the brain research approach to how children learn and extrapolated that information to apply to how to better train adult learners.

Goal Four—Consultation and Leadership

4. MSL provides consultation and leadership to enable users to set and reach their goals.

4.2. Advise Montana Library Directors and Trustees regarding administrative concerns, such as funding, budgeting, policies, and personnel.

4.3. Establish and maintain contact with Library Directors and Trustees, and other MSL partners, to remain cognizant of their needs and the challenges they face.

4.5. Provide leadership and support to identify and address key information gaps for MSL partners and patrons. Gaps may include but are not limited to early literacy, access to sustainable Internet and technology services, access to legal and medical information resources, job related services and services to seniors.

4.8. Facilitate more state-wide purchases of content, supplies, and programs that benefit all Montanans through their local libraries.

SLR Work Objectives:

- Assist the MSC Executive Board in their work to complete the MSC Strategic Plan and their review and update of MSC by-laws and contract. *(Adams and McHugh)*
(Originally reported December 2015) The membership approved the MSC Strategic Plan at their Spring meeting and the Executive Board, using survey results, are working on goals for the plan.
(Originally reported December 2015) The MSC membership approved revised by-laws and an updated member library contract during their Fall meeting.
(Originally reported February 2016) MSC member libraries are completing the signature process which includes signatures from both the library and the State Librarian.

(Update: June 2016) The MSC Executive Board will review the MSC Strategic Plan at their July 2016 retreat, focusing on the future of technical services processes in MSC libraries.
- Produce additional information resources for districts, such as a template of legally-mandated policies and guidance about board education. *(McMullen, Henley, Reymmer)*
(Originally reported April 2016) District directors have indicated that new resources are not needed at this time.
- Research and develop economic models intended to illustrate the benefits of shared administrative infrastructure in library districts, multi-library systems and other partnership arrangements. Examples might include: cost savings and efficiencies to be gained if county-wide standalone libraries merged into a single county library, or outsourced administrative services that could be provided for district libraries. This report will inform public library directors and trustees about options as they make future decisions for their libraries. *(McHugh, McMullen, Henley, Reymmer)*

(Update: June 2016) This objective was not accomplished, due to lack of staff time. It continues to be seen as a valuable effort and it is hoped that the SLR Director position will have more time to devote to this objective in the future.

- Update the SLR Learning Portal training resources related to public computing centers, to provide current information to public libraries as they offer this kind of resource to their communities. *(Reymer)*
- **(Update: June 2016)** Reymer has searched the web for up-to-date training resources and tutorials that would be useful to library staff and patrons in learning Windows 10, current Office suite software. Reymer feels that the quality of the materials currently available is lacking and will continue to investigate resources.
- Working with the Montana Library Association, develop a mentorship program to support new public library directors. This would create a partnership between experienced and new directors, offering increased support and possibly reducing chronic turnover in rural libraries. *(McMullen, Henley, Reymer)*
(Originally reported December 2015) Henley presented an overview to the MLA board and formed a committee to develop a strategy to implement this program. We will report back to the board in January and present a program at the MLA conference in April.
(Originally reported April 2016) Henley presented a mentor program proposal to the MLA board at their January meeting. The committee has developed guidelines and application forms which will be added to the MLA website prior to the April conference. A session at the MLA conference and an article in the April issue of the Focus newsletter will introduce the program and seek participants.

(Update: June 2016) Henley presented the mentor program in a session at the MLA conference in April and received valuable feedback. A report will be presented at the MLA June board meeting with the goal of handing the program over to MLA while continuing MSL involvement. The expectation is for MSL consultants to assist in making mentor-mentee matches, as well as using the Library Directory to track participant activity and CE credit.

Goal Five—Collaboration

5. MSL promotes partnerships and encourages collaboration among its users.

5.3. Assist users in developing 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).

5.5. Assist partners in developing web-accessible Montana-related digital content, and provide Montanans with access to digital collections and items relating to Montana's cultural heritage.

5.6. Promote library-related automation, data, networking standards, and web-scale solutions.

5.7. Work toward regional cooperative efforts, programs, and products that bring additional information value to Montanans.

SLR Work Objectives

- In partnership with MLA, develop a robust online community where Montana librarians, staff and trustees can share information and resources, solve problems together, and collaborate to provide better services in their communities. *(Lead: McMullen)*

(Update: June 2016) Several discussions within the MLA community have been held this year related to this effort. The Library Directory rewrite includes several user stories having to do with MSL creating shared communication tools and these ideas will be investigated as the rewrite work continues.

- Complete the MSC system policies reorganization effort. This work re-aligns the MSC with its original goals of enhancing optimum resource sharing and library development among MSC members and striving to keep MSC staff costs down. *(Adams, Marchwick, Hazen, Goodwin, Price)*

(Originally reported December 2015) This work is the high priority for Hazen and Marchwick and most of the remaining libraries have moved to the new system policies. Final reorganization work is scheduled to be completed by the end of this year, though a few MSC member libraries will need to delay until their local library board process for changes to circulation policies can be completed.

(Originally reported April 2016) Final phases of the system policies reorganization project are currently in progress by Goodwin, Hazen and Marchwick with completion on track for the end of June, 2016. MSC libraries are currently working on simplifying the shelving location policies in the system.

(Update: June 2016) Policies reorganization work is on track to be completed by the end of June, 2016. Some additional policies and circulation map work will continue into July, however the bulk of the project is on schedule.

- Encourage cataloging partnerships between MSC libraries with the aim to leverage the cataloging staff at larger libraries to help smaller libraries who do not have dedicated cataloging staff. (*Hazen*)

(Originally reported December 2015) Several serious discussions within the membership about this concept began during the MSC Fall Membership Meeting and those discussions continue. Efforts to clarify levels of cataloging needs within the membership and methods of sharing original cataloging work will continue in 2016.

(Originally reported April 2016). A "Technical Services Futures Online Summit" will be held April 29. There are several factors driving the need for the summit:

- Growing interest in increasing collaborative cataloging and collection development efforts
- Need for training and consulting, including how to successfully repurpose funding, staff, physical space
- Digital collections continue to grow, not requiring physical processing
- A need for the State Library to evaluate opportunities to direct resources in an impactful way to support scalable infrastructure for libraries statewide
- A continuing need for an improved Montana Shared Catalog with more local content and fewer issues with bibliographic records
- More efficiency within MSC libraries that reduce the number of technical services staff hours required for collection processing
- Have initial discussions about the future of technical services work within the MSC as this relates to the MSL Library Development Study Task Force Recommendations related to Collaboration, Library Infrastructure and Staff

Outcomes planned for this online discussion are to:

- Come to a mutual understanding of the roles of MSL and Montana Shared Catalog libraries within the area of the future of technical services, based around MSL Library Development services and platforms
- Create an initial set of benchmarks based on the current MSL Library Development Study Task Force Recommendations that will guide MSL and MSC libraries as they drive changes within both training curriculum and software platforms
- Share the benchmarks with the MSL Network Advisory Council for them to consider as they continue to evaluate opportunities and necessary resources to implement the larger LD Study task force recommendations

MSC library directors will share their experiences and planning efforts related to the future of technical services processing and MSL staff will provide information on areas for improvement within the MSC platform. Following discussion, the participants will collaborate on an initial set of benchmarks as a next step in this process. Outcomes will also be shared with the MSC membership at its May meeting.

(Update: June 2016) The online Technical Services Futures Summit was held on April 29. MSC library directors shared their experiences and a variety of interesting and lively conversations arose. Following this summit, the MSC Executive Board approved the creation of a subcommittee who will work to define collaborative cataloging and collection development as they pertain to the MSC platform, as well as further explore the comments and suggestions gathered at the summit. The summit can be viewed online through the MSL Learning Portal and includes a survey for participants that will further inform the work of the MSC staff and the MSC Executive Board.

- Produce resources about the creation of library branches, including existing documents and suggestions for best practices. The branch option may in some cases offer greater access to library services in smaller communities, at lower costs, and increase usage of statewide resources. *(Henley)*

(Originally reported April 2016) Henley is currently collecting documents from libraries that have gone through the process of creating a branch library and visiting with directors who have been involved in this process as a first step in producing resources in this area.

Goal Six—Sustainable Success

6. MSL is efficient and effective (measured against partner and patron outcomes) and is engaged in fulfilling its mission.

6.3. Evaluate new and continuing content and services against MSL's mission and long range plan.

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

6.7. Foster staff members' value and satisfaction in their achievements and their contributions to MSL's mission.

6.8. Diversify MSL's staff knowledge, skills and abilities.

6.9. Develop the leadership and management skills of MSL staff.

6.11. Provide for an information technology infrastructure which insures industrial strength capacity, and reliability.

SLR Work Objectives:

- Work together to provide additional and more consistent training on the content of our SLR webpages with the goal of significantly increasing the ability of all SLR staff to quickly, efficiently and successfully find answers on the SLR site to questions they are asked by external users, instead of passing the question on internally, wherever possible. *(Lead: McHugh)*

(Update: June 2016) SLR staff have contributed content to and participated directly in the design of the new SLR Portal webpages, leading to a better understanding of the overall site. Web leads representing the different sections of the site have worked together to achieve more consistency in the delivery of content across LD projects. Decisions on naming various navigational areas of the site has also improved the ability to successfully find answers.

- Renew our focus on improving the existing SLR website to make the information and format on the individual project pages more consistent, where relevant. *(Lead: McHugh)*

(Originally reported December 2015) The SLR-LD staff managing statewide projects (Orban, Adams and Birnel) and the staff focused on library development, consulting services and training (Henley, McMullen, Reymer, Flick and Colleen Hamer) met separately to identify ways to make standard, common information on their pages more consistent and to review the overall flow of these two major sections of the Library Development pages under the "Services to Libraries" sections of the MSL site. Reorganization of the content under Statewide Projects and under Library Development has happened and is continuing in order to meet this goal.

(Originally reported December 2015) The SLR-LD web leads, Orban, Henley and Flick, have met regularly with SLR-LD staff to discuss the layout, organization and design of the SLR portal pages as part of the upcoming move to the new design. These web leads will begin meeting with McHugh monthly to communicate discussions and come to decisions on changes where needed. The November decisions included selecting the content for four navigational tiles and investigating the possibilities of a customized search box for SLR-Library Development content.

(Originally reported February 2016) All MSL publications related to SLR-LD have been migrated to html format. These publications include the New Library Directors Handbook, the Federation Notebook and the Trustee Manual, as well as others listed at

http://libraries.msl.mt.gov/consulting/online_publications This change will enable staff to make changes as needed to these publications in real time, while still ensuring that users can easily download or print the material if desired.

- Create a standardized, consistent approach to managing directories and content on the internal SLR drive so that information available there is more easily retrieved. This work will include instituting appropriate archiving practices. *(Lead: McHugh)*
(Originally reported December 2015) Jim Kammerer shared an update regarding appropriate archiving practices with the SLR-LD staff during one of our monthly meetings. Once the MSL website redesign is completed, we will look to the organization of the content on the SLR portal to inform our approach to managing and organizing directories and content on the SLR drive.
(Originally reported February 2016) This effort will begin following the launch of the Records Management guidelines Kammerer is in the process of creating, so that files on the SLR drive reflect agency wide archiving practices and needs.
(Update June 2016) This work will continue in the next fiscal year.
- Create an internal tool using OneNote software to better manage internal communication and planning related to specific internal SLR efforts, such as news and announcements, reports and work plans and event planning. *(Lead: McHugh)*
(Originally reported December 2015) SLR-LD meetings and events are now planned and organized via OneNote notebooks that enable those participating to add to agendas, post additional materials and plan for events.
(Originally reported February 2016) Birnel, Marchwick and Diane Papineau are sharing tips and tricks for optimizing use of OneNote at a January 27 training session for all MSL staff.
- Complete the process of adding all remote SLR staff to the virtual desktop environment to significantly improve staff ability to easily and quickly access the same internal storage used by Helena based staff. *(Lead: McHugh)*
(Originally reported December 2015) cMullen and Henley now have virtual machines. Reymer and Marchwick will receive their new machines as soon as MSL receives a replacement server that is necessary to provide a virtual desktop environment to these additional remote staff.
(Originally reported February 2016) Marchwick has been moved to a virtual machine. Reymer is scheduled to be moved at the end of January.
(Originally reported April 2016) Reymer's move is now scheduled for March, to test a new server environment that includes the ability for remote staff to access their virtual desktop on mobile devices. Reymer will participate in this testing process.

(Update: June 2016) Reymer's move is delayed until this summer, pending her move to a new workstation.

- Continue to work with other MSL managers to identify a possible project management tool that will be available to all staff for the purpose of implementing and managing various pilots, projects and programs of all kinds, as needed. *(Lead: McHugh)*

(Update: June 2016) Though the use of OneNote has addressed some needs of staff, a more robust communication and planning tool that encourages deeper collaboration is still desired by the staff. It is hoped that this effort will continue next fiscal year.

- Provide at least one training session for SLR staff to lead them through the new LSTA reporting process. *(Orban)*

(Originally reported December 2015) Orban met online with Adams, Birnel, Flick, Christie Briggs and McHugh on November 4 to lead them through the changes pertinent to their reports in the new LSTA State Program Report format. Orban has prepared and distributed spreadsheets for each of the project managers outlining data and narrative information to be compiled for the report, which is due January 29.

(Originally reported February 2016) SLR staff completed work on the FY14 LSTA report in January.

- Evaluate future hardware requirements for the MSC system and explore the possibility of using virtual machines or hosted services. *(Leads: Adams, Price, Marchwick, McHugh)*

(Originally reported December 2015) Adams began the discussion with the MSC Executive Board during their Summer Retreat in Darby in July and again during the MSC Fall Membership Meeting. The value of future hardware needs and potential hosting was underscored when MSC Staff spent a considerable amount of hours over the summer to replace aging local hardware (power supplies and data storage units).

(Originally reported December 2015) A hosted service was implemented with SirsiDynix for replacing the now, out-of-service Windows 2003 server that was running Directors Station.

(Originally reported April 2016) At its May meeting, the MSC membership will be informed about the costs of a future move of MSC hardware to the State Data Center as one option for hardware location in the future. The upcoming fiscal year is the time for the consortium to investigate both this option and a move to a SirsiDynix fully hosted environment. Costs, transaction speed around the state, back up reliability and access are some of the considerations the consortium members and MSC staff will be exploring.

(Update: June 2016) MSC member libraries were informed of the future move of MSC hardware to either the State Data Center or the SirsiDynix hosted environment. Member libraries have been asked to participate in a testing process to examine SirsiDynix's "Saas" (Software as a Service) hosting option.

- Develop a plan to harvest certification application data and CE tracker data in order to create a report schedule and a statistical analysis plan. This schedule and plan will inform SLR staff about the trainings in which librarians are engaging and current training needs. *(Leads: Flick, Price)*

(Originally reported December 2015) Flick has included the harvesting request in the Library Directory "user stories" currently being compiled as part of the Directory rewrite process.

(Update: June 2016) Flick recently received a request from a library director for current status of her staff certification. Colleen Hamer was able to harvest the data as it exists, but this request proves the need for library directors to access this information themselves. Hamer and Flick have determined that with so much turnover in library directors across the state, information about when a library director starts their new position must be included in their profile in the Library Directory so that when their grace period expires, MSL staff can take action to remedy the lapse. Formerly, MSL staff relied on the CE Coordinator and the Statewide Consultants innate knowledge and awareness to identify any directors that failed to attain certification within four years. That process is now being formalized and is part of the Directory rewrite work that will continue this summer.