

Montana State Library

Library Services and Technology Act (LSTA)

Grants to States Program Implementation Evaluation

Federal Fiscal Year 2018 - Federal Fiscal Year 2022

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Commissioned by: Montana State Library

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TABLE OF CONTENTS

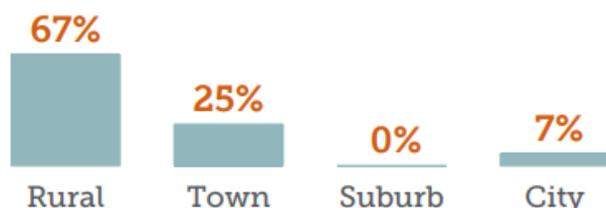
| | |
|---|-----------|
| EVALUATION SUMMARY | 1 |
| EVALUATION REPORT | 6 |
| <i>Goal 1 Retrospective Assessment - Collaboration</i> | 9 |
| <i>Goal 2 Retrospective Assessment - Outreach/Lifelong Learning</i> | 15 |
| <i>Goal 3 Retrospective Assessment - Community Leadership</i> | 19 |
| <i>Goal 4 Retrospective Assessment - Internet Access</i> | 21 |
| <i>Goal 5 Retrospective Assessment - Adequate Support</i> | 22 |
| <i>Retrospective Assessment Questions A-2 and A-3</i> | 25 |
| <i>Process Questions B-1, B-2, and B-3</i> | 26 |
| <i>Methodology Questions C-1, C-2, C-3, and C-4</i> | 27 |
| APPENDICES | 31 |
| Appendix A: Acronyms | 31 |
| Appendix B: Interviewees/ Focus Groups | 32 |
| Appendix C: Bibliography of Documents Reviewed | 33 |
| Appendix D: Focus Group Questions | 35 |
| Appendix E: Web-Survey Instrument | 37 |
| Montana LSTA Survey | 37 |
| Montana Memory Project | 42 |
| Montana Shared Catalog Survey | 44 |
| Appendix F: Measuring Success Crosswalk Table | 47 |
| Appendix G: Targeted Audiences Crosswalk Table | 48 |
| Appendix H: Expenditure Tables | 49 |
| Appendix I: Web-Survey Reports | 50 |
| Montana LSTA Summary | 50 |
| Montana Memory Project | 58 |
| Montana Shared Catalog Survey | 63 |
| Appendix J: Hotspot impact | 70 |

EVALUATION SUMMARY

Summary Introduction

Given Montana's population of 1,084,225¹, the state's annual Library Services and Technology Act (LSTA) Grants to States² program allotment from the Institute of Museum and Library Services (IMLS) of approximately \$ 1.2³ million per year translates into \$1.06⁴ per person on an annual basis. LSTA funds alone are inadequate to meet the library and information needs of Montana's approximately 1.1 million residents. The Montana State Library (MSL) challenge is to find ways to make \$ 1.06 per person transformative in terms of library services; to leverage a relatively small amount of money to accomplish major results by strategically deploying funds and leveraging other public and private monies in support of high-quality library and information services.

Public Library Outlets by Locale



There are five goal statements in the Montana State Library's **2018-2022 Library Services Technology Act (LSTA) Plan**.

They are:

GOAL 1: Collaboration - The Montana State Library encourages, plans, implements, and supports libraries with collaborative efforts.

GOAL 2: Outreach/Lifelong Learning - The Montana library community, through its interconnectedness, helps community members understand that libraries are for their lives right now as well as for their lifetimes.

GOAL 3: Community Leadership - Librarians, advisory members, and board members listen to their community members to design library services that make a difference in the community while continuing to bridge digital/traditional library services.

GOAL 4: Internet Access - Every Montanan has access to the Internet.

¹ United States Census Bureau, Decennial Census (April 1, 2020)

² The report will refer to the Library Services and Technology Act Grants to States program simply as LSTA throughout this report

³ Four year LSTA Grants to States allotment average ((FFY [Federal Fiscal Year] 2018 State Allotment + FFY 2019 State Allotment + FFY 2020 State Allotment + FFY 2021 State Allotment) / 4)

⁴ Four year LSTA Grants to States allotment average / United States Census Bureau Decennial Census (April 1, 2020)

GOAL 5: Adequate Support - Library community has adequate and stable support to provide the best library service possible.

Retrospective Question A-1 Summary

Agency's Internal Assessment and Evaluators' Assessment

As part of the assessment process, the evaluators asked the Montana State Librarian, MSL's LSTA Coordinator and other key staff identified by the State Librarian to offer their joint appraisal of progress their agency had made toward achieving each of the five goals included in the Montana State Library's 2018-2022 five-year plan. The evaluators prefaced their request for this internal assessment by noting the fact that the state was only three years into the implementation of the five-year plan. Consequently, it was acknowledged that it was unlikely that any of the goals would be completely or finally achieved.

Table 1 offers a summary of both the Montana State Library's internal assessment and the evaluators' conclusions.

| Table 1 - Montana State Library's and Evaluators' Assessment of Achievement | | |
|--|--|-------------------------------|
| | Montana State Library's Internal Assessment | Evaluators' Assessment |
| GOAL 1: Collaboration - The Montana State Library encourages, plans, implements, and supports libraries with collaborative efforts. | Achieved | Achieved |
| GOAL 2: Outreach/Lifelong Learning - The Montana library community, through its interconnectedness, helps community members understand that libraries are for their lives right now as well as for their lifetimes. | Partly Achieved | Partly Achieved |
| GOAL 3: Community Leadership - Librarians, advisory members, and board members listen to their community members to design library services that make a difference in the community while continuing to bridge digital/traditional library services. | Partly Achieved | Partly Achieved |
| GOAL 4: Internet Access - Every Montanan has access to the Internet. | Partly Achieved | Partly Achieved |
| GOAL 5: Adequate Support - Library community has adequate and stable support to provide the best library service possible. | Partly Achieved | Achieved |

Evaluators' Goal 1 Summary

GOAL 1: Collaboration - The Montana State Library encourages, plans, implements, and supports libraries with collaborative efforts.

Goal 1 expenditures represent 39.66 percent of Montana's total LSTA allotment for the FFY 2018 – FFY 2020 period. These expenditures cover three projects, all of which continued from the prior LSTA funding cycle and carried through the three years of evaluation in the current cycle. *Information Access* accounts for 21.87 percent of funding over the three-year period. *Montana Memory Project* accounts for 10.01 percent of funding, and *Downloadable E-Content* accounts for 7.79 percent of funding. In a group discussion, the stakeholders emphasized the importance of these funds, which support access to more content and this finding came through strongly and clearly through the survey results as well.

The evaluators conclude that the Montana State Library has ACHIEVED Goal 1. The level of engagement with these online resources are making the Information Access vision for this goal a great success. Even though this is a rather aspirational goal, the evaluative work on the MSC and the process of evaluating and launching the new platform for the MMP while maintaining high levels of engagement, and pivoting successfully with social media engagements, support the evaluators' judgement that this goal is achieved.

Evaluators' Goal 2 Summary

GOAL 2: Outreach/Lifelong Learning - The Montana library community, through its interconnectedness, helps community members understand that libraries are for their lives right now as well as for their lifetimes.

Goal 2 expenditures represent 23.86 percent of Montana's total LSTA allotment for the FFY 2018 – FFY 2020 period. These expenditures cover two projects, all of which continued from the prior LSTA funding cycle and carried through the three years of evaluation in the current cycle. Montana Talking Book Library (MTBL) accounts for 16.53 percent of funding over the three-year period. *Lifelong Learning* accounts for 7.32 percent of funding.

The evaluators conclude that the Montana State Library has PARTIALLY ACHIEVED Goal 2. Much progress was made towards this goal through continuing education and training activities, new and innovative ways of outreach especially during the pandemic (the Meme and Writing Contest definitely noteworthy), and through partnerships with other state agencies and state businesses. This goal is a rather aspirational goal the way it was framed in the plan.

Evaluators' Goal 3 Summary

GOAL 3: Community Leadership - Librarians, advisory members, and board members listen to their community members to design library services that make a difference in the community while continuing to bridge digital/traditional library services.

Goal 3 expenditures represent 8.85 percent of Montana's total LSTA allotment for the FFY 2018 – FFY 2020 period. These expenditures cover one project, *Continuing Education*. Under this project, the following activities took place: *Trustee Training, Online Learning Cohorts, ASPeN Continuing Education Development, MSL Workshops and Collaborations, Summer Library Leadership Institute, Strategic Plan Pathway Pilot, Strategic Track for Montana State Library Certification, and Fall Workshops*.

The evaluators conclude that the Montana State Library has PARTIALLY ACHIEVED Goal 3. The activities supported progress for this goal but much work still needs to take place here. Among the successes include continuing education partnership with Humanities Montana on a civic engagement that includes all types of libraries.⁵ Much of this work has started though still in progress, therefore we noted this goal as partially achieved. The staff time and resource constraints were also noted here, especially the need for formal user experience studies and implementation to make the various wonderful dashboards MSU has created more user friendly and easily navigable.

Evaluators' Goal 4 Summary

GOAL 4: Internet Access - Every Montanan has access to the Internet.

No projects and funds are reported for this goal. Even though there were no projects listed under LSTA funding for this goal, the MSL sponsored a study that provides a detailed picture on the network connectivity in Montana. Additional funding and activities outside LSTA also took place in this area. Also, related activity under Goal 5 in the SPR contributed to the partial success of this goal (the e-rate consultant assisted a private vendor with completing the Toward Gigabit Libraries Internet 2.0 Toolkit for every public library and branch in Montana in FY19).

The evaluators conclude that the Montana State Library HAS PARTIALLY ACHIEVED Goal 4. As to whether the goal of having the internet in every corner in Montana is within reach, the geography of the state still makes this an aspirational goal as of the date this evaluation is completed. Improving Internet connectivity is not really a project (with a start, middle, and end) but an ongoing process that needs to adapt and scale over time. The activities also require willing and able participants; for various reasons, improvements for all are unlikely to occur at the same time. That said, the MSL is encouraged to retain this goal and continue to mark inroads (as it has in the past several years) and continue marking the significant impacts it has achieved both inside Montana and as inspiration for the rest of the country.

Evaluators' Goal 5 Summary

GOAL 5: Adequate Support - Library community has adequate and stable support to provide the best library service possible.

⁵ <https://www.humanitiesmontana.org/democracy-project-for-library-staff/>

Goal 5 expenditures represent 23.82 percent of Montana's total LSTA allotment for the FFY 2018 – FFY 2020 period. These expenditures cover the single project of Consulting Services. This project includes the following activities: *Support for Libraries, Public Library Statistics Preparation and Outcomes Communication, Community-Led Planning, E-Rate Consultation and Internet Speed Improvement, Mobile Hotspots/ Mobile Device Service for Libraries, Governance Models.*

The hotspot program was and is a great success. Overall circulation and data usage for this program has continued to increase. Yet, the most telling and impactful story of these hotspots comes in the form of a priest being able to offer a funeral service using one of these hotspots to a family who lost their loved one and bring closure to their anguish during the COVID-19 time of loss and sorrow that affected so many people (Appendix J). The evaluators conclude that the Montana State Library has ACHIEVED Goal 5. Between the consultant efforts, the successful pivoting, the leveraging of LSTA funds with other funding sources, and the impactful stories on the ground, we conclude that this goal is achieved.

Retrospective Question A-2 Summary

A-2. To what extent did MSL's Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?

MLS's Five-Year Plan focuses heavily on Information Access and Institutional Capacity (Appendix F) as the top two focal areas, and to a lesser degree on Human Resources. Appendix F provides a detailed mapping to LSTA focal areas and intents on a project by project basis. The results achieved are in line with the national priorities associated with the Measuring Success framework and their corresponding intents.

Retrospective Question A-3 Summary

A-3. Did any of the following groups represent a substantial focus for MSL's Five-Year Plan activities? (Yes/No)

Only two projects reached the 10 percent expenditure threshold identified by IMLS as representing a substantial focus on a specific identified group. **Information Access** accounted for 21.87 percent of total expenditures during the evaluation period, representing *library workforce*. **Montana Talking Book Library** accounted for 16.53 percent of total expenditures during the evaluation period, representing *individuals with disabilities, children, school-aged youth, and seniors*.

In conclusion, libraries in Montana are exploring many new ways and opportunities and some things will forever change as a result of the pandemic, and the State Library is well positioned to help them.

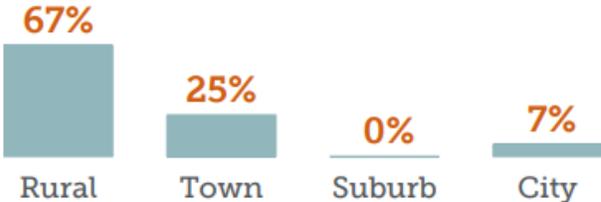
EVALUATION REPORT

Undeniably, the COVID-19 pandemic affected every aspect of our lives including the way libraries operate and function. In the midst of the 2018-2022 LSTA evaluation period, the pandemic and the way it affected libraries shed a prominent light on the work and importance of state library agencies. In normal times, libraries are busy serving those coming through their doors, but during these times of crisis, libraries were seeking answers to questions that the Montana State Library (MSL) helped them explore. During these trying times, MSL staff convened frequently and regularly over zoom, facilitated discussions, and helped establish solutions with their colleagues across the state. But how all this work fared in relation to the goals originally established in the five-year plan is the question we are answering with this report written at an unprecedented time in the history of the Montana libraries and the world.

Evaluation Introduction

Given Montana’s population of 1,084,225⁶, the state’s annual Library Services and Technology Act (LSTA) Grants to States⁷ program allotment from the Institute of Museum and Library Services (IMLS) of approximately \$ 1.2⁸ million per year translates into \$1.06⁹ per person on an annual basis. LSTA funds alone are inadequate to meet the library and information needs of Montana’s approximately 1.1 million residents. The Montana State Library (MSL) challenge is to find ways to make \$ 1.06 per person transformative in terms of library services; to leverage a relatively small amount of money to accomplish major results by strategically deploying funds and leveraging other public and private monies in support of high-quality library and information services.

Public Library Outlets by Locale



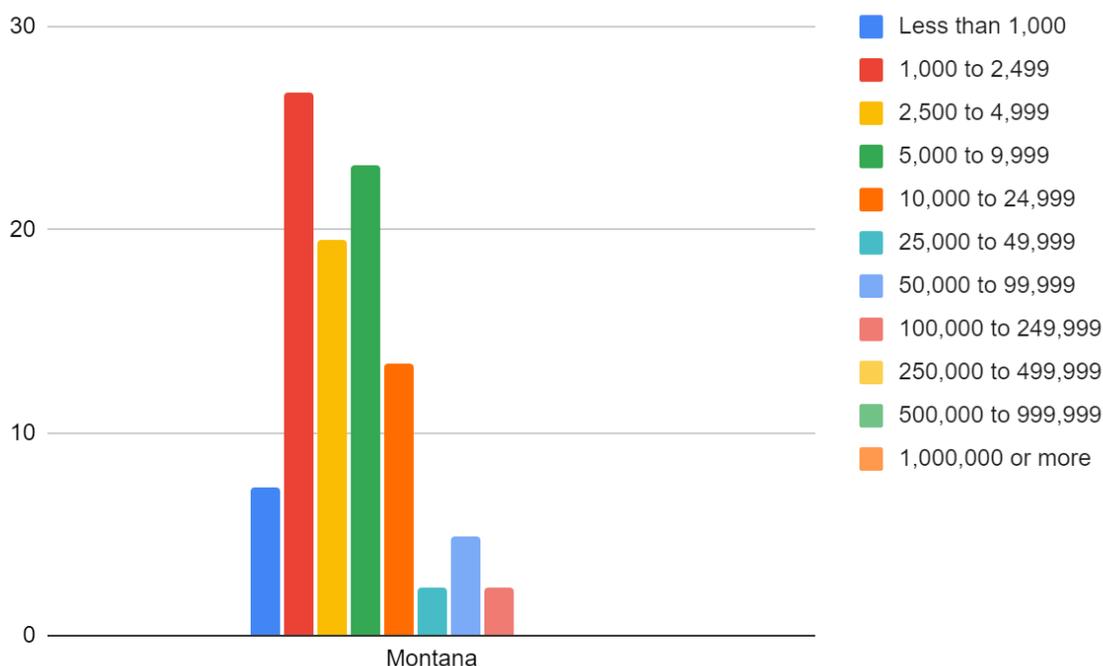
The 2019 Public Libraries Survey (PLS) reported that Montana had a total of 82 public library jurisdictions employing 230.47 full-time equivalent (FTE) staff categorized as librarians (72.92 FTE are reported as having an American Library Association [ALA] accredited Master’s degree); similarly, the Academic Libraries Survey (ALS) reported that 22 institutions of higher education employ 71.15 FTE librarians. According to the National

⁶ United States Census Bureau, Decennial Census (April 1, 2020)
⁷ The report will refer to the Library Services and Technology Act Grants to States program simply as LSTA throughout this report
⁸ Four year LSTA Grants to States allotment average ((FFY [Federal Fiscal Year] 2018 State Allotment + FFY 2019 State Allotment + FFY 2020 State Allotment + FFY 2021 State Allotment) / 4)
⁹ Four year LSTA Grants to States allotment average / United States Census Bureau Decennial Census (April 1, 2020)

Center for Educational Statistics' (NCES) Elementary/Secondary Information System (EISi), Montana's 485 public school districts employ 372.71 full-time librarians.

Total FTE library staff is about 368 in 123 public library Outlets, the majority of libraries (67 percent) are in rural environments. Montana is a rural state. To understand the rural character of Montana, it is important to note that more than half of the libraries in Montana serve communities with populations less than 5,000 (PLS Fiscal Year 2019).

PLS Table 1A. Percentage distribution of public libraries, by population of legal service area and state: Fiscal year 2019



State funding is provided in statute to strengthen public library services for all Montanans. The Montana State Library administers federation funds and distributes these funds to public libraries as directed in statute and the Administrative Rules of Montana. Montana public libraries often make use of this funding to participate in LSTA-supported projects of the State Library, such as this **Match-Only State Project**.

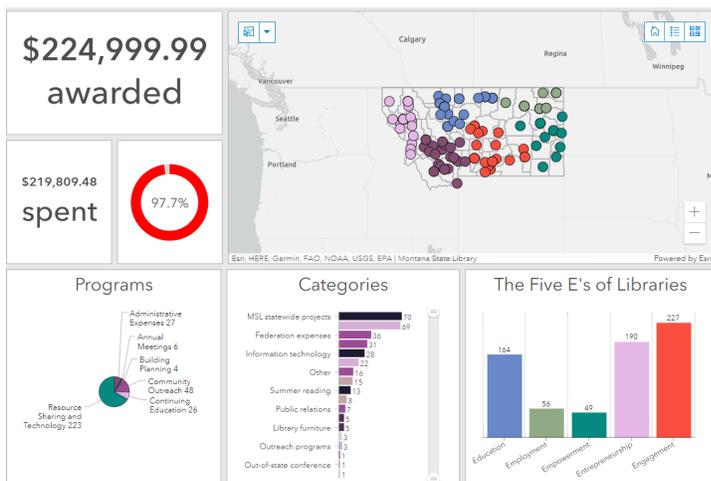
Montana's libraries are grouped into six regions known as federations. Federations receive base grants as described in the Montana Code. Funding comes from the State's Coal Severance Tax Shared Account, and grants are distributed through the State Library based on a formula established in the Administrative Rules of Montana (ARM 10.102.5102). Montana's library federations provide formal and informal opportunities for continuing education, networking, and improving library services in Montana. Originally, only public libraries participated in federations. In 1999, the Legislature expanded the law to allow all types of libraries to participate in the federations, including school, academic, and special libraries. However, with a few exceptions

that are eligible through the federation Plans of Service, only public libraries receive federation funds.

The Network Advisory Council (NAC) represents the interests of all types of Montana libraries and maintains the perspective of statewide geographical balance as it explores technology resources, assists with the official procurement process of those resources, reviews and evaluates the feasibility, design, and outcomes of statewide library projects, assists with statewide planning, and advises the State Librarian and the State Library Commission as appropriate. The NAC met four times during this reporting period.

In FY20, The State Library Commission re-structured the Network Advisory Council in April 2021. The new council is smaller and focuses on knowledge, skills, and abilities rather than library type representation. The Commission maintained the geographic balance. The Commission charged the NAC with creating a structure to support the Commission’s goal of “All Montanans receive library services sufficient to their needs.” The NAC is currently creating committees focused on core services used by Montanans. They have charged the committees with reviewing barriers to usage and focusing on the future. These committees will prepare funding proposals and make policy recommendations that the NAC must prioritize.

Library Federation Meetings, the sole activity in this category, requires each of the six



federations to hold two membership meetings during the reporting period, one in the fall and one in the spring. Libraries were expected to attend these meetings, which provide an opportunity for communication, continuing education, and planning. The goals of each federation were specified in their plans of service, which were created by federation libraries and submitted to the State Library commission for approval prior to implementation. Plans of service included objectives for meeting

community needs through interlibrary loan, technology, cooperative purchases, and continuing education and training.

According to statute, each federation has a board of trustees; the majority of members must be public library trustees. Each federation has a coordinator who is chosen from one of the member libraries. The federation coordinator was responsible for facilitating all federation activities, including organizing the federation meetings, plan of service, annual report, and continuing education activities. At the end of the fiscal year, each federation coordinator submitted an annual report for their respective federations based on the individual reports submitted by libraries in those federations. MSU monitors performance through online

dashboards that provide much details on the engagement with the libraries.¹⁰ Overall, the needs of the library in Montana are great on all fronts and the LSTA program is holistic focusing on collaborations, outreach and lifelong learning, community leadership, internet access and adequate support.

There are five goal statements in the Montana State Library’s **2018-2022 Library Services Technology Act (LSTA) Plan**. Each of the goals is stated below and LSTA-funded activities carried out in support of the goal are described. Finally, the evaluators’ assessment of whether each goal has been achieved, partly achieved, or not achieved is presented.

Goal 1 Retrospective Assessment - Collaboration

GOAL 1: Collaboration - The Montana State Library encourages, plans, implements, and supports libraries with collaborative efforts.

Goal 1 Description and Discussion

Following are the titles of the projects and the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on activities undertaken in support of Goal 1.

| PROJECT TITLE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL |
|------------------------|--|
| Information Access | \$ 736,854.65 |
| Montana Memory Project | \$ 337,221.75 |
| Downloadable E-Content | \$ 262,421.71 |
| GOAL SUBTOTAL | \$ 1,336,498.11 |

Goal One, Collaboration, received \$1,336,498.11 in LSTA funding, 39.66 percent of Montana’s total LSTA funding for FY18–FY20. The bulk of this funding, \$726,854.65 (55.13 percent of the Goal One funding and 21.87 percent of the state’s total LSTA allotment), went to activities that fell under the **Information Access** initiative. One of the Montana State Library’s top priorities is to develop and advance resource sharing opportunities among Montana libraries, and Information Access activities worked toward fulfilling this goal. This project includes activities like the *Montana Shared Catalog (MSC)*, *Physical Delivery of Materials*, *Interlibrary Loans via OCLC*, *Cataloging Standards and Procedures* and *New Library Onboarding*.

The Montana Shared Catalog is a collaborative effort between libraries statewide to provide Montanans with equal access to books, movies, and more, whether they live in large, small, urban, or rural communities. Prairie County Library has a budget of \$53,700 and serves a population of 1,180, yet the library’s patrons have the same access to resources as patrons of the Billings Public Library which has an annual budget of \$3.5 million and serves a population of

¹⁰ MSL Federation Reports: https://about.msl.mt.gov/publications/federation_reports

141,250. MSC is a consortium of 175 multi-type libraries that share, at minimum, an online catalog and system administrator staff. The libraries that enjoyed the greatest benefit from MSC membership also participated in sharing groups, these groups allowed library patrons to seamlessly place holds on items from dozens of libraries around the state and pick up their items soon afterward. The Partners sharing group of libraries connects users to the items they want in communities across the state, from Glendive to Libby.

| Information Access | 2018 | 2019 | 2020 | MEAN |
|---------------------------------------|-----------|-----------|-----------|-----------|
| # MSC patrons statewide | 403,305 | 419,462 | 400,241 | 407,669 |
| Total MSC circulation statewide | 5,930,967 | 4,408,552 | 3,977,107 | 4,772,209 |
| Courier items as a % of total circ | 7.60% | 8.66% | 11.43% | 9.23% |
| OCLC Group Services - # libraries | 279 | 277 | 277 | 278 |
| # bib records added/update | 127,623 | 97,465 | 119,017 | 114,702 |
| # items sent in transit to fill holds | 452,132 | 381,823 | 454,405 | 429,453 |
| # OCLC ILL requests | 36,112 | 31,515 | 27,955 | 31,861 |

MSC libraries served 403,305 registered patrons and circulated 5,930,967 items in FY18 and though the number of registered patrons remained more or less at the same level, there was a noticeable decline in the number of items circulated which is one of the most notable effects of the pandemic. Under the *Physical Delivery of Library Materials* activity, this program was made cost effective through the use of a courier service, through which crates were packed with up to 30 in-transit hold items each and delivered from library to library. At \$5.00 per crate, the use of the courier for high-volume sharing was a much more cost-effective way of maximizing access than the traditional interlibrary loan process, which required items to be packaged individually and sent via mail at around \$3.00 per item. The courier service allowed for a cost of less than 20 cents per item sent. In 2018, 57 library locations participated in the courier service through 18 hub libraries. These libraries sent 452,132 items in transit, an average of 32,382 items per month. Though a slight blip occurred in 2019 partly due to the pandemic, by 2020 the level of activity was similar to the 2018 levels:

Courier and interlibrary loan services were temporarily suspended early in the pandemic, but libraries and library sharing groups such as MSC Partners resumed interlibrary sharing and physical delivery, with various levels of quarantine protocols in place, in summer 2020.

The *Holds Sheltering Pilot* activity, which occurred in FY20, was concerned with equity in materials access. It saw the MSC's largest reciprocal borrowing and resource sharing group, "Partners," conduct a pilot to determine the impact and feasibility of "sheltering" new items to help balance access to those materials between patrons who primarily place holds and patrons who primarily browse the shelves. The pilot lasted 6 months and had two phases to test different sheltering options, with all 37 Partners libraries participating. Sheltering involved configuring new items to only be holdable at the owning library for a period of time, with holds later being opened to the entire group. MSC System Administrators collected and analyzed system data during the pilot and solicited evaluations from librarians and library patrons; over 700 patron

responses were collected. Results were unavoidably impacted by COVID-19 library closures but were analyzed in conjunction with historical data and trends.

During the pilot, average hold fulfillment time decreased significantly and the circulation of new item checkouts increased, with extra growth in the number of new items being checked out at their owning libraries. Patron responses tended to follow along with their preferred method of getting new items. Patrons who placed holds felt that sheltering had a negative impact on their library experience, while patrons who preferred to browse felt it had a positive impact. MSC system administrators presented this analysis to the sharing group with recommendations for future implementation, including options for no sheltering and for optional sheltering. The sharing group eventually decided to allow optional sheltering for 28 days, with sheltering items filling local holds. Staff also implemented an automated system to move items out of sheltered status after 28 days to help alleviate the extra steps involved in sheltering.

Outcomes of the Information Access project included greater convenience and ease of use for patrons, increased levels of service and sophistication of features, faster access to a larger collection through resource sharing and easier hold placement, access to consortium-based records from other libraries, collaborative support solutions and support access from MSC staff. Libraries participating in collaborative efforts provided better collections for their patrons through increased resource sharing and/or offering more materials in a variety of formats, resulting in improved library services for their communities.

QualityMetrics implemented an online survey of MSC and we secured 1,632 responses in the month and half we had the survey open (Appendix I includes more detailed results). The survey was short and to the point and a great success given the low response rates we have seen with the more traditional LSTA program surveys. The success of this online survey as well as the one implemented with the Montana Memory Project highlighted how important it is to have point of use surveys for LSTA funded projects as well as summative follow up data gathering protocols. Respondents value the Shared Catalog as these quotations exemplify:

Because my library's collection is limited, and my interests tend to be broad and somewhat out of the mainstream, it is helpful to be able to draw on the Montana Shared Catalog to find a book that I need. Often, the catalog finds books for me at UM or MSU libraries, for example.

Becoming aware of the resources and their availability from my desk at home is enormously valuable. I can search and request from home and pick up what I requested when I am notified.

The purpose of the **Montana Memory Project (MMP)**, which received \$337,221.75 (25.23 percent of the Goal One allotment and 10.01 percent of the state's total LSTA funding), is to support and provide free access to digital collections of items relating to Montana's cultural heritage and government. MMMP works with libraries and museums to digitize and preserve Montana's memories. Libraries, museums, local government agencies, and historical societies across Montana have contributed content to this project. In FY18, the Montana Memory Project Director traveled over 4,481 miles to conduct outreach visits throughout the state. The agency structure was also flattened in FY18, placing the project director in the library's User Services

Group. In FY19, the Montana Memory Project Director traveled over 762 miles to conduct outreach visits throughout the state; however, due to COVID-19 restrictions, many in-person meetings and activities were changed to a virtual setting. In FY20, the director was unable to travel to conduct outreach visits due to the pandemic, and in-person meetings and activities were subsequently changed to virtual meetings.

The *Big Sky County Digital Network (BSCDN)* activity is crucial to the success of MMP. BSCDN is the Montana hub of the Digital Public Library of America (DPLA). The cohort is composed of 12 people representing the 5 institutions that channel content into the DPLA (contributing institutions include the Montana State Library (MSL), the Montana Historical Society, Montana State University, the University of Montana, and the North Dakota State Library). The following table captures a few key summary data for MMP. Overall, COVID-19 does not appear to have affected the MMP website use, collection, and digitization levels.¹¹

| Montana Memory Project (MMP) | 2018 | 2019 | 2020 | MEAN |
|-------------------------------------|-------------|-------------|-------------|-------------|
| DPLA users clicked on content | 4,091 | 4,839 | 4,278 | 4,403 |
| # digitized items | 2,003 | 3,400 | 3,110 | 2,838 |
| # digitized pages | 15,572 | 27,988 | N/A | 21,780 |
| Total collections in MMP | 158 | 172 | 184 | 171 |
| Total items in MMP | 64,502 | 66,164 | 68,959 | 66,542 |
| MMP Website visits | 139,995 | 208,326 | 335,900 | 228,074 |

Montana Memory Project Outreach is the activity that brings MMP to the attention of its audience. The project director participated in outreach opportunities. These outreach efforts were intended to raise awareness of the MMP as a public resource for Montana cultural heritage and historical content. Also in FY18, the director launched the MMP Ambassadors program. The ambassadors, a group of public representatives, helped educate the public on how to use the MMP. Ambassadors held 12 events during the reporting period, with each event averaging an hour in length. A total of 338 people were reached during these events. Outreach also occurred through the media: one ambassador was interviewed for a local news station, while another presentation led to a newspaper article about the MMP. In addition, the director made 12 visits to prospective contributors during the year. The focus of these visits was on assessing the eligibility of local collections for inclusion in the MMP, explanation of the digitization and metadata creation process, and the creation of a timeline for prospective implementation and training. Under the *Digitization of New Collections* activity, LSTA funds were used to digitize documents and books as captured in the table above. General edits to the MMP website occurred under the *Montana Memory Project Web Presence* activity over the period and a robust social media presence resulting in doubling the number of website visits over the period we are examining.

¹¹ Notwithstanding the limitations that discovery research has noted on the DPLA infrastructure, i.e. Google search engines are not indexing the content because it is based on metadata. See Kenning Arlitsch and Michael Delta Bitta, "[Is it Time to Give the Digital Public Library of America our Digital Objects?](#)" CNI Presentation, December 7-9, 2021.

In FY20, the *Montana Memory Project Platform Migration* commenced. MSL began a Request for Information to determine whether there were viable options to replace the MMP's current platform, CONTENTdm. Recollect was selected as the platform for the MMP. Content migration began in April 2021. Original high-resolution content files had been collected since 2019 and stored in a locally hosted digital archive. Metadata was exported from CONTENTdm and conformed or rewritten for Recollect, and many image files were converted to pdf to conserve space in the new platform. When the new site was launched in June 2021, 22,000 of 75,000 items had been migrated. Staff continue to work on the migration process and are working to add rights statements to items and collections. The new Recollect platform allows for multiple new ways for users to interact with content, including tagging, suggested edits, and crowd-sources transcription. These features will be available to users once the migration is complete. The director was also responsible for the *Training for MMP Contributors* activity.

MMP ran into heavy obstacles during the pandemic because traditional in person outreach was limited.. With COVID-19 restrictions canceling conferences and face-to-face interactions, the MMP staff had to work to engage patrons online and a successful pivot was made. This was accomplished by curating sets of content and sharing them via email, social media, and a new website page. Engagement ideas continue to be sent out on a weekly basis. MMP also launched the Montana Meme-ory Contest, with non-copyrighted materials. Submissions were sent by email and published in albums on Facebook. There was an album for each of the three age-group categories – 10-18, 19-40, and older. Facebook users were asked to vote for their favorites with likes. The Meme with the most likes in each of the three age group categories won. Approximately 31 memes were submitted for judging and an outstanding response was observed in the voting. Local organizations donated prizes for the top-place finishers in each category, which were mailed to the winners after the contest. This contest will now happen each year in the spring, with a writing contest planned for the winter.

QualityMetrics had great success in launching a web survey and collected 1,154 respondents. The survey provided insights on who uses MMP, their location (half of the MMP users responding were located in a school in Montana), level of awareness, and an understanding of what is valuable. Below are selected comments regarding the valuable aspects of this service (detailed analysis is presented in Appendix I):

Remembering the past. And always remembering pictures are worth a thousand words but it might take 10,000 to describe the picture!

The plethora of people and places that may not be known by folks in Montana, even lifelong Montanans.

Downloadable E-Content, the final Goal One project, received \$262,421.71 in funding (19.64 percent of the Goal One allotment and 7.79 percent of Montana's total LSTA funding). MontanaLibrary2Go (<http://montanalibrary2go.org>) is an online service that offers registered library patrons of participating libraries free access to contemporary, classic, and bestseller

audiobooks and ebooks (books in electronic, or digital, format). These books check out just like a physical book or audio CD, except that users can check them out at any time, from anywhere – an online library “to go.” Registered library patrons can download books to their electronic devices or computers, or they can read or listen to books in an online browser.

| MontanaLibrary2Go / Downloadable E-Content | 2018 | 2019 | 2020 | MEAN |
|---|-------------|-------------|-------------|-------------|
| Circulation (# of checkouts) | 1,171,696 | 1,309,163 | 1,406,197 | 1,295,685 |
| # eBooks checked out | 558,272 | 619,910 | 658,146 | 612,109 |
| # Audiobooks checked out | 613,424 | 689,253 | 748,051 | 683,576 |
| # items available for checkout | 42,340 | 51,214 | 61,757 | 51,770 |
| # patrons using Lib2Go | 110,720 | 111,412 | 120,949 | 114,360 |
| # new patrons | 11,568 | 13,938 | 12,538 | 12,681 |

The Montana State Library uses LSTA funds to cover the cost of the annual service hosting fee, which allows member libraries to participate at reduced costs. The Digital Library division of the Montana State Library has also made a concerted effort to create citizen access to digitized and born-digital state agency publications through its partnership with the Internet Archive. The Digital Library also provides professional development e-content for state employees and contractors and Montana library staff via OverDrive,¹² ProQuest Central, and Reference USA. During the reporting period, the library's structure was flattened, and the consortium director is now part of the Library's User Services group. The resource is used heavily as the following statistics indicate, and again, with no much slowing due to COVID-19: The number of Montanans making use of MontanaLibrary2Go increased during the grant period, as did their level of activity.

M.C.A. 22-1-212 obligates the Montana State Library to manage a state publications collection: “The state library shall administer a state publications depository library program to identify, acquire, catalog, preserve, and provide access to state publications.” The *Access to State Publication* activity oversees MSL's adherence to this law.

| Access to State Publications | 2018 | 2019 | 2020 | MEAN |
|---------------------------------------|-------------|-------------|-------------|-------------|
| # State publication web collection | 189,317,753 | 256,338,230 | 289,601,972 | 245,085,985 |
| # State publication web collection TB | 13.8 | 17.1 | 20.4 | 17 |
| # State publications (text) | 26,171 | 27,305 | 27,795 | 27,090 |
| # State publications added (text) | 547 | 1,134 | 1,061 | 914 |
| # State publications added (web) | 17,075,559 | 28,163,210 | 33,263,742 | 26,167,504 |

¹² MSL invested a significant amount of additional funding in the budget for the shared OverDrive collection so that library patrons could access reading materials even as libraries were closed; offered one-time funding to school libraries so that they could subscribe to the Montana schools shared OverDrive collection for the same reason; and, expanded e-content offerings to include a pilot for a simultaneous use magazine collection.

| | | | | |
|-------------------------------------|-----------|-----------|-----------|-----------|
| # State publications added (web) TB | 1.4 | 1.8 | 3.1 | 2 |
| # downloads for State publications | 6,592,886 | 7,075,083 | 7,728,459 | 7,132,143 |

Downloadable and streaming library ebooks and audiobooks are a valuable service in a vast and mostly rural state like Montana, where citizens often live many miles from the nearest public library. Online services like MontanaLibrary2Go provide Montanans with the convenience of an "anytime, anywhere" collection while maintaining the quality content and high level of support of traditional library services. As libraries are reforming many of their service models as a result of the pandemic, MontanaLibrary2Go will continue to evaluate opportunities to provide remote access to new and different e-content formats.

During one of our interviews the need to provide access to a robust set of licensed research oriented electronic resources to state government employees was also highlighted as another possibility of augmenting the services offered. This set of research resources could strengthen the collaboration between the state library, public libraries, and the academic libraries in the state represented by the TRAILS (Treasure State Academic Information & Library Services) consortium. Our interviews also unearthed the concern that staffing limitations and capacity are the main reason why even more of the great work done here is not feasible. The reorganization mentioned in various areas in this report has helped, yet the last two years with the pandemic have been unusual and another source of constraints.

Goal 1 Conclusion - Retrospective Question A-1

A-1. To what extent did MSL’s Five-Year Plan activities make progress towards Goal 1?

The evaluators conclude that the Montana State Library has ACHIEVED Goal 1. The level of engagement with these online resources are making the Information Access vision for this goal a great success. Even though this is a rather aspirational goal, the evaluative work on the MSC and the process of evaluating and launching the new platform for the MMP while maintaining high levels of engagement, and pivoting successfully with social media engagements, support the evaluators' judgement that this goal is achieved.

Goal 2 Retrospective Assessment - Outreach/Lifelong Learning

GOAL 2: Outreach/Lifelong Learning - The Montana library community, through its interconnectedness, helps community members understand that libraries are for their lives right now as well as for their lifetimes.

Goal 2 Description and Discussion

Following are the titles of the projects and the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on activities undertaken in support of Goal 2.

| PROJECT TITLE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL |
|------------------------------|--|
| Montana Talking Book Library | \$ 557,169.42 |
| Lifelong Learning | \$ 246,789.72 |
| GOAL SUBTOTAL | \$ 803,959.14 |

Goal Two, Outreach/Lifelong Learning, received \$803,959.14, 23.86 percent of Montana's LSTA allotment. The lion's share of this funding went to the **Montana Talking Book Library Project** (MTBL), which provides free library services to Montanans who cannot read standard print due to visual, physical, and/or reading disabilities. MTBL's mission is to improve patron quality of life and to offer easy access to reading materials for the educational, professional, and social advancement of its patrons. In offering this valuable service to these individuals, MTBL works to address the Montana Constitution's "quality of life" clause. MTBL includes the following activities: *Readers Advisory Services, Circulation, Recording Program, Training and Outreach*. MTBL has a handful of staff members with specialized training to assist this population with digital audio, braille, and large print services. In addition, MTBL benefited from approximately 90 volunteers who contributed 12,824 hours to the program during this reporting period. In FFY20, the Talking Book Library received an upgrade to the latest version of their integrated library system software, Keystone Library Automation System (KLAS) and enjoyed faster and more comprehensive tech support as well as Duplication on Demand service..

As part of this project, the *Readers Advisory Service* activity is charged with assisting MTBL patrons. Staff members answer a wide variety of queries and also provide one-on-one support to patrons who download material from the online Braille and Audio Reading Download (BARD) library service. The EBSCO NoveList Plus subscription database aids the Reader Advisors in broadening their resources and searching more efficiently to meet the needs of patrons' reading preferences. Summary statistics for this project show an impact of the pandemic in things like volunteer hours and items checked out but the number of patrons assisted remained constant, an important aspect for those people who are already homebound and have relatively limited socialization.

| Talking Books | 2018 | 2019 | 2020 | MEAN |
|-------------------------------|-------------|-------------|-------------|-------------|
| # TB patrons | 1,823 | 1,816 | 1,915 | 1,851 |
| # volunteers | 90 | 70 | 0 | 53 |
| # volunteers hours | 12,824 | 3,923 | 0 | 5,582 |
| # patrons assisted | 2,338 | 2,205 | 2,135 | 2,226 |
| Requests for assistance | 14,760 | 15,525 | 16,476 | 15,587 |
| Checkout # items | 157,588 | 130,649 | 113,631 | 133,956 |
| # ILL | 1,474 | 1,184 | 1,125 | 1,261 |
| # new digital recordings | 55 | 20 | 0 | 25 |
| Analog to digital conversions | 645 | 1 | 0 | 215 |

MTBL also has an active *Recording Program* activity. The MTBL recording program digitizes analog titles for distribution to MTBL patrons, including new recordings, rerecords, magazine issues, and books converted from analog to digital. As of 2018, 670 locally recorded Montana books had not yet been converted to digital and were only available in analog (cassette) format. The MSL Commission approved the use of MSL trust monies to convert these recordings to digital format. From April 2018 to April 2019, staff and volunteers worked to prepare shipments of master reels and print copies of books to Potomac Talking Book Services in Rockville, Maryland. A total of 59 boxes were shipped. As books were returned to MSL, the newly digital titles were added to the catalog and made available to patrons. When the project was completed in April 2019, 77 percent of the converted titles had already circulated to patrons at least once, with many going out to patrons as soon as they were received back from the conversion process. In addition to feedback from MTBL patrons who were excited to be able to listen to the converted books, staff received feedback from other state talking book departments; these states were able to receive the books through interlibrary loan or online download and can now offer their patrons access to Montana-specific titles that would otherwise be unattainable.

The **Lifelong Learning** project received \$86,745.65, 30.70 percent of the Goal Two allotment and 7.32 percent of Montana's LSTA funding. The program's librarian works collaboratively with other Montana librarians; other State Library staff; local, state and regional agencies; and other partners and organizations to provide research-based and lifelong learning-related programming, resources, digital content, training and opportunities. The State Library's success measures for this program include seeing increases in the number of Montana libraries that discover, create, and provide lifelong learning resources to their communities and in Montana citizens who demonstrate meaningful improvements to their quality of life because of the lifelong learning opportunities made available by their libraries. This program includes the following activities: Lifelong Learning Training, Ready 2 Read Texting Program, Ready 2 Read Rendezvous, Collaborative Summer Library Program, Economic Development in Libraries, and Mind in the Making Training. In FY19, the program helped libraries implement a successful summer reading program despite the obstacles presented by the COVID-19 pandemic. Even prior to the pandemic, there were several libraries who had expressed interest in an online summer reading tracker, and the onset of the pandemic made this a top priority for the Lifelong Learning Librarian. The tracking software READSquared helped provide the necessary structure for a successful reading program when the state's physical buildings were closed. One library mentioned that they had 25 percent fewer summer reading participants than in a typical year, yet received 30 percent more completed reading logs. MSL support also included webinars and training sessions to help libraries brainstorm activity ideas, review reading kits/materials, and share information on performers and programs.

In FY20, Bat Week showed that school teachers and school librarians were a critical pool of program users, as they had a lot of reach with young Montanans. While MSL lacks the resources to specifically plan for school programming, it hopes to more explicitly recruit schools into its Lifelong Learning programs.

| Lifelong Learning | 2018 | 2019 | 2020 | MEAN |
|--|-------------|-------------|-------------|-------------|
| # Summer Reading Program events | 305 | 609 | 583 | 499 |
| # of libraries participating in Bat Week | 33 | 47 | N/A | 40 |
| # of Webinars | 9 | 18 | 29 | 19 |
| # of librarians in webinars | 122 | 314 | 633 | 356 |

The *Montana Ready 2 Read Texting Program* activity delivered three weekly research-based text messages at no charge to anyone who signed up for the program. The widespread use, low cost, and ease of scalability of text messaging made texting an attractive approach to supporting parenting practices in Montana. The State Library disseminated texts via ShoutBomb. Participants received three text messages each week. On Mondays, they received “FACT” texts, designed to generate buy-in by highlighting the importance of a particular skill. On Wednesdays, they received “TIP” texts, designed to maximize parents’ self-efficacy in supporting their children’s literacy development by minimizing the costs associated with adopting beneficial practices. These texts include short, simple, and highly specific activities for parents to do with their children. On Fridays, parents received “GROWTH” texts, which provided encouragement and reinforcement of the tips sent on Wednesdays. In FY18, an additional 77 people signed up for the program during this reporting period, bringing the total to 814 subscribers. In FY19, an average of 898 people were subscribed to the program each month. In FY20, an average of 928 people were subscribed to the program each month.

This program also included two other Ready 2 Read activities. FY18’s *Ready 2 Read Rendezvous* was a three-day opportunity for librarians across Montana to receive additional training in serving families with young children in their communities. The Rendezvous featured experts on storytelling and early literacy programming, as well as instruction on how to be culturally respectful when choosing stories to share with children. Training topics included “1,000 Stories: The Power of Storytelling in Early Childhood,” “Indigenizing Education: Indian Education for All in Montana Libraries,” and “Using the MGOL Method to Plan and Present High-Quality Early Literacy Programs.” Interested library staff were required to apply to attend the fully funded training by identifying why they wanted to attend, what outcomes they intended to achieve, and how they would evaluate the impacts of their final projects. These final projects were expected to use what had been learned to address a child/family–focused need in their communities. Projects were expected to be purposeful, impactful, and measurable. State Library staff held follow-up meetings to help keep attendees on track with implementing their projects. The *Ready 2 Read Goes Wild Trunks* activity was a FY20 partnership between MSL, Fish, Wildlife, and Parks, and public libraries to bring early literacy and outdoor education/awareness to Montana’s youngest citizens. The program Trunks currently offers bear- and bat-themed trunks for libraries to use with their patrons, and draws upon the “Growing Up Wild” (outdoor education and activities for kids aged 3 – 7) and “Project Wild” (outdoor education and activities for kids 8+) curricula. Trunks contained items like bear pelts and bat skeletons, plastic tokens, bear tracks, skull replicas, posters and bookmarks, “Growing Up Wild” and “Project Wild” activity guides, and other small craft items like plastic cups, wooden dice, and pencils.

The *Economic Development in Libraries* also fell under the category of Lifelong Learning, In FY19, the Lifelong Learning librarian initiated a project to help libraries become resources for economic development in their communities. MSL contracted with an economic development consultant to lay the groundwork for future programs such as the Montana libraries SPARK ED initiative and entrepreneurial coaching. One webinar was held, "The Building Block of Economic Development." The project continued to grow during FY20. Learning cohorts for Entrepreneurial Coaching and Entrepreneurial Support in Libraries were formed, and webinars focusing on entrepreneurial resources such as the Small Business Administration program were conducted.

Goal 2 Conclusion - Retrospective Question A-1

A-1. To what extent did MSL’s Five-Year Plan activities make progress towards Goal 2?

The evaluators conclude that the Montana State Library has PARTIALLY ACHIEVED Goal 2. Much progress was made towards this goal through continuing education and training activities, new and innovative ways of outreach especially during the pandemic (the Meme and Writing Contest definitely noteworthy), and through partnerships with other state agencies and state businesses. This goal is a rather aspirational goal the way it was framed in the plan “looking at libraries holistically and how they serve the patrons at different points in their lives.” Though much of the programming tried to do that, the primary focus has been on public libraries rather than all types of libraries and there is room for improvement in reaching the ideal of understanding user needs more holistically.

Goal 3 Retrospective Assessment - Community Leadership

GOAL 3: Community Leadership - Librarians, advisory members, and board members listen to their community members to design library services that make a difference in the community while continuing to bridge digital/traditional library services.

Goal 3 Description and Discussion

There was only one project undertaken in FFY 2018 – FFY 2020 under Goal 3, Continuing Education..

| PROJECT TITLE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL |
|----------------------|--|
| Continuing Education | \$ 298,139.86 |
| GOAL SUBTOTAL | \$ 298,139.86 |

Goal Three’s only program, **Continuing Education**, received \$289,139.86 in funding, 8.85 percent of Montana’s total LSTA allotment. In this program, the State Library augments programming provided through the Montana Library Association; the two organizations provide balanced and essential ongoing professional development through in-person and virtual events, allowing Montana library staff to effectively serve their communities. Under this project, the

following activities took place: *Trustee Training, Online Learning Cohorts, ASPeN Continuing Education Development, MSL Workshops and Collaborations, Summer Library Leadership Institute, Strategic Plan Pathway Pilot, Strategic Track for Montana State Library Certification, and Fall Workshops.*

The Certification Program (CP) is mandatory for public library directors and voluntary for library staff and public library trustees. The CP serves an important function in Montana, where there is no higher education degree program for public libraries and the available workforce for the small public libraries in the state is often untrained in library science. The CP program and the Public Library Standards ensure that library boards will support continuing education by providing funding and time for training - 56 library staff and trustees earned certification in 2018, 68 in 2019 and 77 in 2020.

| Continuing Education | 2018 | 2019 | 2020 | MEAN |
|-----------------------------|-------------|-------------|-------------|-------------|
| # earning certification | 56 | 68 | 77 | 67 |
| # trustee training | 30 | | 85 | |
| # Webjunction users | 161 | 229 | 191 | 194 |

Trustee Training consists of the annual workshop provided to library trustees. In FY18, the workshop, which took place in Butte, focused on strategic planning for libraries. This topic was requested by public library board members. Over 85 percent of the 30 attendees were trustees. Library Strategies led the all-day training, giving board members insight on how to collect and use community feedback to design responsive but realistic plans for their libraries. Over 80 percent of the respondents thought the training was interesting and/or it expanded their knowledge or skills. In FY19, the trustee workshop focused on effective board leadership. The presenter covered the purpose and legal duties of the library board. Approximately 82 percent of the attendees were trustees. All respondents to the survey agreed or strongly agreed that they learned something from this event and indicated they were likely to apply what they learned. MSL originally planned to offer two versions of this workshop - one in the western part of the state and one in the eastern part of the state; this was impossible due to the global pandemic. MSL then used the remaining funds to purchase online learning tools specifically designed for board members, and led small cohorts of board members through custom-designed series focused on building support for the library, best practices for boards, and policy development.

In FY20, the trustee training workshops were held virtually and focused on building support for the library (funded through State General Fund) and effective boards. The 4 online cohorts and 1 virtual pre-conference training hosted 85 attendees. The effective board training had 11 trustees who attended weekly sessions for 5 weeks. The training covered basic roles and duties, working with the library director, conflict resolution/communication, and EDI. Comments from attendees were positive, and some of the trustees from this cohort went on to join the trustee interest group for the Montana Library Association. One attendee later testified at the Montana State Legislature, asking for support for mobile hotspots.

One interesting turn of events from the global pandemic has been an increase in requests for MSL staff–led online learning for board members. MSL has offered individual board training (5-member board with a director and/or one other staff member present) on the following topics: the future of libraries, economic recessions and libraries, the mill levy process, and general board training. Many of these sessions support MSL’s efforts to achieve goal 5 of our LSTA 5-year plan to increase support for the library. Anecdotal feedback has indicated a positive reception to these offerings, with follow-up questions about the mill levy training indicating that the libraries involved are pursuing a potential mill levy election to increase funding for the library.

Goal 3 Conclusion - Retrospective Question A-1

A-1. To what extent did MSL’s Five-Year Plan activities make progress towards Goal 3?

The evaluators conclude that the Montana State Library has PARTIALLY ACHIEVED Goal 3. The activities supported progress for this goal but much work still needs to take place here. Among the successes include continuing education partnership with Humanities Montana on a civic engagement that includes all types of libraries.¹³ Much of this work has started though still in progress, therefore we noted this goal as partially achieved. The staff time and resource constraints were also noted here, especially the need for formal user experience studies and implementation to make the various wonderful dashboards MSU has created more user friendly and easily navigable.

Goal 4 Retrospective Assessment - Internet Access

GOAL 4: Internet Access - Every Montanan has access to the Internet.

Goal 4 Description and Discussion

There were no projects implemented in support of Goal 4. Even though there were no projects listed under LSTA funding for this goal, the MSL sponsored a study that provides a detailed picture on the network connectivity in Montana. Additional funding and activities outside LSTA also took place in this area. Also, related activity under Goal 5 in the SPR contributed to the partial success of this goal (the e-rate consultant assisted a private vendor with completing the Toward Gigabit Libraries Internet 2.0 Toolkit for every public library and branch in Montana in FY19). The State Library hired contractors to complete site assessments, recommend equipment, work with a cabling contractor, and install equipment. Each library site is unique, so their equipment and cabling needs will vary. The main goal of this project is to improve Internet access for the public by increasing Internet speeds at the library and improving Wi-Fi/wired network reliability.

Goal 4 Conclusion - Retrospective Question A-1

A-1. To what extent did MSL’s Five-Year Plan activities make progress towards Goal 4?

¹³ <https://www.humanitiesmontana.org/democracy-project-for-library-staff/>

The evaluators conclude that the Montana State Library HAS PARTIALLY ACHIEVED Goal 4. As to whether the goal of having the internet in every corner in Montana is within reach, the geography of the state still makes this an aspirational goal as of the date this evaluation is completed. Improving Internet connectivity is not really a project (with a start, middle, and end) but an ongoing process that needs to adapt and scale over time. The activities also require willing and able participants; for various reasons, improvements for all are unlikely to occur at the same time. That said, the MSL is encouraged to retain this goal and continue to mark inroads (as it has in the past several years) and continue marking the significant impacts it has achieved both inside Montana and as inspiration for the rest of the country.

Goal 5 Retrospective Assessment - Adequate Support

GOAL 5: Adequate Support - Library community has adequate and stable support to provide the best library service possible.

Goal 5 Description and Discussion

Following are the titles of the projects and the total amount of LSTA FFY 2018 – FFY 2020 funding that was expended on activities undertaken in support of Goal 5.

| PROJECT TITLE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL |
|----------------------|--|
| Consulting Services | \$ 802,607.65 |
| GOAL SUBTOTAL | \$ 802,607.65 |

Consulting Services, the only Goal Five project to receive LSTA funds, was given \$802,607.65, 23.82 percent of the state’s allotment. The Montana State Library offers consulting services and training opportunities to public librarians and trustees in order to help them respond to the needs of their local communities, improve the leadership skills of directors and board members, improve the library’s financial situation, grow local government relationships, collaborate with colleagues statewide, and provide relevant library services in a rapidly changing, information-rich world. The three Statewide Consulting Librarians help libraries at their point of need and are prepared to answer a variety of questions both virtually and in-person. During FY18, Statewide Consulting Librarians traveled over 25,000 miles to conduct site visits throughout the state; they traveled over 22,000 in FY19 and over 4,410 miles in FY20. One librarian retired and the former Director of Library Development decided to step down to become the Lead Statewide Consulting Librarian. The library’s structure was flattened as a result, and these librarians are now part of the library’s User Services group.

| Consulting Services | 2018 | 2019 | 2020 | MEAN |
|----------------------------|-------------|-------------|-------------|-------------|
| # questions answered | 539 | 641 | 720 | 633 |
| # lib boards | 28 | 92 | 56 | 59 |
| # eRate fund requests | 17 | 16 | 18 | 17 |

This project includes the following activities: *Support for Libraries, Public Library Statistics Preparation and Outcomes Communication, Community-Led Planning, E-Rate Consultation and Internet Speed Improvement, Mobile Hotspots/ Mobile Device Service for Libraries, Governance Models*. The *Support for Libraries* activity was vital for librarians across the state. In FY18, Statewide Consulting Librarians provide virtual consultations, site visits, and answer questions from library directors, board members, and other staff via email, phone, and in-person. Approximately 30 percent of the consulting questions were about finance, 30 percent were about local Montana library issues, and the remaining 40 percent covered law, library operations, personnel, planning, and policies and procedures. COVID-19 impacted the types of consulting questions that were received. Most of the library operations questions were about when to close, when to open, how to safely open the library, and other issues related to providing library services during a global pandemic. One interesting change that happened was an increase in the number of technology questions. This was directly related to the State Library's use of remaining year-end funds and a \$500,000 grant to deploy mobile hotspots and mobile devices to public libraries. Statewide Consulting Librarians saw their work with board members go up as they hosted online meetings for those boards that needed to meet during the pandemic.

In the *Public Library Statistics, Preparation and Outcomes Communication* activity, the Statewide Consulting Librarians continued to provide support for the collection of public library statistics. The coordinator created a new interactive dashboard to report public library statistics dating back to 2007. This dashboard allows libraries and their boards to review their statistics, compare themselves to other libraries, and analyze any deficiencies that need to be addressed.

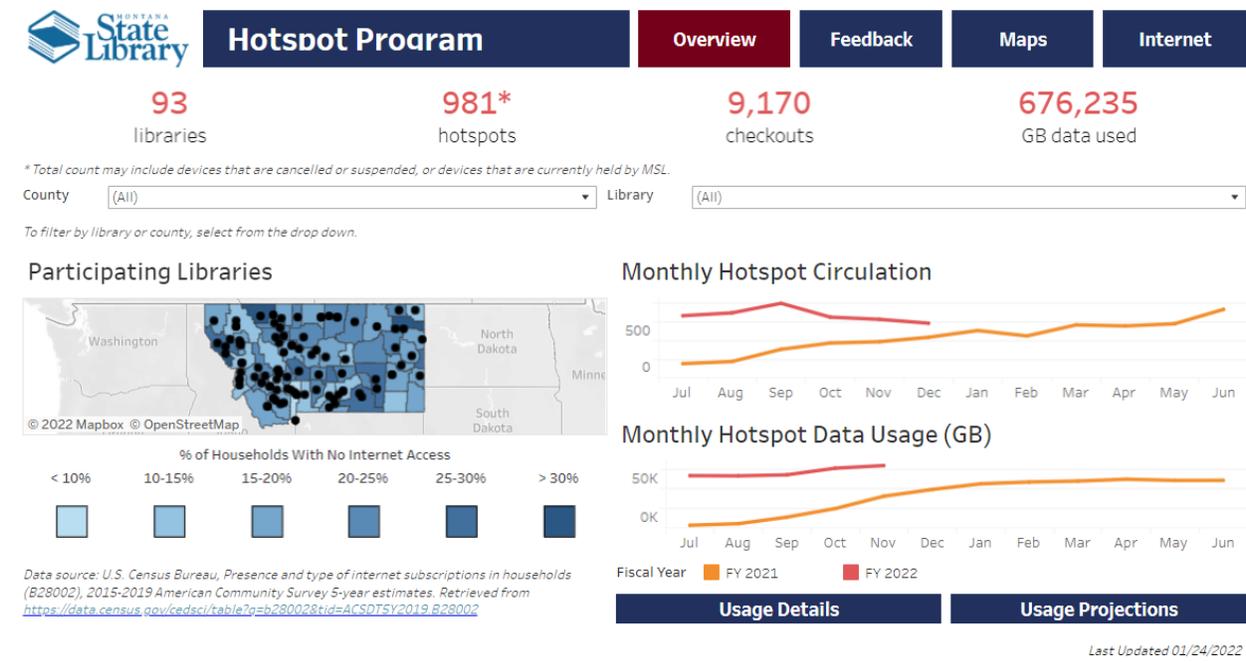
Community engagement training gives directors and boards knowledge and confidence to explore new partnerships with other agencies and community organizations. The *Community-Led Planning* activity saw Statewide Consulting Librarians set a goal to provide guidance and advice on becoming community leaders to local libraries and to facilitate community-led strategic planning and/or listening sessions. The work on strategic planning processes has led to securing an IMLS leadership grant that aims at helping small and rural libraries in this area.¹⁴ This work closely aligns with a resolution adopted by the Montana State Library Commission that states all Montanans have the right to library services sufficient unto their needs. MSL began the process of implementing the requirements of the grant and addressing both barriers to usage of libraries and barriers to strategic planning.

E-Rate is featured in the *E-Rate Consultation and Internet Speed Improvement* activity. E-Rate is a federal discount program for telecommunications and Internet services for schools and libraries. It provides discounts of up to 90 percent on eligible services and equipment, thus allowing libraries and communities to stretch their dollars and get more for less. In FY18, one library consultant was tasked with assisting Montana public libraries with E-Rate by keeping library applicants apprised of deadlines and requirements, reviewing applications, serving as a liaison between USAC (Universal Service Administrative Company) and Montana library applicants, answering questions about the program, and providing training and one-on-one

¹⁴ "Framing the Future: Advancing Strategic Planning for Small and Rural Libraries."

assistance as needed. This consultant helped a couple dozen libraries per year file e-rate applications.

In FY19, one of the Statewide Consulting Librarians followed the trend of providing mobile hotspots for circulation, thus creating the *Mobile Hotspots/Mobile Device Service for Libraries* activity. When COVID-19 forced many libraries to close, MSL learned how Montanans who lacked Internet access could not do schoolwork or file online forms. MSL used funds that were available due to cancellation of face-to-face events to implement a mobile hotspot program. The Statewide Consulting Librarians helped deploy the hotspots, design policy templates, and answered questions from the librarians. MSL had an opportunity to apply for federal funds through the CARES Act; they received a \$500,000 grant to purchase mobile hotspots and mobile devices. Devices were added based on feedback from the librarians. Approximately 81 libraries are participating (public, academic, and tribal college libraries), and 76 percent of the counties in Montana have a library participating in this program. Overall circulation and data usage grew each month. In FY20, 89 libraries participated in the program. The 959 hotspots distributed across the state circulated 7,278 times and more than 550,000 GB of data were used. Overall circulation and data usage for this program has continued to increase. The most telling and impactful story of these hotspots comes in the form of a priest being able to offer a funeral service using one of these hotspots to a family who lost their loved one and bring closure to their anguish during the COVID-19 time of loss and sorrow that affected so many people (Appendix J). The following dashboard captures the continuing success of the hotspot program.



Goal 5 Conclusion - Retrospective Question A-1

A-1. To what extent did MSL’s Five-Year Plan activities make progress towards Goal 5?

The evaluators conclude that the Montana State Library has ACHIEVED Goal 5. Between the consultant efforts, the successful pivoting, the leveraging of LSTA funds with other funding sources, and the impactful stories on the ground, we conclude that this goal is achieved.

Retrospective Assessment Questions A-2 and A-3

Retrospective Question A-2

A-2. To what extent did MSL’s Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?

MLS’s Five-Year Plan focuses heavily on Information Access and Institutional Capacity (Appendix F) as the top two focal areas, and to a lesser degree on Human Resources. Appendix F provides a detailed mapping to LSTA focal areas and intents on a project by project basis. The results achieved are in line with the national priorities associated with the Measuring Success framework and their corresponding intents.

Three projects undertaken in support of Goal 1 address the focal area of Information Access (Information Access [the project], MMP, and Downloadable E-Content). One project undertaken in support of Goal 2 addresses the focal area of Information Access (Montana Talking Book Library). Two projects undertaken in support of Goals 3 and 5 (Continuing Education and Consulting Services address the focal area of Institutional Capacity. One project undertaken in support of Goal 2 (Lifelong Learning) addresses the focal area of Human Resources.

Retrospective Question A-3

A-3. Did any of the following groups represent a substantial focus for MSL’s Five-Year Plan activities? (Yes/No)

Only two projects reached the 10 percent expenditure threshold identified by IMLS as representing a substantial focus on a specific identified group. **Information Access** accounted for 21.87 percent of total expenditures during the evaluation period, representing *library workforce*. **Montana Talking Book Library** accounted for 16.53 percent of total expenditures during the evaluation period, representing *individuals with disabilities, children, school-aged youth, and seniors*. However, this does not mean that many of the target audiences did not significantly benefit from the efforts supported with LSTA funding. Expenditures under Goal 2’s **Lifelong Learning** project directly benefited *Families and Children*. Furthermore, the evaluators were able to identify secondary effects from training and consultations during the period covered by this assessment that indirectly benefited other audiences identified by IMLS.

| GROUP | YES/NO |
|-------|--------|
|-------|--------|

| | |
|--|-----|
| Library workforce (current and future) | YES |
| Individuals living below the poverty line | NO |
| Individuals that are unemployed/underemployed | NO |
| Ethnic or minority populations | NO |
| Immigrants/refugees | NO |
| Individuals with disabilities | YES |
| Individuals with limited functional literacy or information skills | NO |
| Families | NO |
| Children (aged 0-5) | YES |
| School-aged youth (aged 6-17) | YES |

Process Questions B-1, B-2, and B-3

Process Question B-1

B-1. How has MSL used any data from the State Program Report (SPR) and elsewhere (e.g., Public Libraries Survey) to guide activities included in the Five-Year Plan?

The SPR allows MSL to take a step back and look at the broader picture of how LSTA funds have been used, and more importantly, where there are "thin" areas in achieving the Strategic plan. MSL has dedicated resources to enhance the holistic framework of user needs during the lifespan of a person to be able to set realistic and meaningful targets, measures, and outcomes as we are closing this LSTA planning cycle FFY218-FFY2022 and initiating the planning phase for the FFY2023-2027..

Process Question B-2

B-2. Specify any modifications MSL made to the Five-Year Plan. What was the reason for this change?

No modifications have been made.

Process Question B-3

B-3. How and with whom has MSL shared data from the SPR and from other evaluation resources? How has MSL used the last Five-Year Evaluation to inform data collected for the new Five-Year Evaluation? How has MSL used this information throughout this five-year cycle?

Data from the SPR has been shared with the State Library Commission, the Network Advisory Council, Montana's congressional delegation, and the Montana State Legislature. Data was shared in infographics and on a dashboard. Data from the last five-year

evaluation were used to create the current 5 year plan; the plan guides MSL's LSTA activities. MSL created more sophisticated data collection as a result of both the last five-year evaluation and staff training at the Research Institute for Public Libraries (RIPL). Wanting to be better able to answer questions from the evaluator – regarding success of the LSTA funded work, current data collection includes the use of visual dashboards to help analyze data to communicate what MSL has accomplished, usage, and value of the programs.

SPR data was used by MMP to evaluate progress and identify activities for next year such as keeping track of counties that have content, and identifying subject areas for consultants to determine new resources or training that needs to be offered. The MSL keeps track of progress on the LSTA goals through a [publicly available dashboard](#).

Methodology Questions C-1, C-2, C-3, and C-4

Methodology Question C-1

C-1. Identify how MSL implemented an independent Five-Year Evaluation using the criteria described in the section of this guidance document called Selection of an Independent Evaluator.

As a result of a competitive bidding process, QualityMetrics LLC, a library consulting firm headquartered in Silver Spring Maryland, was awarded the contract to conduct the independent LSTA evaluation. QualityMetrics LLC does not have a role in carrying out other LSTA-funded activities and is independent of those who are being evaluated or who might be favorably or adversely affected by the evaluation results.

QualityMetrics LLC has in-depth evaluation experience and demonstrated professional competency in conducting LSTA Grants to States evaluations. We proactively study and review the FFY2018 and FFY2019 projects and activities through the publicly available SPR interface when responding to an competitive RFP. QualityMetrics Director and Chief Executive Officer Dr. Martha Kyrillidou, carried out more than 20 such evaluations for the 2013-2017 cycle; she was also familiar with Montana through a strategic planning engagement with Montana State University in earlier years. In addition, QualityMetrics associate consultant, Bill Wilson, has been part of more than 50 LSTA evaluations and participated in each five-year cycle since 2002 both as a partner in Himmel & Wilson, Library Consultants and as a research consultant with QualityMetrics. Our third collaborator, Carson Block has experience with libraries in Montana to improve their technology infrastructure and connectivity and served as our specialist consultant on the network and internet connectivity projects.

Methodology Question C-2

C-2. Describe the types of statistical and qualitative methods (including administrative records) used in conducting the Five-Year Evaluation. Assess their validity and reliability.

QualityMetrics, LLC, deployed a multi-faceted and rigorous mixed methods protocol for data collection. Thorough reviews of demographic data, quantitative PLS data, and SPR data formed the basis of our knowledge from the RFP response onward. Our initial interaction created a space for the MSL to deposit additional data and files and reflect on the program. After a series of Zoom calls (first with MSL representatives at the beginning of the evaluation process and secondly, later in the process, to discuss whether goals had been achieved, partially achieved, or not achieved), we stayed in touch with the agency to resolve questions that emerged from the data collection and to solicit additional information. Data gathering included: (a) interviews with agency staff members; (b) interviews with project managers of various SPR-reported projects and activities; (c) reviewing library websites; and, (d) responses to three surveys, a broad-based short survey for library staff and stakeholders.

COVID-19 presented special circumstances, and a number of considerations had to be taken into account to complete our research. The pandemic, due to its travel restrictions and social distancing limitations, necessitated many changes in how evaluation work is done and how we engage policymakers, program managers.¹⁵ We replaced face-to-face interviews with remote interviews and desk-based methods, paying attention to (a) maximizing use of technology; (b) focusing on the most marginalised populations (small and rural libraries websites and google maps, and, in particular, users of talking books services); and (c) enhancing triangulation to validate remote data.¹⁶ The Five-Year Evaluation is a summative assessment, and as such, the availability of the SPR data was of critical importance.

While we planned an onsite visit in September, the plans were disrupted due to another rise in COVID-19 cases. While no on-site visit to the State Library was conducted during this evaluation period, investigators Martha Kyrillidou and Carson Block of QualityMetrics are familiar and have experience consulting in Montana before.

Furthermore, the restrictions imposed by COVID-19 have strengthened the state library agency role. During this time of crisis, the state library was the source of answers for its communities and the profession as a whole. The SLAA responded to this need by pivoting the way it does business. Librarians and board members have become more comfortable with virtual/online support and education as a result of the pandemic. In some ways, as the state librarian noted “the shifts created by COVID-19 have led to [MSL’s] more impactful work by challenging our staff to invest in online resources and meetings that have connected us with new clients and allowed us to provide different services for Montanans.”

¹⁵ OECD/DAC and IEO/UNDP (2020) [Guidance Note: Good practices during COVID-19](#); UNICEF Evaluation Office (2020) [Technical Note: Response of the UNICEF Evaluation Function to the COVID-19 Crisis](#); WFP Office of Evaluation (2020) [Technical Note for {Planning and Conducting Evaluations During COVID-19}](#); UNFPA Evaluation Office (2020) [Adapting evaluations to the COVID-19 pandemic](#); UNDP Independent Evaluation Office (2020) [Event planning and implementation during COVID-19](#); ILO Evaluation Office (2020) [Implications of COVID-19 on evaluations in the ILO](#); FAO Office of Evaluations (2020) [Risk analysis and guidance for the management and conduct of evaluations during international and national level COVID-19 crisis and restrictions](#).

¹⁶ UNFPA Evaluation Office (2020) [Adapting evaluations to the COVID-19 pandemic](#).

A Web-based survey targeting the library community was conducted between November 2, 2021 to December 3, 2021. This survey provided considerable qualitative information, as well as some additional quantitative information. Additional corroborative evidence from comments collected in the survey served to triangulate the previously gathered evidence.

Also, two online surveys were conducted with great success in attracting hundreds of respondents. The Shared Catalog survey was open between October 29, 2021 to December 13, 2021; and, the online survey for the Montana Memory Project was open between October 16, 2021 to December 16, 2022.

Validity and reliability analysis traditionally reflect a positivist worldview, and in a qualitative naturalistic approach, they are being redefined by some divergent views on whether and how one ensures quality and rigor in qualitative inquiry. The notion that naturalistic inquiry needs to exhibit quality, rigor, and trustworthiness has gained more traction nowadays. The quality and rigor of the phone interviews conducted by the evaluators in the LSTA evaluation of MSL has been enhanced by references to external Web site links, Google Maps, and internal triangulation. In some instances, interviewees have been asked to allow recording of the conversation (with assurances of confidentiality by the evaluators). At other times, two evaluators have attended focus groups or interviews. Shared note-taking was available in real time through shared access to Google Documents and Google Drive. This approach has allowed evaluators to refine their inquiry and tailor it as knowledge of MSL was refined from one interaction to the next. Recorded conversations also allowed the evaluators to reflect upon and modify their interpretations in a reliable manner. The validity of the inquiry was strengthened with the informed selection of the subjects by MSL's leadership team and staff.

Methodology Question C-3

C-3. Describe the stakeholders involved in the various stages of the Five-Year Evaluation. How did QualityMetrics in cooperation with MSL engage them?

Multiple and regular engagement with a team of agency staff members was taking place every month. The focus groups and interviews provided both qualitative evidence and context that supplemented a review of agency-supplied statistical data and information and data submitted in the form of the State Program Reports (SPRs). Interviewees shared their knowledge of LSTA utilization, enhancing interactions and depth and quality of the conversations. Furthermore, principal investigators Martha Kyrillidou, Bill Wilson, and Carson Block conducted both separate and joint interviews and group sessions and shared and discussed their observations in order to develop a shared understanding of the meaning of the library experience in Montana and how it was supported by MSL with LSTA support. This approach allowed for the concept of triangulation to be implemented as evaluators debriefed and compared interpretations and understandings.

Methodology Question C-4

C-4. Discuss how MSL will share the key findings and recommendations with others.

MSL will share key findings and recommendations with the State Library Commission and Network Advisory Council through their normal meetings. Also, MSL will share the key findings and recommendations with Montana library directors, staff, and board members through Website Chats with the State Librarian and reports during regional library meetings held every fall and spring.

Conclusion

This evaluation would be remiss if it did not acknowledge the increased funding that the state agencies have received through the Coronavirus Aid, Relief and Economic Security Act (CARES) and the American Recovery Plan Act (ARPA). MSL, like every other state agency, has been successful in disbursing these one time additional sources of funding. Often with the same level of staff they had before, they successfully dispersed twice the amount of the LSTA funding as the annual funding stream was augmented with this one time infusion of support. A big thank to all parties involved for helping our communities and libraries thrive during the unprecedented times of COVID-19.

Per guidance provided by IMLS, we have not examined the impact of these additional funds though occasionally we mentioned some of these instances in the report to recognize that some of the ways projects expanded (see the hotspot program for example) was heavily influenced by the existence of additional funding sources. The main reason we limited our financial and primary analysis to LSTA annual allocations and expenditures is to allow for the ability to have continuity of comparability in the five year evaluations as the long term standing funding formula of LSTA is the traditional population based formula. Yet, we want to acknowledge the existence of the additional funds and the many additional projects and activities they supported in the hopes that a look at these activities will indeed provide a fuller and more accurate picture of what happened during the FFY 2018 - FFY 2022 LSTA Evaluation period. In the words of the agency staff:

We stopped traveling and offering f2f services during the pandemic. We shifted to an online model – supporting libraries through Zoom meetings, virtual workshops, and phone calls. Funding that was freed up from f2f training was used to purchase online access to high quality training materials for libraries and to initiate some pilot digital projects such as ReadSquared and a hotspot program that has been very successful. We'll probably see more f2f work in the future but not as much as in previous years. We've learned that many things can be done virtually - such as attending a library board meeting or certain online training sessions. However, we still see value in f2f for highly interactive deeper learning experiences and for challenging consulting situations where the ability to read body language is critical for navigating the issues the library is facing.

Libraries are exploring many new ways and opportunities and some things will forever change as a result of the pandemic.

APPENDICES

Appendix A: Acronyms

ARM - Administrative Rules of Montana
ARPA - American Recovery Plan Act
BARD - Braille and Audio Reading Download
BSCDN - Big Sky Country Digital Network
CARES - Coronavirus Aid, Relief and Economic Security Act
CE - Program - Continuing Education Program
CE - Certification Program
CMC - Content Management Committee
COP - Community of Practice
CSLP - Collaborative Summer Library Program
DPLA - Digital Public Library of America
EISi - Elementary/Secondary Information System
ELSA - Excellent Library Standards Award
FFY - Federal Fiscal Year
FTE - Full Time Equivalent
IMLS - Institute of Museum and Library Services
KLAS - Keystone Library Automated System
LSTA - Library Services and Technology Act
NCES - National Center for Educational Statistics
MGOL - Mother Goose on the Loose
MMP - Montana Memory Project
MSC - Montana Shared Catalog
MSL - Montana State Library
MTBL or TBL - Montana Talking Book Library
ML2G or MLTG or MTLIB2GO - Montana Library 2 Go
NAC - Network Advisory Council
OCLC - Online Computer Library Center
OPAC - online public access catalog
POP - Patron Outreach Project
R2R - Ready 2 Read
SWCAP - Statewide Cost Allocation Plan
SLLI - Summer Library Leadership Institute
SLR - Statewide Library Resources
SPR - State Program Report
STEAM - Science, Technology, Engineering, Art, and Math
STEM - Science, Technology, Engineering, and Math
TPZ - Technology Petting Zoo (tablets and e-readers for library staff to try new technology)
TRAILS - Treasure State Academic Information & Library Services consortium.
USAC - Universal Service Administrative Company
WIC - Women, Infants and Children

Appendix B: Interviewees/ Focus Groups

| Interview | Stakeholder | Title | Date |
|-----------|------------------|------------------|-------------------------|
| #1 | Tracy Cook | SLAA staff | 7/12/2021 |
| #2 | Amelia Kim | SLAA staff | 7/12/2021 |
| #3 | Cara Orban | SLAA staff | 7/13/2021 |
| #4 | Jennifer Birnel | SLAA staff | 7/13/2021 |
| #5 | Jessica Edwards | SLAA staff | 7/13/2021 |
| #6 | Marilyn Bennett | SLAA staff | 7/13/2021 |
| #7 | Joann Flick | SLAA staff | 7/13/2021 |
| #8 | Jennie Stapp | State Librarian | 9/7/2021 |
| #9 | Bruce Newell | MSL Board Member | 11/4/2021 |
| #10 | Kenning Arlitsch | MSL Board Member | 1/21/2022 |
| #11 | Suzanne Reymer | SLAA staff | 7/28/2021 & 1/3/2022 |

| Focus Group | Stakeholders | Number of Proposed Participants | Date |
|-------------|---|---------------------------------|------------|
| #1 | Library Development / Consultants | 3 | 4/15/2021 |
| #2 | Network Advisory Council | 6 | 9/26/2021 |
| #3 | MSL Commission | 6 | 10/12/2021 |
| #4 | Library Development /Consultants | 4 | 10/29/2021 |
| #5 | Survey Design Group (librarians/directors) | 8 | virtual |

**Monthly meetings with a group of 4-6 staff agency staff on progress updates.*

Appendix C: Bibliography of Documents Reviewed

State Agency Sources

- SPR data (FFY 2018-2020)
- Agency website and dashboards
- Public Library Surveys
- IMLS Program Officer Site Visit 2018 materials
- Final MSL Personal Report
- MSL Organizational Chart
- Montana Summer Reading 2020
- 2019 Ready 2 Read Rendezvous
- Early Literacy in Montana: Ready 2 Read
- Office of Research and Policy Analysis, Montana Legislative Services Division, Other States' Legislation Related to Broadband, Economic Affairs Interim Committee, Pat Murdo, Research Staff
- Press release, Governor Gianforte Signs Landmark Investment in Broadband Expansion, Governor's Office, May 11, 2021
- Rhinesmith, Colin, Jo Dutilloy, and Susan Kennedy. The State of Broadband Connectivity and Related IT Infrastructure in Montana's Public Libraries. Simmons University, March 2020.
 - Also Gigabit toolkit report, excel file

Federal Government Publications

Federal Agency Data Sources

- Institute of Museum and Library Services, [State Program Report \(SPR\) report](#)
- Institute of Museum and Library Services, [Public Library Statistics](#)
- Institute of Museum and Library Services, [State Profiles](#)
- Institute of Museum and Library Services ["Grants to States" Conference](#)
- Institute of Museum and Library Services, [State Library Administrative Agency Survey](#)
- National Center for Education Statistics, [Academic Libraries](#)
- National Center for Education Statistics, [Elementary and Secondary Information System](#)
- United States Census Bureau, [Decennial Census](#) (April 1, 2020)

Evaluation Resources and COVID-19

- OECD/DAC and IEO/UNDP (2020) [Guidance Note: Good practices during COVID-19.](#)
- UNICEF Evaluation Office (2020) [Technical Note: Response of the UNICEF Evaluation Function to the COVID-19 Crisis.](#)
- WFP Office of Evaluation (2020) [Technical Note for Planning and Conducting Evaluations During COVID-19.](#)

- UNFPA Evaluation Office (2020) [Adapting evaluations to the COVID-19 pandemic.](#)
- UNDP Independent Evaluation Office (2020) [Event planning and implementation during COVID-19.](#)
- ILO Evaluation Office (2020) [Implications of COVID-19 on evaluations in the ILO.](#)
- FAO Office of Evaluations (2020) [Risk analysis and guidance for the management and conduct of evaluations during international and national level COVID-19 crisis and restrictions.](#)

Other Resources

- Ethel Himmel and William J. Wilson. The Functions and Roles of State Library Agencies. American Library Association, Chicago, 2000.
- The Institute of Museum and Library Services. 2021. [Functions and Roles of State Libraries: 2000 and 2020.](#) Washington, DC: Institute of Museum and Library Services.
- The Institute of Museum and Library Services. (2021). [The Use and Cost of Public Library Materials: Trends Before the COVID-19 Pandemic.](#) Washington, DC: The Institute.
- The Institute of Museum and Library Services. 2021. [Understanding the Social Wellbeing Impacts of the Nation's Libraries and Museums.](#) 2021 Report. Washington DC: Institute of Museum and Library Services.
- The Institute of Museum and Library Services. 2021. [Functions and Roles of State Libraries: 2000 and 2020.](#) Washington, DC: Institute of Museum and Library Services.
- Measures that Matter: [Workforce Development Literature Review](#), January 12, 2021.
- Pelczar, M., Frehill, L. M., Nielsen, E, Kaiser, A., Hudson, J., & Wan, T. (2021). [Characteristics of Public Libraries in the United States: Results from the FY 2019 Public Libraries Survey.](#) Institute of Museum and Library Services: Washington, D.C. Results from the SDC E-Resources Survey (received January 2022).
- Sarah Mervosh, "[The pandemic hurt these students the most.](#)" In print "Pandemic widened U.S. Educational Gap into a Gulf, Research Suggests." *New York Times*, July 28, 2021, Section A, Page 13.
- The School Librarian Investigation: Decline or Evolution? <https://libslide.org/>

Appendix D: Focus Group Questions

Focus groups

General Questions

1. What stands out as being the most effective use of LSTA in Montana over the last three years?
2. Are there specific examples of projects that you think were the most impactful on the lives of the citizens of Montana?
3. Are there specific changes in how LSTA funds should be expended in the future? Are there new or emerging needs that are unmet that need to be addressed?

Potential Follow-up Questions

1. What type of programs work for library patrons and staff, in general?
2. What type of programs work for public library patrons, school and academic library clientele, and library staff specifically?
3. What do non-participating libraries and borderline participants need to be able to participate in, grant funded projects or statewide programs?
4. How will the library patrons and library staff be satisfied with the delivery of services?
5. What programs will result in cost savings for participating libraries?

Outcome Questions

1. Will more patrons use the library services because of the grant programs?
2. Will there be an increase in community involvement in relation to the grant programs?
3. Will customer service improve due to staff training from LSTA funded events?
4. Will the statewide programs enhance libraries' abilities to serve patrons?

Interview guidelines

1. Introductions (include that you are working for QualityMetrics, a library consulting firm headquartered in Silver Spring, Maryland, established in 2016). Ask them to tell you a bit about themselves.
2. Ask their familiarity with LSTA program. If they are unfamiliar you can provide some or all of the below info -
 - a. *The Library Services and Technology Act's (LSTA) "Grants to States" program is the single largest source of ongoing federal funding for libraries. Many states spend funds on a combination of statewide initiatives and on subgrants awarded to individual libraries to enable them to launch innovative efforts or to extend services to populations that are difficult to reach.*
 - b. *The LSTA program requires that each state conduct an evaluation of its LSTA program every five years. These evaluations are overseen by the Institute of*

Museum and Library Services but are conducted by independent evaluators. QualityMetrics was selected to conduct the state-level evaluations for nine states in the Northeast and our company is also working with more than a dozen additional states and territories. The results of our review are due to be submitted to IMLS in March of 2022.

3. FOR THOSE WHO DO NOT WORK FOR THE SLAA (who manage a project):
 - a. Ask them to talk about the particular grant/s they worked with. Allow them to lead the conversation in an exploratory fashion. Ask follow up questions.
 - b. Identify where there are materials or data from their projects that it would be useful for us to see.
4. FOR THOSE WHO DO NOT WORK FOR THE SLAA (high level stakeholder):
 - a. Go through the plan goal by goal, remind them of the goal wording and the percent of funds the state spent on it, get their reflections on progress toward each goal.
 - b. Are there any future needs we should be emphasizing in the evaluation?
5. FOR SLAA STAFF on specific projects:
 - a. Ask them to talk about the particular programs they are responsible for
 - b. Let them know the data available (SPR, output, etc.) and verify that there is no other data or materials they have that would be helpful to us. If they only listed outputs in the SPR outcomes data, ask about plans for outcome data in the future.
 - c. What do you see as the needs moving forward for the next seven years?
6. ALL: What impact have you seen LSTA dollars have on your state?
7. ALL: Is there anything you think we should have asked that we didn't?

Appendix E: Web-Survey Instrument

Montana LSTA Survey

WELCOME

Every five years, each state library administrative agency in the nation is required to conduct an independent evaluation of its implementation of the Library Services and Technology Act (LSTA) "Grants to States" program. This evaluation must be submitted in order to qualify for ongoing Federal funding.

Following close on the heels of the evaluation is the requirement for the submission of a new state-level five-year plan for the LSTA program. QualityMetrics, Library Consultants is assisting the Montana State Library (MSL) with the evaluation.

QualityMetrics has been gathering information and data from a number of different sources including the State Program Report (SPR) that MSL submits annually to the Institute of Museum and Library Services (IMLS), internal statistical and narrative reports, survey data, and personal interviews with MSL staff as well as with representatives of the library community in the state. We'd like your help in assessing the impact of the LSTA program on your library and on the people that your library serves.

You are invited to share your thoughts and ideas by answering three short questions. The survey should take you no more than ten minutes to complete. The first question asks you to look back over the last few years and to consider how the LSTA program has benefitted libraries and library users. Second, we'd like to invite you to think about the future and to suggest new ways in which you think LSTA funds should be invested. Finally, we want to give you an opportunity to offer any other observations about Montana's LSTA program (positive or negative). Thank you in advance for helping the Montana State Library serve your community better!

Montana receives approximately \$1 million in LSTA Grants to States funding each year. The largest portion of this funding (about 39%) has been allocated to support of Collaboration with programs such as Information Access (which includes the Montana Shared Catalog, OCLC Group Services, and the Montana Courier Network), Downloadable E-Content (which includes MontanaLibrary2Go, DPLA, and the Montana Schools Shared Collection) and Montana Memory Project.

The second largest portion (27%) of the budget supports Outreach/Lifelong Learning which includes programs such as Montana Talking Book Library and Lifelong Learning.

The third largest portion (24%) of the budget supports Adequate Support which includes Consulting Services.

The fourth largest portion (10%) supports Community Leadership with programs such as Continuing Education.

The last portion supports Internet Access (> .5%).

LSTA dollars are used to supplement state and local funds and to foster creativity and innovation in meeting the needs of Montana's existing and potential library users and citizens.

1) Which programs had the greatest impact on your library and on the people your library serves?

| | No impact at all | Somewhat impactful | Very impactful | Not aware / do not use |
|-------------------------|------------------|--------------------|----------------|------------------------|
| Montana Shared Catalog | () | () | () | () |
| OCLC Group Services | () | () | () | () |
| Montana Courier Network | () | () | () | () |

| | | | | |
|-----------------------------------|-----|-----|-----|-----|
| MontanaLibrary2Go | () | () | () | () |
| Montana Schools Shared Collection | () | () | () | () |
| Montana Memory Project | () | () | () | () |
| Montana Talking Books Library | () | () | () | () |
| Lifelong Learning | () | () | () | () |
| Consulting Services | () | () | () | () |
| Continuing Education | () | () | () | () |
| Internet Access | () | () | () | () |

2) Think back over the past three years (2018, 2019, and 2020). Which, if any, of the LSTA-supported programs mentioned on the last page have had the greatest impact on your library and on the people your library serves? How is library service in your community better because of the investment of LSTA funds?

3) Look ahead to the next five years (2023 - 2027). Are there changes in the way that LSTA dollars are invested that you think would significantly improve library services in Montana? If so, what are they and why do you think that the change(s) would make a difference. *(Note that LSTA funding cannot be used for building facilities or for lobbying purposes.)*

4) Please feel free to offer any additional comments about Montana's LSTA program. What do you like or dislike about the program? What could be improved? *(Note that your responses are confidential and comments will not be identified with an individual or with a specific library.)*

5) The library that I represent is:

- A tribal library
- A public library
- A school library
- An academic library
- A special library
- Other (Please specify below.)

If you responded "Other" to the question above, please specify the type of library you represent in the text box provided below.

6) My role in the library that I represent is:

- Director
- Manager or Department Head
- Youth Services Librarian
- Adult Services Librarian
- Technical Services Librarian
- Technology Specialist
- Library Trustee
- Other (Please specify below.)

If you responded "Other" to the question above, please specify your role in the library you represent in the text box provided below.

Thank You!

Thank you for taking our survey. Your response is very important to us.

Montana Memory Project - Pop Up

WELCOME

Help us understand how this site is being used by answering a couple brief questions. Your input will help shape the future of the Montana Memory Project. Each respondent will be entered in a drawing for a chance to win a \$50 Amazon gift card!

Please take a couple of minutes to provide feedback about the Montana Memory Project and why it is important to you, your family, and your community. This survey is confidential: it is being conducted by independent evaluators, and library staff will not see your name associated with your response.

1) Are you a

Family historian

Researcher

Student

Teacher (K-12)

Instructor (post high school)

Browser (looking for enjoying only)

Other - Write In: _____

2) Right now, where are you?

At a library in Montana

At a school in Montana

Elsewhere in Montana (includes your home)

Outside Montana

Other - Write In: _____

3) Are you aware that you are using the Montana Memory Project?

Yes

() No

4) What do you think is most valuable about this service (the Montana Memory Project)?

5) What are you hoping to accomplish during this visit?

6) If you would like to be included in the drawing, please provide your email:

Thank You!

Thank you for taking our survey. Your response is very important to us. Enjoy the Montana Memory Project!

Montana Shared Catalog survey

WELCOME

This survey is being conducted from November 2021 to December 2021 by the Montana State Library to assess the Montana Shared Catalog (MSC). The data collected will be used to meet federal reporting requirements and to help establish the impact of the MSC to you and others who use it.

Thank you for your participation!

1) What are the primary ways in which you use the Montana Shared Catalog?

Academic research

Personal research

Education (instructor or student)

Fun and entertainment

Managing account

Other - Write In: _____

Working (for librarians)

2) How frequently do you use the Montana Shared Catalog?

About once or twice in a year

At least once every month

At least once every week

Every day

3) When you use the Shared Catalog, do you typically use it from...

A library in Montana

A school in Montana

Elsewhere in Montana (includes your home)

Outside Montana

Other - Write In: _____

4) What is the impact of the Montana Shared Catalog on the success of your project(s)?

No impact at all

Somewhat impactful

Very impactful

Essential for my work

5) Help us understand what you think is most valuable about this online service (i.e. type of materials, purpose of use, discovering new items, etc.):

6) If you could change something about the Shared Catalog, what would it be?

7) If you are a library staff member, does your survey response reflect your experience as a...

Back end user (using the software for work)

Front end user (using the catalog as a patron)

Not applicable

Thank You!

Thank you for taking our survey. Your response is very important to us. Enjoy the Montana Shared Catalog!

Appendix F: Measuring Success Crosswalk Table

| MONTANA Measuring Success Focal Areas and Intent | | | | | | | | | | |
|--|------------------------|----------------------------|----------------------------|------------------------------|----------------------------------|-----------------------|--------------------------|------------------------------|-------------------------|--|
| | 1.1 Information Access | 1.2 Montana Memory Project | 1.3 Downloadable E-Content | 1.4 Match-Only State Project | 2.1 Montana Talking Book Library | 2.2 Lifelong Learning | 3.1 Continuing Education | 3.2 Match-Only State Project | 5.1 Consulting Services | |
| Lifelong Learning | | | | | | | | | | |
| Improve users' formal education | | | | | | | | | | |
| Improve users' general knowledge and skills | | | | | | | | | | |
| Information Access | YES | YES | YES | | YES | | | | | |
| Improve users' ability to discover information resources | | YES | | | | | | | | |
| Improve users' ability to obtain and/or use information resources | YES | | YES | | YES | | | | | |
| Institutional Capacity | | | | YES | | | YES | YES | YES | |
| Improve the library workforce | | | | | | | YES | | | |
| Improve the library's physical and technological infrastructure | | | | | | | | | | |
| Improve library operations | | | | YES | | | | YES | YES | |
| Economic & Employment Development | | | | | | | | | | |
| Improve users' ability to use resources and apply information for employment support | | | | | | | | | | |
| Improve users' ability to use and apply business resources | | | | | | | | | | |
| Human Resources | | | | | | YES | | | | |
| Improve users' ability to apply information that furthers their personal, family or household finances | | | | | | | | | | |
| Improve users' ability to apply information that furthers their personal or family health & wellness | | | | | | | | | | |
| Improve users' ability to apply information that furthers their parenting and family skills | | | | | | YES | | | | |
| Civic Engagement | | | | | | | | | | |
| Improve users' ability to participate in their community | | | | | | | | | | |
| Improve users' ability to participate in community conversations around topics of concern | | | | | | | | | | |

Appendix G: Targeted Audiences Crosswalk Table

| MONTANA Target Population Served | | | | | | | | | | | | |
|-------------------------------------|--|---|--|--------------------------------|---------------------|-------------------------------|----------|---------------------|-------------------------------|----------------------|-------------------|--|
| | Library Workforce (current and future) | Individuals Living Below the Poverty Line | Individuals who are unemployed/underemployed | Ethnic or Minority Populations | Immigrants/Refugees | Individuals with Disabilities | Families | Children (aged 0-5) | School-aged Youth (aged 6-17) | General (aged 18-64) | Senior (aged 65+) | |
| 1.1 Information Access | YES | | | | | | | | | | | |
| 1.2 Montana Memory Project | YES | | | | | | | | | | | |
| 1.3 Downloadable E-Content | YES | | | | | | | | | | | |
| 1.4 Match-Only State Project | YES | | | | | | | | | | | |
| 2.1 Montana Talking Book Library | | | | | YES | | YES | YES | YES | YES | | |
| 2.2 Lifelong Learning | YES | | | | | YES | YES | | | | | |
| 3.1 Continuing Education | YES | | | | | | | | | | | |
| 3.2 Match-Only State Project | YES | | | | | | | | | | | |
| 5.1 Consulting Services | YES | | | | | | | | | | | |

Appendix H: Expenditure Tables

| MONTANA LSTA PROJECT EXPENDITURE SUMMARY | | | | | | | | | | | |
|--|------------------------------------|------------------------------|----------|----------|----------|---------------------------|---------------------------|---------------------------|---|------------------------------------|---------------------------------------|
| | | PROJECT TITLE/ Activities | FFY 2018 | FFY 2019 | FFY 2020 | FFY 2018 LSTA EXPENDITURE | FFY 2019 LSTA EXPENDITURE | FFY 2020 LSTA EXPENDITURE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL | PERCENTAGE EXPENDITURE WITHIN GOAL | PERCENTAGE OF TOTAL LSTA EXPENDITURES |
| Goal 1 | Collaboration | Information Access | X | X | X | \$ 248,846.93 | \$ 253,857.13 | \$ 234,150.59 | \$ 736,854.65 | 55.13% | 21.87% |
| | | Montana Memory Project | X | X | X | \$ 89,138.95 | \$ 102,120.99 | \$ 145,961.81 | \$ 337,221.75 | 25.23% | 10.01% |
| | | Downloadable E-Content | X | X | X | \$ 41,821.57 | \$ 77,000.00 | \$ 143,600.14 | \$ 262,421.71 | 19.64% | 7.79% |
| | | GOAL SUBTOTAL | | | | \$ 379,807.45 | \$ 432,978.12 | \$ 523,712.54 | \$ 1,336,498.11 | 100.00% | 39.66% |
| | | PROJECT TITLE/ Activities | FFY 2018 | FFY 2019 | FFY 2020 | FFY 2018 LSTA EXPENDITURE | FFY 2019 LSTA EXPENDITURE | FFY 2020 LSTA EXPENDITURE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL | PERCENTAGE EXPENDITURE WITHIN GOAL | PERCENTAGE OF TOTAL LSTA EXPENDITURES |
| Goal 2 | Outreach/ Lifelong Learning | Montana Talking Book Library | X | X | X | \$ 317,413.55 | \$ 90,926.13 | \$ 148,829.74 | \$ 557,169.42 | 69.30% | 16.53% |
| | | Lifelong Learning | X | X | X | \$ 72,431.09 | \$ 87,612.98 | \$ 86,745.65 | \$ 246,789.72 | 30.70% | 7.32% |
| | | GOAL SUBTOTAL | | | | \$ 389,844.64 | \$ 178,539.11 | \$ 235,575.39 | \$ 803,959.14 | 100.00% | 23.86% |
| | | PROJECT TITLE/ Activities | FFY 2018 | FFY 2019 | FFY 2020 | FFY 2018 LSTA EXPENDITURE | FFY 2019 LSTA EXPENDITURE | FFY 2020 LSTA EXPENDITURE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL | PERCENTAGE EXPENDITURE WITHIN GOAL | PERCENTAGE OF TOTAL LSTA EXPENDITURES |
| Goal 3 | Community Leadership | Continuing Education | X | X | X | \$ 101,376.63 | \$ 101,442.18 | \$ 95,321.05 | \$ 298,139.86 | 100.00% | 8.85% |
| | | GOAL SUBTOTAL | | | | \$ 101,376.63 | \$ 101,442.18 | \$ 95,321.05 | \$ 298,139.86 | 100.00% | 8.85% |
| | | PROJECT TITLE/ Activities | FFY 2018 | FFY 2019 | FFY 2020 | FFY 2018 LSTA EXPENDITURE | FFY 2019 LSTA EXPENDITURE | FFY 2020 LSTA EXPENDITURE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL | PERCENTAGE EXPENDITURE WITHIN GOAL | PERCENTAGE OF TOTAL LSTA EXPENDITURES |
| Goal 4 | Internet Access / Adequate Support | NO PROJECTS | | | | | | | | 0.00% | 0.00% |
| | | GOAL SUBTOTAL | | | | \$ - | \$ - | \$ - | \$ - | 0.00% | 0.00% |
| | | PROJECT TITLE/ Activities | FFY 2018 | FFY 2019 | FFY 2020 | FFY 2018 LSTA EXPENDITURE | FFY 2019 LSTA EXPENDITURE | FFY 2020 LSTA EXPENDITURE | THREE YEAR (FFY 2018, FFY 2019, FFY 2020) EXPENDITURE TOTAL | PERCENTAGE EXPENDITURE WITHIN GOAL | PERCENTAGE OF TOTAL LSTA EXPENDITURES |
| Goal 5 | Adequate Support | Consulting Services | X | X | X | \$ 170,727.36 | \$ 332,321.59 | \$ 299,558.70 | \$ 802,607.65 | 100.00% | 23.82% |
| | | GOAL SUBTOTAL | | | | \$ 170,727.36 | \$ 332,321.59 | \$ 299,558.70 | \$ 802,607.65 | 100.00% | 23.82% |
| | | LSTA PROGRAM ADMINISTRATION | | | | \$ 36,966.92 | \$ 43,553.00 | \$ 48,090.32 | \$ 128,610.24 | 100.00% | 3.82% |
| | | GRAND TOTAL | | | | \$1,078,723.00 | \$1,088,834.00 | \$1,202,258.00 | \$ 3,369,815.00 | 100.00% | 100.00% |

Appendix I: Web-Survey Reports

We did three surveys in Montana, one is an LSTA survey targeted at all library staff and stakeholders interested in providing feedback on the LSTA program in Montana; a second on the Montana Memory Projects; and a third on the Montana Shared Catalog. Results summarized below with a link to full results available through the online interface.

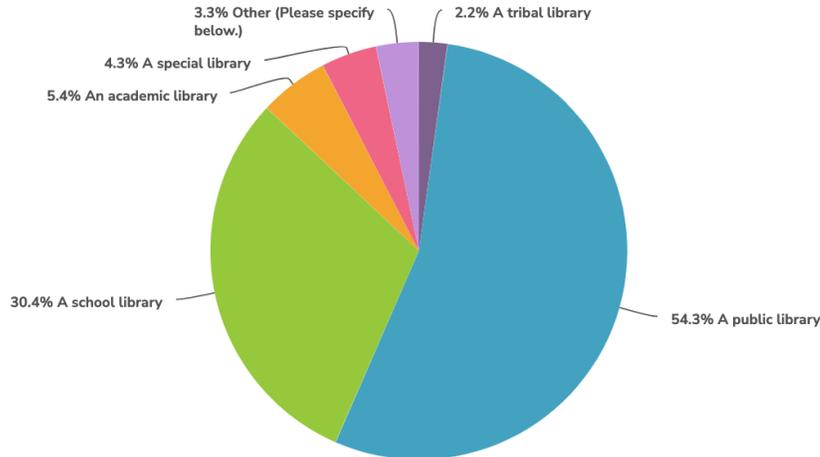
Montana LSTA Summary

https://reporting.alchemer.com/r/71852_618540608277a3.47993347

Findings

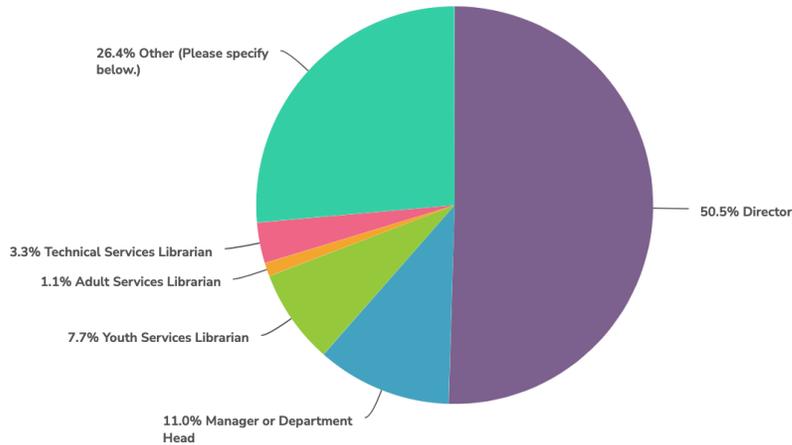
The survey received 92 responses with a 100% completion rate. As shown in figure 1, 54.3% of respondents (50) work in a public library, 30.4% of respondents (28) work in a school library, 5.4% of respondents (5) work in an academic library, 4.3% of respondents (4) work in a special library, and 2.2% of respondents (2) work in a tribal library. 3.3% of respondents (3) indicated “other” which includes school and community libraries.

Figure 1. The type of library in which respondents work



Respondents make up a diverse pool of roles within their libraries. As shown in figure 2, 50.5% of respondents (46) are library directors, 11.0% of respondents (10) are a library manager or department head, 7.7% of respondents (7) are Youth Services Librarians, 3.3% of respondents (3) are Technical Services Librarians, and 1.1% of respondents (1) are Adult Services Librarians. 26.4% of respondents (24) indicated “other” which includes teachers, school librarians, and library assistants.

Figure 2. Role of respondents within their library



Looking Back

Respondents were provided a list of 11 programs and were asked to rank the impact on their library and patrons for each program. Respondents were asked to choose from no impact at all, somewhat impactful, very impactful, or not aware/do not use. Figure 3 shows the complete table of programs and responses. The programs ranked the highest impact from respondents include the MontanaLibrary2Go with 76.9% of respondents selecting “very impactful”, the Montana Shared Catalog with 75% of respondents indicating that this program was “very impactful”, and the OCLC Group Services with 64.4% of respondents indicating “very impactful”.

Figure 3. Program Impact

| | No impact at all | Somewhat impactful | Very impactful | Not aware / do not use |
|---|------------------|--------------------|----------------|------------------------|
| Montana Shared Catalog Count Row % | 7 7.6% | 7 7.6% | 69 75.0% | 9 9.8% |
| OCLC Group Services Count Row % | 6 6.7% | 17 18.9% | 58 64.4% | 9 10.0% |
| Montana Courier Network Count Row % | 19 21.8% | 10 11.5% | 26 29.9% | 32 36.8% |
| MontanaLibrary2Go Count Row % | 3 3.3% | 13 14.3% | 70 76.9% | 5 5.5% |
| Montana Schools Shared Collection Count Row % | 13 14.6% | 6 6.7% | 21 23.6% | 49 55.1% |
| Montana Memory Project Count Row % | 14 16.3% | 41 47.7% | 19 22.1% | 12 14.0% |
| Montana Talking Books Library Count Row % | 14 16.5% | 33 38.8% | 12 14.1% | 26 30.6% |
| Lifelong Learning Count Row % | 17 19.8% | 20 23.3% | 24 27.9% | 25 29.1% |
| Consulting Services Count Row % | 18 20.9% | 21 24.4% | 23 26.7% | 24 27.9% |
| Continuing Education Count Row % | 10 11.8% | 23 27.1% | 38 44.7% | 14 16.5% |
| Internet Access Count Row % | 12 14.0% | 6 7.0% | 49 57.0% | 19 22.1% |

Respondents were then asked to think back over the last three years and identify which LSTA-supported program mentioned in the previous question had the greatest impact on their library and the people they serve. Respondents discussed three major main themes in their responses. Library access/content, library capacity, and COVID-19 were discussed the most when discussing LSTA programs that have had the greatest impact on their communities and libraries. Figure 4 shows the percentage of respondents who discussed each theme. This question received a total of 87 responses. The Montana Shared Catalog was mentioned by 67.8% of respondents (59) as the most impactful program. 44.8% of respondents (39) mentioned MontanaLibrary2Go and 22.9% of respondents (20) indicated that the OCLC Services were most impactful. Figure 5 below shows the complete breakdown of impactful programs.

Figure 4. Main Themes

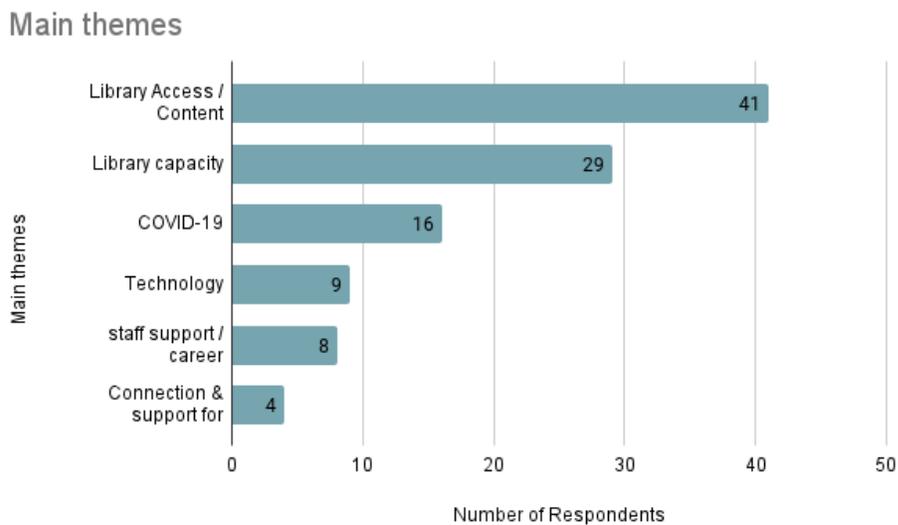
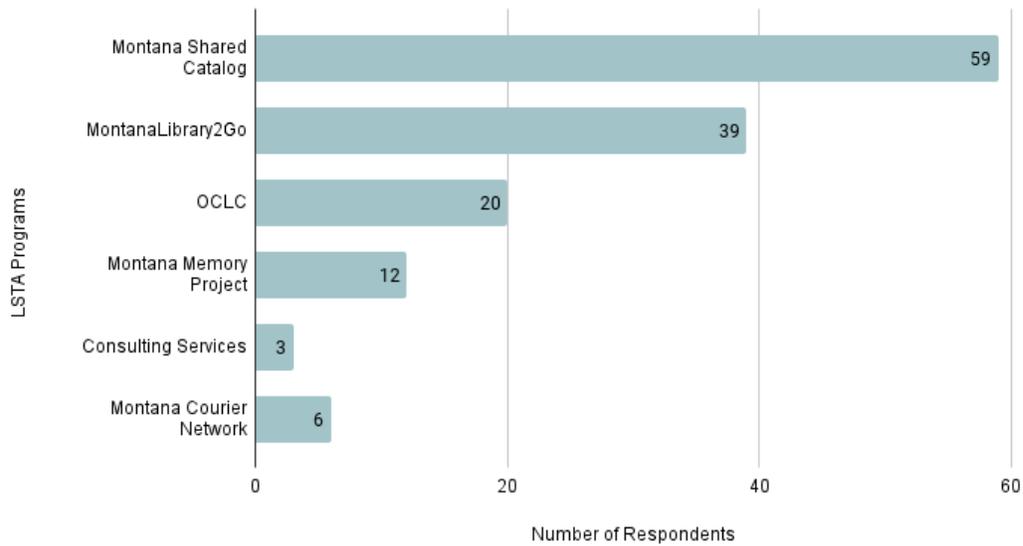


Figure 5. LSTA Impactful Programs

LSTA Programs



Below are a selection of comments about the benefits of these programs.

Montana Library2Go (Libby) and Sora/Overdrive shared collection for the schools have had a HUGE impact on our schools. These tools in conjunction with the online catalogMSC have opened many opportunities to read about, locate, read and/or listen to books! These tools not only open up new information about and access for reading materials, but break down the barriers to the world outside of our school walls. Using Sora alongside Libby/MTLib2Go is a great way to share public library offerings and builds curiosity and desire to explore more. The shared catalog is a great tool for locating materials and borrowing between schools in our district. I also use it to double check age appropriateness of materials I may wish to purchase for my school. I check to see, for example, if any other middle schools (or elementary or HS) have the title in question. The summaries are helpful there too. Students love to use this for summaries (great for book reports after they turned in a book but forgot the author or number of pages, etc.) Thanks for all of this... and so much more!

Montana Shared Catalog!!! Hands down the best investment for our school. We could not have a library without the MSC and the cataloging help that we get from OCLC. I copy catalog 90% of our Spanish books from the OCLC since they are not in other libraries. While our library isn't part of the MontantLibrary2Go-I teach how to access for our students who belong to the public library.

Our patrons have benefited immensely having downloadable content and the courier service through the Shared Partnership. It expands access to collections previously unavailable to them except through Inter-library Loan Services. During the pandemic shutdown having e-resources was invaluable! Also, wi-fi connectivity is greatly needed with our most vulnerable patrons, so the public library is the hub of the community.

Consulting Services are vital to staff because with a one person library it is impossible to keep up to date on every aspect because of the lack of time and ability to ferret out knowledge. For the patrons OCLC is vital because without it the library would have no services.

The MSC, Courier Networks (Partners mainly), and Montana2Go have had the greatest impact on the amount of materials we have been able to provide to our patrons at a cost savings to our library. Because of these shared services and cost formula, we have been able to participate in these exceptional programs. Especially during Covid-19 isolation times, these services have proven to be invaluable to many patrons. LSTA funding has helped make these programs affordable for our community.

I think the programs that had the greatest impact on our library services are the Montana Shared Catalog, MontanaLibrary2Go, Internet Access, and the Montana Courier Network. Since we are in such a rural community, giving patrons the option to browse and check out items online is very convenient for them since it's not always easy to make it to the library during our regular hours. Having internet access while things were shut down due to COVID helped people be able to hold virtual meetings and classes. It also provided the library a way to continue virtual story time during the closing period.

Being part of the Montana Shared Catalog is huge. It makes my library contents and that of all other Montana libraries at the tip of patrons fingers ready to use with a simple request. MontanaLibrary2Go use has soared since the very first year back when it was just audio books. The pandemic of course greatly increased its use even more. OCLC Group services for Inter Library Loan makes information easily accessible to everyone, and especially one of my favorite patrons who is reading all the presidents in order. As a small rural library, the ability to be part of a consortium increases my buying power and the Montana State Library bargaining on my libraries behalf is the most fiscally responsible way to get the biggest return for every dollar spent. I personally as a taxpayer appreciate all the State library does to stretch our funding.

Looking Forward

Survey respondents were then asked to think ahead to the next five years and provide suggested changes in the way that LSTA funds are invested. Suggestions mentioned more than twice include extending the shared catalog to all libraries in Montana, access to databases like EBSCO, continuing the partnership with the public school systems and libraries, marketing library services to communities, and continued and additional funding to electronic resources and digital books. Below are a list of other recommendations as well as selected comments from respondents.

- Invest in the courier services
- Connectivity in rural Montana
- Hotspot program
- Expanding individual library collections
- DEI initiatives focused on staff recruitment/retention, public service, and collection development
- Additional staff

1. I think increased funding for the Overdrive/Ebook collection would be well used, especially to buy more copies of the most popular books. Many well known authors have wait times that are months long for their newest releases. This could be mitigated with more copies of the books. 2. I think that the continuing education programs are really important for community building, and would like to see this continued. 3. Teen services! I think it is so important to serve the young people with programming that appeals to them. To this end, I think that having specialized young adult librarians is really important. 4. Montana Memory Project is also so important. I really want to see stories recorded, and documents, letters, journals and photographs archived. Continued funding for photographing these documents and outreach to get these special items recorded before they disappear.

I would love to see the LSTA funds utilized to offset our increasing demand for digital services. Our library invested in Hoopla, for example, and it has been very successful. We have to be extremely careful with our budget and we watch our totals daily on the dashboard to ensure we are on track. When we started offering the service we had calls from all over the state asking if they could purchase a digital card specifically to access Hoopla.

I would like to keep intact the OCLC Group Services and the Montana Shared Catalog. If there were additional options, I would love to see a discovery product, and also investments to support multiple libraries (including special libraries) in acquiring online databases or journal subscriptions available for Montana residents and employees.

An expanded courier network would be useful; either to include more libraries, or to ensure faster delivery of materials. The MontanaLibrary2Go is gaining in popularity, especially the use of audio books. Funding to expand and fill out the collection would be well spent. We have found that though our ipads and laptops are rarely used, mobile Hotspots are very popular. A small thing, but the purchase of thumb drives, charging stations, and headphones may help to enhance our user's experience. We do occasionally have patrons who are looking to research family or local history and the Montana Memory Project would seem to be a great place to begin, however it seems to have stalled with the digital upload of newspapers, year books etc. Perhaps this is just a perception.

Continuing the Hotspot program, paying for the data and taking care of problems is very important. We could never afford to offer as much to our patrons. These hotspots allow people to study remotely, work remotely, and use the internet for other purposes when they cannot afford internet service themselves. Continuing MontanaLibrary2Go and the magazines are also crucial. In our far-flung county, it is not always so easy to get to the physical libraries

I think that the MSL needs to invest in a cataloger/metadata librarian position. There needs to be a person on staff that is a trained cataloger and understands the needs and functions of the catalog and how to assist with its management and upkeep. Ideally this person would also be experienced in NACO and authority work in general. The catalog is the backbone of the state system and how our researchers find information and the fact there is no longer a cataloger on staff is disheartening.

Add a suite of statewide databases that serve all library types.

Improvements to the MSC ILS in terms of functionality and modernization. Infrastructure development for a statewide library consortium similar to those found in other states. Additional

funds for MontanaLibrary2Go. DEI initiatives focused on staff recruitment/retention, public services, and collection development.

Additional Comments

It is absolutely critical for developing and implementing collaborative services. Libraries always have a responsibility to be responsible stewards of public funds, and in a time when public services are under threat, it is doubly important that we find ways to address redundancy, improve efficiency, and reduce waste. By doing this strategically, and with the support of LSTA funding, we are able to do all of these things, and actually offer objectively BETTER services to library users, improve local libraries' efficiency, and recover funds for other local priorities.

I feel some of the consultation services could use improvement. When ask to come to meetings, it seems as though they have very little to add or talk about. Also, our consultants don't seem to have very much knowledge about working in a library. How can someone train a new library director or staff when they have never been in that position.

I love being able to utilize OCLC, however it is not utilized enough in our school to justify our own account and our local library has been very helpful in allowing my occasional use for our school library collection. I love the cost that we are allowed to have to pay for use of ebooks. That was a wonderful addition to our library in an extremely cost effective manner for our small school.

I have a deep appreciation for the programs that we participate in. I would like to see more promotion of The Montana Memory Project. Maybe a laptop set up specifically for the use of MMP that we could set up in our library. A MMP station set up for easy access. Continuing education is working well for me, especially since ASPEN. MontanaLibrary2Go is getting easier on the administrative end. Once again the thing that makes these programs work is the Montana State Library Staff that's helping us use them effectively.

sorry to harp on an old problem, but there still seems to be a problem with bottlenecks around partnership sharing / courier deliveries. Our courier tells us that at times there are at least dozens, if not hundreds of crates at a hub, waiting ... sorting? And many times the call goes out among the partners for empty crates, though many libraries seem to purchase a good many, we certainly do. Could funds be set aside for personnel - even part time - to help alleviate any pressure points?

Great program. More training and education about the services that are available would be good.

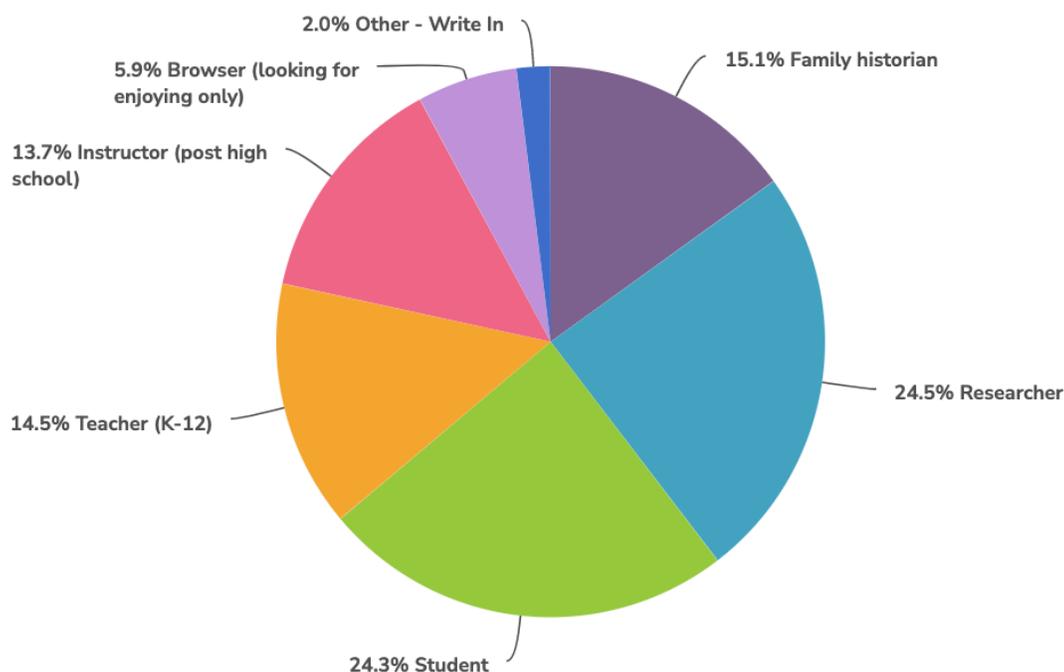
I would like more focus on the school libraries, which are the PRIMARY libraries for most families, and circulate SO MANY books! Help with programming, and appropriate digital services would be utilized and appreciated greatly.

Montana Memory Project

https://reporting.alchemer.com/r/71852_6160f373e75a64.00557650

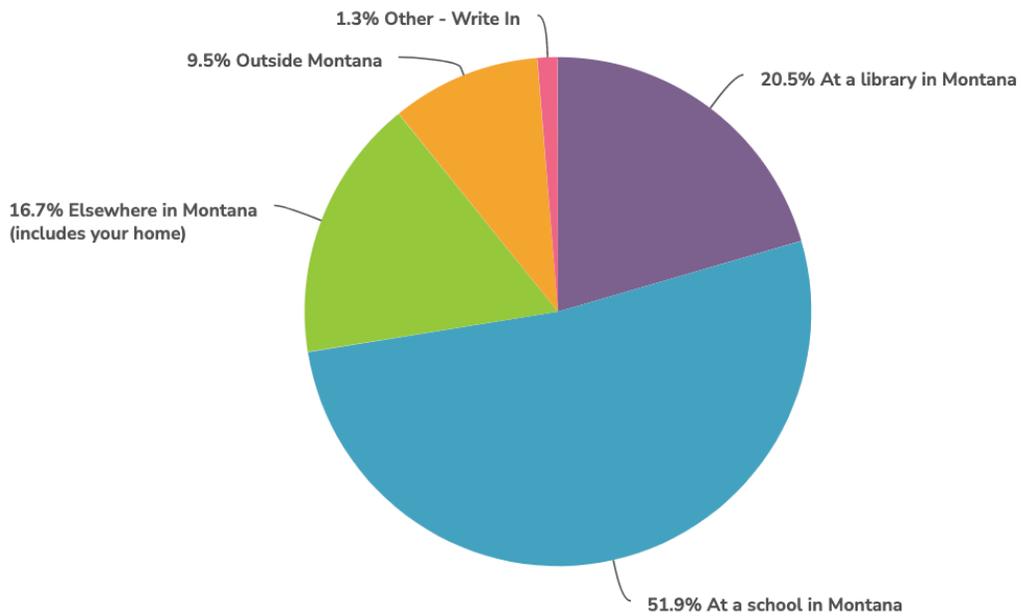
The state of Montana asked participants of the Montana Memory Project – Pop Up to gather an understanding of users and their reasoning for participating. The survey received 1,154 completed responses. Of the 1,154 respondents, 1,147 individuals responded to the first question identifying who they are. Figure 1 below shows a breakdown of respondents. 283 (24.7%) individuals indicated that they were a researcher, 278 (24.2%) individuals indicated they were students, 174 (15.2%) individuals indicated that they were a family historian, 166 (14.5%) respondents are K-12 teachers, 156 (13.6%) respondents indicated that they are post high school instructors, 67 individuals shared they were looking for enjoyment and browsing only, and 23 (2.0%) respondents indicated “other”.

Figure 1. Respondents



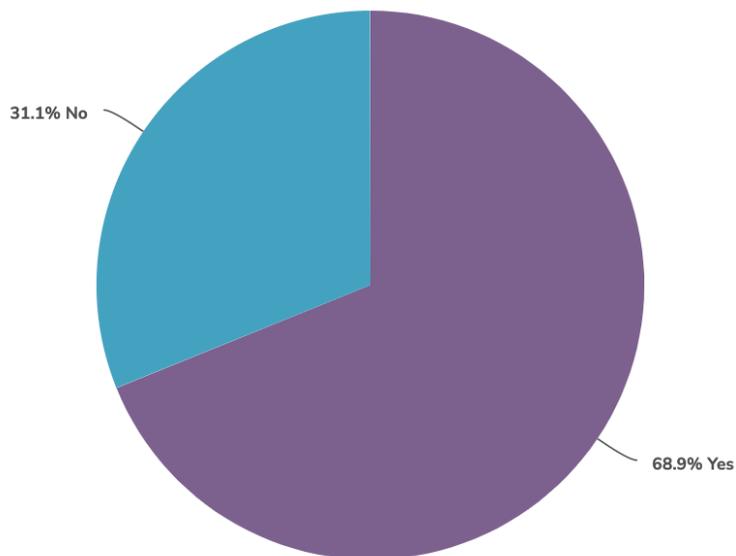
When asked the location they were answering the survey, 1,148 individuals responded. Over half (51.8%) indicated that they were in a school in Montana. 236 respondents were at a library in Montana, 192 (16.7%) indicated they were elsewhere in Montana (including their home), and 110 (9.6%) shared they were outside of Montana. 15 (1.3%) respondents indicated “other”.

Figure 2. Respondents' location



When asked if they were aware that they were using the Montana Memory Project, 791 (69.0%) respondents indicated yes and 355 (31.0%) respondents indicated they were not aware that they were using the Montana Memory Project, as shown in figure 3 below.

Figure 3. Awareness of use of Montana Memory Project



Respondents were then asked to identify what they believe the most valuable aspect of the Montana Memory Project is. 259 individuals indicated that history is what is most valuable about the Montana Memory Project. Twenty-eight respondents shared that the old photos are most valuable, eleven individuals indicated that preservation is most important and seven indicated that the memories are most important. Figure 4 shows the complete breakdown of responses. Below are selected comments regarding the valuable aspects of this service.

Remembering the past. And always remembering pictures are worth a thousand words but it might take 10,000 to describe the picture!

The plethora of people and places that may not be known by folks in Montana, even lifelong Montanans.

Engaging historical photos for students to peruse for the sake of stories, research, and local history.

Shows important history of Montana. My family has owned land near Havre for almost 100 yrs.

Old photographs and any history from the early 1900's especially from the NE Montana area.

Your posts on Facebook opened doors that I didn't know were there. I am 3rd Gen Montanan and because of age and health your posts give me new parts of our history to learn about. Thank you

I love the history of the West and have traveled throughout Montana many times. Often the pictures depict a place I've been and if not I go right to a map

Great preservation of historical and contemporary resources

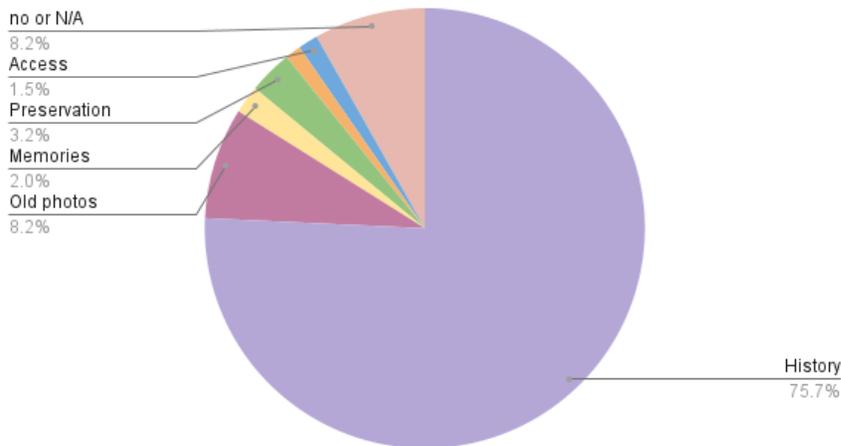
Free access to records across the state allows for much more access to our history for the average Montanan.

The ability to discover photos of people and places around my fathers birthplace and boyhood home

Primary sources for local history for National Register evaluation. I use the County Histories often as a first stop in investigating local significance.

Figure 4. Valuable Aspects of the Montana Memory Project

Valuable Aspects of the Montana Memory Project



When asked what respondents hoped to accomplish during their visit, 174 indicated that they hoped to increase their knowledge. 78 individuals shared that they were completing the survey to support the project and 31 respondents shared that they visited the site out of curiosity. 58% of responses for this question were unusable or incomplete. Figure 5 below shows the complete breakdown of responses. Below are a selection of comments from survey respondents on what they hoped to accomplish during their visit.

Any information about life, families or the railroad life in the Glendive to Wolf Point area.

I simply want to learn about Montana History.

I want to learn more about the man who homestead my ranch

Seeing photos of the area I grew up

Finding historical information.

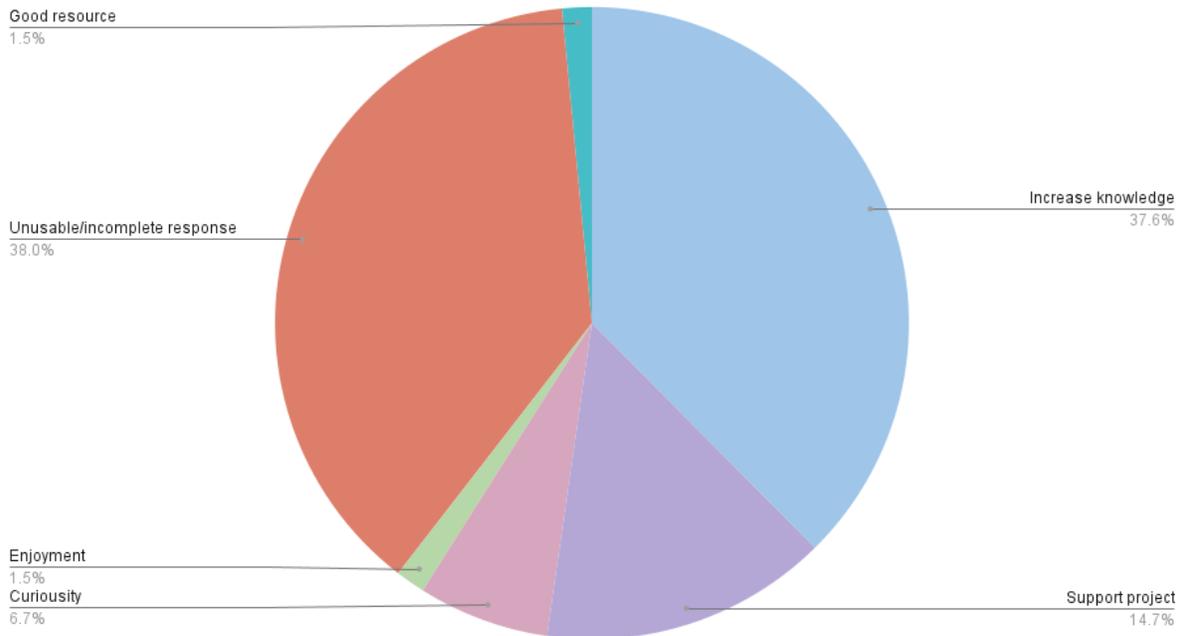
Learn more about my home State.

Discovering new info and sharing with my 92year old father from Lewistown Montana

Just browsing as I normally do in an effort to learn more about the Montana my family first came to in 1870

Figure 5. Use of the Montana Memory Project

Use of Montana Memory Project

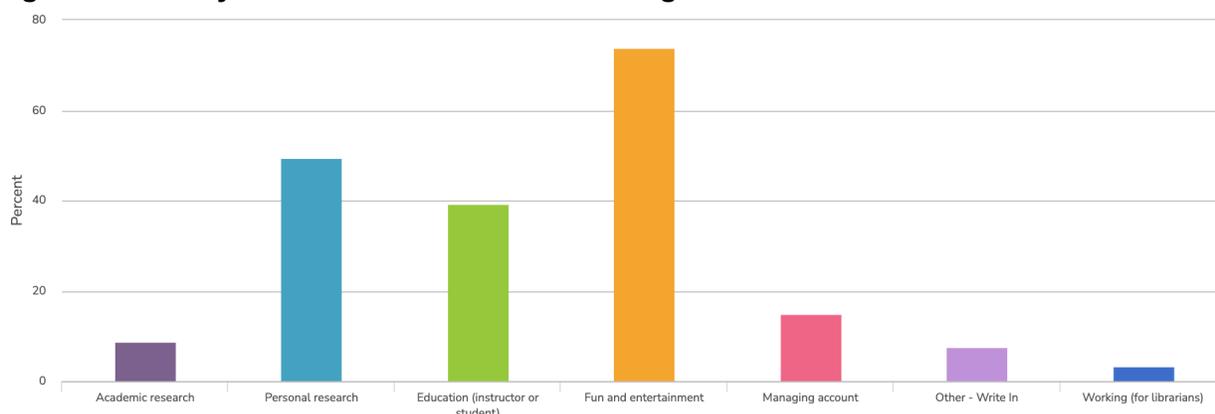


Montana Shared Catalog Survey Summary

https://reporting.alchemer.com/r/71852_6191c7dd2497d0.71531025

The Montana Shared Catalog put out a survey to gain a better understanding of its users. The survey received a total of 1,632 responses. The first question respondents were asked to answer asked the primary ways in which they use the Montana Shared Catalog. Respondents were given 7 options to select from including academic research, personal research, education (instructor or student), fun and entertainment, managing account, working (for librarians), and other. 73.9% of respondents (1,190) indicated that they used the Montana Shared Catalog for fun and entertainment, 49.4% of respondents (796) indicated they use it for personal research, 39.4% of respondents (635) indicated they use it for education, whether they are an instructor or student. Figure 1 below shows the results for all options provided to survey respondents.

Figure 1. Primary use of Montana Shared Catalog



Respondents were then asked how often they use the Montana Shared Catalog. This question received a total of 1,610 responses. Respondents were provided with 4 options to select indicating frequency of use. These options included about once or twice in a year, at least once every month, at least once every week, or every day. As shown in figure 2 below, 38.4% of respondents (619) indicated that they use the Montana Shared Catalog at least once every month. 31.4% of respondents (506) indicated that they use the Montana Shared Catalog at least once every week, and 23.6% of respondents (380) reported use about once or twice in a year. 6.5% of respondents (105) indicated that they use the Montana Shared Catalog every day.

Respondents were also asked to indicate the location from which they use the Shared Catalog. This question also received a total of 1,610 responses. Figure 3 shows the breakdown of responses for this question. 40.5% of respondents (652) indicated that they use the Shared Catalog elsewhere in Montana, which includes their home. 33.1% of respondents (533) indicated that they use the Montana Shared Catalog in a school in Montana, 23.2% of respondents (373) indicated that they use it in a library in Montana, 0.4% of respondents (7) indicated that they use it outside of Montana.

Figure 2. User frequency of the Montana Shared Catalog

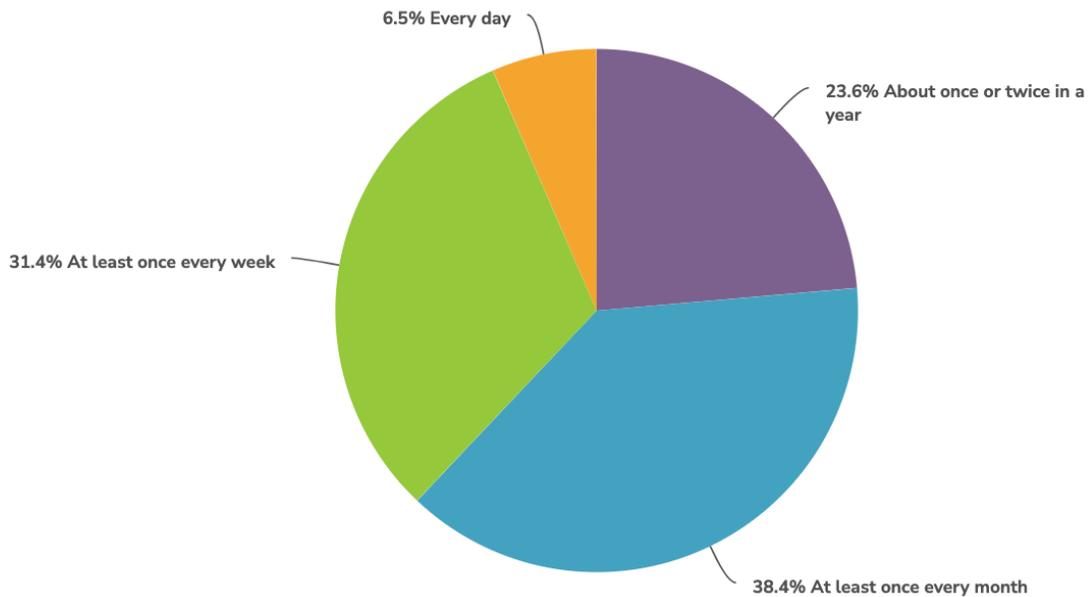
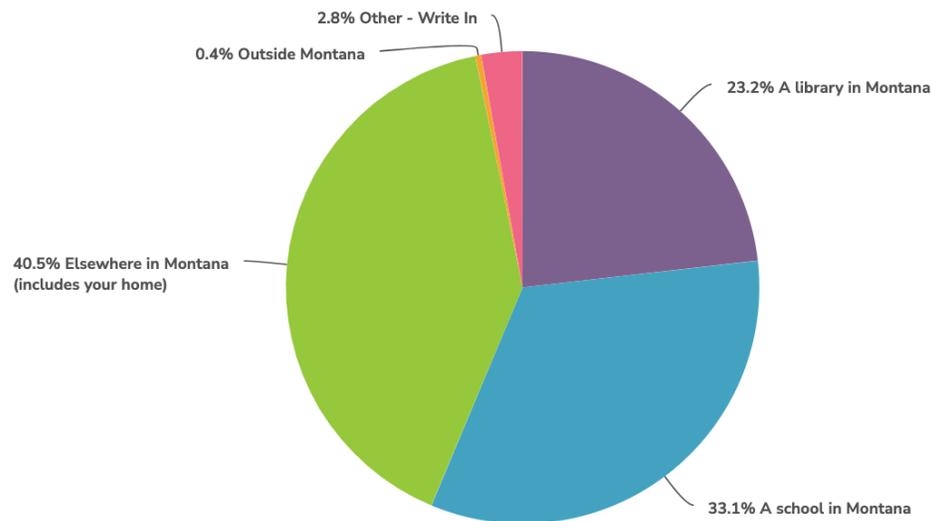
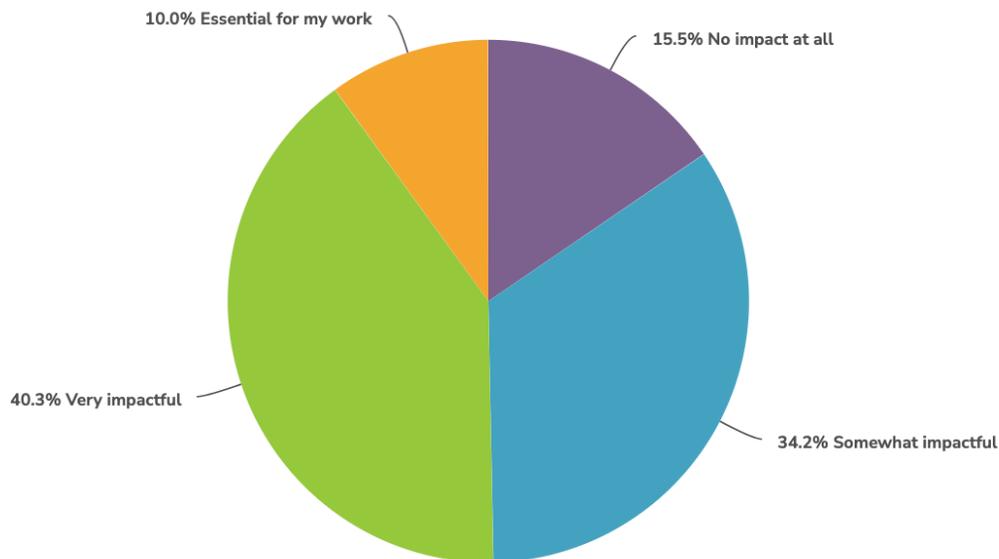


Figure 3. Location of Montana Shared Catalog Users



Question 4 asked respondents the impact of the Montana Shared Catalog on the success of their own project(s). This question received a total of 1,589 responses. Respondents were asked to choose from four options including no impact at all, somewhat impactful, very impactful, and essential for my work. Figure 4 shows the chart with results. 40.3% of respondents (641) indicated that the Montana Shared Catalog has been very impactful for their projects. 34.2% of respondents (543) indicated that the Shared Catalog has been very somewhat impactful. 15.5% of respondents (246) indicated that the Shared Catalog had no impact at all and 10% of respondents (159) indicated that the Shared Catalog is essential for their work.

Figure 4. Impact of Montana Shared Catalog on the success of respondents' projects



Respondents were then asked to identify what they believe the most valuable part of this service is. There were a total of 1,138 responses to this question. There were four main themes discussed in the comments. 39.5% of respondents indicated that access to a wide variety of materials, especially if they were residing in a rural town in Montana, was identified as the most valuable aspect of this service. 25.3% of respondents indicated that the ease of the search feature is the most valuable aspect. 18.7% of respondents indicated that the convenience of this service was most valuable, this included being able to use from anywhere, especially at home. Finally, 7.2% of respondents indicated that discovering new topics is the most valuable part of the Montana Shared Catalog. Below are comments from survey respondents.

I like being able to see what is available on a particular subject (although the software seems extremely poor in some categories, neglecting to list books that ARE on the shelves), and being able to find out quickly what books are available by favored authors so that I can put them on hold from home.

Access for rural residents - ability to search and place holds to be picked up on a monthly trip to town rather than depending on time in-library for browsing and getting only what happens to be in your library that day.

Because my library's collection is limited, and my interests tend to be broad and somewhat out of the mainstream, it is helpful to be able to draw on the Montana Shared Catalog to find a book that I need. Often, the catalog finds books for me at UM or MSU libraries, for example.

Becoming aware of the resources and their availability from my desk at home is enormously valuable. I can search and request from home and pick up what I requested when I am notified.

Definitely the purpose of use. Given that my library is so small, I depend heavily on the online catalog to look up books for my children and request holds from all other shared libraries in the state. I also love exploring other recommendations given here, based on my searches.

During Pandemic and Covid, Website is VERY Important to be able to use from home on PC.

Finding important publications (books, magazines, audiobooks, film) to further my study of and reporting on disability and other issues. And being able to put items on hold to pick up saves me a lot of time.

I am a homeschool, homemaker and martial arts coach. I have created lists on my account that allow me to easily access book titles on specific topics with ease. I put new books on hold weekly for homeschooling. Being able to do this online, with two young children, has made it possible for me to have success. I am extremely grateful!

I am basically home bound and use the ebooks often and the online account management devices to maintain my books checked out/ returned/ renewed and to place holds. The overall library is vital to my quality of life as a 71 year old. I must emphasize that- vital to my quality of life and as a lifeline to the world. Thank you!

Respondents were then asked to provide any suggested changes to the Montana Shared Catalog. This question received a total of 852 responses. 341 of these responses recommended no change at this time.

A list of recommendations made by respondents is below:

- Updating the search engine: search based on media type (print, ebook, audiobook, movie), close match titles and author names, search by library location, search for exact titles
- A feature where patrons can see all of the books they have previously checked out
- Recommendations on other books based on previously checked out books
- Expand ILL to additional libraries in the state
- Update the hold feature to include tracking place in line for holds, show the number of holds on an item
- Expected delivery date to local library from shared partner libraries
- User friendly way to save books to lists on the app
- A list of award-winning books. For example, the National Book Award books and New York Times best-seller list

Below are specific comments from respondents on recommended changes to the Montana Shared Catalog.

The online version that I access on my phone doesn't work as well as the one on the computer. You can't see if or where an item is available until you click on it and that can be annoying. I wish you were narrowing down the results using the filters on the left that didn't reset every time you clicked on a new filter, those features are a little glitchy. Also if I'm checking on a book I have a hold on from the hold screen and I click on the title to check if it is transit or when it was checked

out by someone else (to estimate how long I'll have to wait), it takes me to the entire state of Montana catalog, not the partners shared group which is where the hold would be coming from so I can't learn anything from that.

Movies separated more by genre, etc. I would love to be able to browse musicals and documentaries that I can use in my classroom without knowing what I'm looking for in advance. Discovering new things in this area would be very exciting.

more access to a variety of material -- only have what I can order and have delivered -- and libby -- I use out of state libraries because I cannot get from montana. It was sad to have Hoopla canceled - that at least offered some materials that the library did not carry.

make a wish/reading list for items I find that I'm not ready to borrow yet. And be able to find library to go materials via the catalog instead of needing to log into the other platform first

It would be nice to have the capability to browse by sub-genre, to have lists of related books, and it would be nice to be able to recommend titles for purchase as easily as it is in Overdrive.

Inter-library loans at no cost and with unlimited number of resource access to the library user. The current limit of five ILLs per person per year is unrealistic for research purposes and for at-home student learning.

*I would make certain that: *any series offered would be complete and in the same format (no ebook and audio mixing) *offer more national book award winners/finalists *Montana writers would be well represented.*

I would like to be able to see what my place in line for a hold is, so I can decide whether or not to keep the hold, cancel it, etc. To be able to edit the name of my book lists more easily. Beyond those two things, I'm not really sure as I haven't run into any other hiccups.

I would expand its capability so that for those materials which are not directly contained in the MSC there is an easy link to the other sources that the library uses to obtain inter-library loans. This would facilitate and ease librarian use.

I would like to have the ability to see what books I have checked out in the past. I don't always have the list of books I have read and if I could log on to my account for this information, that would be helpful.

I would add "search for exact title." Maybe it's already there, but I haven't found it. What I do find is that searches on specific subjects often produce lots of irrelevant titles.

I wish it was easier to save books into lists. I think the web version had that feature although it was frustrating to use. I really wish the app had that option as well. Sometimes I'll look to see if the library has a book I'm interested in or a book I wanted to get for my daughter but I just want to remember it - not necessarily put it on hold to check out. So I'd love the option to create and save books to different lists. Or integrate the library catalog with a service like GoodReads to save a book there and see the availability at the library. I mean in the grand scheme this is a small request and it's not a big deal to go between my separate book list and the library app but it would be lovely to have the option to create saved lists in the library app.

Have an option to choose what library you can search for a book. For example, looking for Hanukkah books in the CFalls library without showing books in different libraries and having to wait an extended amount of time to receive the requested book.

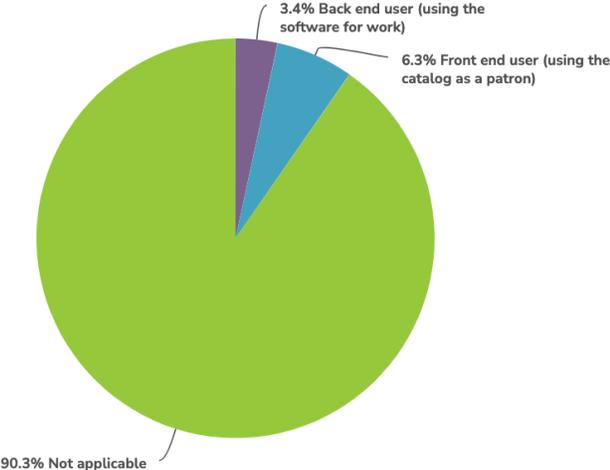
Ability to see how soon a book might be available. Right now, it will just say "pending" or "in transit" but that doesn't give much of an idea as to when the item might arrive to be picked up.

1) Renew materials when "blocked" because more than 10 items past due date. Sometimes these items are otherwise renewable, I'm one day late, and I wish I could get my account working again to place holds, etc. I have to either come in and ask for help or call in and that can be difficult with a toddler, pandemic, life, etc. 2) When I click on a subject heading or an author heading in an item record, I get a keyword search for the words in the heading, not an actual SUBJECT or AUTHOR search. for example, clicking links for: American Sign Language -- Dictionaries. Gordon, Jean M., 1959- --> gives me all records that keywords match those INDIVIDUAL words, it's not even an exact phrase match (like in quotes " "). This is especially a problem if I'm searching authors with common names -- you get irrelevant results to sift through. I'm expecting something more precise, like: SUBJECT="American Sign Language -- Dictionaries." AUTHOR="Gordon, Jean M., 1959-" 3) I wish I could request items from other Montana libraries, beyond just my county, in the shared catalog without having to use ILL. Other states I've lived in have courier services set up for sharing resources and I've always found them to be very valuable.

Fix Holds system to show local/county holds count for an item, not statewide count; Fix Libraries drop down menu so that the last choice stays (during continuous searches) instead of reverting to the default; Bring entire state into holds system, instead of forcing use of ILL for everything outside county; consistent cataloging of titles statewide: I've run into circumstances where the library has catalogued some of an author's material differently, so it's unlikely that a user can find the latter in the catalog or on the shelf. An example is compendium of an author's titles may be catalogued completely differently than the individual ones

Finally, respondents who are library staff members were asked to identify if their survey responses reflect their experiences as a back end user or a front end user. As shown in figure 5, 90.3% of respondents (1,156) indicated that this question was not applicable to them. 6.3% of respondents (81) indicated that as a library staff member, their survey responses reflect their experience as a front end user (using the catalog as a patron) while 3.4% of respondents (43) indicated that as a library staff member, their responses reflect their experience as a back end user (using the software for work).

Figure 5. Library staff experiences.



Appendix J: Hotspot impact



Carnegie Library <bigtlib@gmail.com>

Thank You

Pastor Julia Seymour <pastorjuliaseymour@gmail.com>
To: Carnegie Library <bigtlib@gmail.com>

Mon, Nov 23, 2020 at 12:54 PM

Dear Jacque,

I would like to formally thank the Carnegie Public Library in Big Timber for having mobile hotspots available.

I initially checked one out on 1 October to help with a funeral. I used the hotspot to have wifi for my laptop while at the Mountain View Cemetery in Big Timber. The hotspot allowed me to set up a Zoom meeting so that family members across the state and the country were able to view and participate in the funeral. The strength of the signal and the battery life meant that not only were they able to see the service, but that people who were present at the service could talk to those Zoom-ing in afterwards without me being worried about the hotspot dying.

In a difficult turn events for my family, as I prepared for this funeral, my father-in-law died in Virginia. I took the hotspot with us to travel for his service, since my in-laws do not have wifi. Using the hotspot at their house not only made some of the funeral planning easier, but it also helped us find paperwork and phone numbers that were needed for afterward. My children were also able to stay connected with their school work and occasionally have downtime with a movie, which streamed with no problem via the hotspot.

This may not have been what anyone imagined when these tools were purchased, but I want you to know how helpful it was to two grieving families, not only in our local community, but across the country.

Thank you for the foresight and generosity in ordering these hotspots and having them available.

Your grateful patron,

The Reverend Julia Seymour

Big Timber Lutheran Church
cell: 406.931.0196