

**Montana Shared Catalog**  
**Oct 7<sup>th</sup> Membership Meeting – The Commons Community Center**  
**Bozeman, MT**

**Birds of a Feather groups**

Birds groups gathered to discuss question and issues posed at last evening's meeting at Bozeman Public Library. These questions are listed at the end of these minutes.

**9:30-10:00 Welcome –Honore Bray**

Introduction of Exec Committee

Bray thanked Mosbacher for nametags and registration organization. Gratitude to Ken, Mike, Amy, and Melody—they do a great job for the membership. Thanks to Gail Bacon and Terry Dood for arranging this meeting in such a lovely space. Thanks to Kim Crowley for taking minutes. Tracy, Sam and Alex, Commons staff—thank you for your time.

**Welcome to new libraries:**

Ekalaka Public Library; Fallon County; Library, H.A. Malley Memorial—Broadus, Lolo School Library, Manhattan K-8 School Library, Prairie County Library, Stillwater County Library, Whitefish Community Library.

Roll Call

Approval of Spring2011 meeting minutes

**ACTION ITEM:** Vote on meeting minutes

Sonia Gavin moved we accept minutes; Sonia Wood second **MOTION PASSED**

**10:00-10:10** MSC Budget and Operations update – Ken Adams

**BUDGET:**

- All major bills have been paid.
- Almost all revenues collected with \$13,731.79 yet to be received from 12 libraries.
- Extra \$3,164.30 from FY2011 salary savings
- ShowMyPC Help Desk system annual subscription \$326.
- Directors Station upgrades delayed pending RFI/RFP.
- \$73,630.05 current budget balance (mostly salary)
- MSC brought in \$334,844.52 so far this year in revenue

**OPERATIONS:**

- Ebsco Discovery Service (in progress);
- Symphony 3.4.1 upgrade in early 2012;
- ShowMyPC Remote Support and Help Desk in testing—now have an MSC Support Page [http://msl.mt.gov/For Librarians/Montana Shared Catalog/Support/default.asp](http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Support/default.asp)

includes chat page as well; stores transcripts; can look at status of tickets and look back at ticket history; very simple to submit the ticket; will help to keep track of the work staff does to justify expenses of MSC staff

- New training website in conjunction with MSC
- RFI/RFP in progress received 12 responses—committee meets on NOV 2 to review RFIs; MSL staff made it clear that support details will be involved when we get to the RFP
- Hardware: MSL replacing storage area network (SANS) this weekend
- MSC servers have been connected to the UPS and emergency generator
- Request has been made to ITSD to connect network room to generator also
- Training: reports and director's station training coming up in Helena Oct 18 and Billings Nov 16
- New library training in Lolo and Terry, Columbus, Oct 24-26
- Reports Webinars
- Cataloging Guidelines have been updated with simplified and standardized call number analytics; guide for cataloging E-Readers; procedures for periodicals if you don't have the serials module. Thanks to the Content Management Committee for all their hard work!
- Look for new guidelines and TRAINING coming soon from Content Management Committee

**10:10-12:00** Discussion of Questions for MSC Future Planning - Exec Committee

**Jodi Teeple, Lolo Schools Libraries--school libraries.**

- Training for DS for schools
- Small group identity crisis; we have schools and branches—where do we go to get answers? Possible representation for all levels—K-4, 5-8, 9-12, rural vs. urban
- In-house training from school librarians for school librarians. Have that (training) written into contract when schools join the MSC. Pay for subs so librarians can attend training and meetings. Follow-up within 3-4 months of going live. Some sort of check-list would be nice.
- Would ask MSC to approach OPI to share resources (\$) for the school side of MSC.
- Public Relations—hesitant about leaving Sirsi/Dynix because of training issues.  
Marketing: What can we do to prove the MSC is a better option to schools than Follett?

**AREAS OF CONCERN:**

1. Consensus that number 1 concern is training,
2. then adequate tech support at each library
3. cost of membership
4. public relations and marketing
5. delivery of materials

## **Wendy Campbell, Darby Public Library—Small Libraries**

### **1. Three major goals:**

- financial stability
- staff support from MSC
- collective power and collective support

### **2. Challenges:** concerns for us as small libraries with budget limits and minimal staff

1. Participation costs and cost of travel including travel time
2. keeping up with or even moving toward the forefront of technology including using collective buying power for purchasing devices
3. improve general functionality of the catalog for patrons, making it more user-friendly for all

### **3. Rate areas of concern: There was no consensus on rating; each representative has turned in their ratings to Melody Condon**

### **4. Leaner, friendlier interface will include:**

- limiting item types to help standardize search
- showing patron their library information first
- turning off digital books and/or other limiters on first screen
- revising place hold function for place holds option allowed to patron library only unless in a partner sharing group
- call number on first screen
- desire to receive list of 11 item types that Donna shared from Whitehall Library

### **5. How could your group be best divided as it grows?**

We realize a change needs to be made. We would propose guidelines so that existing and new libraries could determine where they fit. We do see guidelines using one single criteria as too limiting and see full time equivalent as an additional guideline for dividing groups. As the current small library group we would like to break off into random groups then come back together and discuss and report. We do see a need for a medium sized public library group; most new libraries entering the MSC fall into the Small Libraries group.

## **Jim Kammerer, Montana State Library—Academic and Special Libraries**

Need to adopt a mascot so adopted the Odd Duck. Group has a healthy self esteem; lots of depth and diversity; lots of original cataloging not duplicated elsewhere. Have a willingness and desire to share our knowledge, resources, and expertise with others. Serve a much larger community than just a handful of users.

## GOALS:

- More customizable user interfaces for special libraries. For the patron and librarians.
- More detailed search results.
- Keep costs affordable.
- Allow libraries to pick and choose their modules. Ala carte model.
- Ease of use for all to search.
- Good tech support.
- None of us are member of a Partners group. Groups are a minority but they seem to have a lot of sway. Perception.
- Need for some business planning and ROI to demonstrate the value of the consortium to take to other communities, to the legislature and other decision makers.
- Need to create a more formalized work plan and process that recognizes our diversity of library types. Create some milestones on the way to the larger goals. Maybe a two year or five year plan.
- The need to hear more about what is going on within the executive committee.
- Need for broader level of marketing
- We are not a part of a Partner sharing group. Some of us don't share or circulate physical items. But all of us do share. We share expertise, knowledge, reference questions, we share our online collections. We share PDFs.
- Want to expand the concept of resource sharing and delivery. More inclusive concept. But we do support resource sharing and delivery. Resource delivery may include mailing and physical, but also PDFs and digital assets.
- Want to see **funding** for all types of resource delivery and sharing. We want to be included in any discussions of resource sharing and delivery. Expand the definition. We share expertise, we share knowledge, and we share our collections.
- Other library types might not be aware that we are available to assist their patrons with reference questions and also share our collection, our digital resources, expertise and knowledge.
- We are all open to telephone calls.
- State wide library card....used the analogy of the fishing license. Gift card at Cabelas works at all stores in Montana. Likewise, one library card ought to work for all libraries.
- Robust software, user support (library staff), training
- More outreach from MSC for the new incoming MSC library personnel. We support an organized mentoring program. New MSC librarians really struggle without documentation from the previous librarian. Brand new librarians don't even know who to call. MSC staff could refer us to mentors.
- In the library directory if there was a way for others to know who the new librarians are in the existing MSC libraries, not just the new libraries.
- Area codes for phone number.

3. Rate the following areas of concern:

Adequate tech support at each library (3)

Training for all personnel (1)

Delivery of materials one library to another (5)  
Cost of membership plus participation activities (1)  
Public relations and marketing at the local and state level (4)

4.

Ability to customize would really help us make the catalog leaner.

Cut down on all the home locations and item types.

Look to the work of other libraries to cut down the clutter.

Be aware of what we do may impact negatively other libraries, everyone, particularly public libraries when there are multi-type libraries on a single record.

When you make a mistake or find a mistake, don't ignore it.

Get help, make others aware of the situation.

5. Not much room to grow much larger. Limited number of special libraries in Montana.  
Probably won't get the universities.

Others see significant potential for growth. We can bring in other special libraries around the state, e.g. law libraries, engineering libraries, medical libraries, small museums around Montana, archives, like Butte archive....if they did not have to buy into all the modules.

What do you want to be beyond the catalog? Potential is tremendous. What if we were to speak as one voice as special libraries? We have the depth, the diversity, and we have the ability and desire to share our uniqueness, but need a good, robust ILS system to show our uniqueness. Unduplicated records, unique content.

## **Elizabeth Jonkel, Missoula Public Library**

### **Three Goals**

- More e-Books via new/different vendors – don't have to transport digital materials! Be sure we act together rather than individually when making digital collection decisions
- Courier service and seamless delivery of materials (ILLs and partner)
- Consistency in practices
- Cooperation and flexibility
- Developing a strategic plan (with the help of an independent consultant)
- Don't go backwards, we've come too far
- Increased membership and participation (more variety in the kinds of libraries joining)
- Uniformity in how we catalogue and in other ways without infringing on each other's individuality
- Staffing: more employees at the State. Perhaps a travelling librarian to assist with cataloguing. Look regionally rather than state-wide, maybe, but act for the benefit of the group as a whole.

As we grow we need to ensure that the new libraries are properly supported as they join. Maybe a dedicated staff person to walk prospective members through the joining process and the expectations (e.g., staff/equipment/training) of members as part of MSC.

- More legislative support: get legislature to look at limited income of some counties and how they've been affected by the recession. Need better funding for projects that benefit libraries. Perhaps pick up some costs of the shared catalogue? Can OPI provide funding?
- Use funds better or spend money better in order to support strategic projects so that it's been used collectively for the benefit of all libraries. For example, pooling money to purchase online databases – go consortial on everything where possible. Make sure investments are used and needed by the public.
- Better public relations and marketing at both the state and local level. Perhaps surveys and user/focus groups to comment on MSC that would result in information that can be presented to the legislature.
- Cross state lines to expand service.
- More access to bandwidth in underserved areas. Assess equipment and access needed from the beginning and ensure new libraries have received consulting from the State to advise on transition to shared catalogue
- State meets with each member once a year to touch base and give input/feedback.
- More training of shared catalogue members' staff (online webinars, perhaps)
- Centralized or regional cataloguing services, either optional or not, depending on library's needs
- Share everything, not just the catalog.
- A state-wide library card – could be used everywhere and be a cost savings by reducing duplicate library card holders. Great for public relations amongst library users.

STRATEGIC PLAN – would incorporate many of the ideas listed above (basic principles, training, staffing, funds, growth, public relations and marketing, and legislative negotiations)

EXPANDING CONSORTIAL RESOURCES (especially digital resources, learning opportunities, and courier project)

SHARING EVERYTHING (knowledge and expertise, materials, customers, guiding principles)

### Three challenges

- Bandwidth
- Finances and stable funding
- Staff
- Reliable help when needed (e.g. more guidelines, clearer data map and instructions on setting properties, cataloguing help, a mentor program, hubbed, regional support groups to help out with cataloguing and other issues)
- Technical support
- Delivering materials from one library to another (replacing or resurrecting the courier program)

**MONEY AND FUNDING** – an issue for all libraries, regardless of size

**ADEQUATE RESOURCES** – staff, bandwidth, time, continuing education, funds

**LOGISTICS OF SHARING** – getting buy-in from all members, physical distances, complexities of a shared resource model, and costs involved

### **Rankings**

1. Adequate tech support
2. Training for all personnel
3. Cost of membership plus participation activities
4. Delivery of materials from one library to another
5. Bandwidth

### **A leaner, more usable catalogue**

- Continue to clean up the catalogue, especially item types. No more new ones. But as we transition to a smaller selection, tackle it in pieces rather than all at once.
- Drop possessive attitudes and fixation on previous, bad experiences. All systems have glitches. Recognize it and move on. Be more cooperative and consistent in practices.
- Home locations another problem area. Be smart about how you use them or create them. Are all your DVDs together in one spot? Then give them one home location of DVDs. The longer the list, the longer the search will take. This will make the system faster and take up less bandwidth in the end.
- Training will improve understanding of things like catalogue mapping and selecting items types, etc. Provide education and explanations from the very beginning about what these things are and why they're important. The State should provide good definitions of what things mean and give advice or suggestions on what is the best practice for a specific library.
- Deadlines to the State on when things we've been talking about for years actually need to be done. For instance, create and distribute definitions of what things mean. Sit down and figure out ways to fix item types issues on specific collections like JD books.
- Look at the patron interface from the aspect of being a patron – what does it look like from the patron's perspective? A leaner, meaner catalogue requires us to be vigilant and pay attention to the patron's experience. If this means we go with OCLC or whatever in the future, then so be it, but we need to focus on the patron and what will benefit them?
- A strategic plan is essential. Took 3 years to get staff funding and hire new staff at the State. A plan would have helped realize this sooner.

**STREAMLINED AND CONSISTENT CATALOGUING** – would reduce cataloguing errors, improve usability and access, and ensure authoritative decision-making, guidance and appropriate usage for the benefit of all members

USER EXPERIENCE PRIORITIZED – assess service from perspective of the user rather than the catalog or State employees

LESS TALK, MORE ACTION – get our ducks in a row and start moving forward, whether under a strategic plan, continued evaluation, major clean-up project, or a new vendor

### **Public Library Sizes**

What does medium mean? Is it volume, circulation, titles, patron numbers? Not very many large libraries right now. But are medium sized libraries under-represented at Executive? A bylaws change would need to be made if the answer is yes. Regardless, every library has one vote, no matter the size. Representation within MSC is pretty good as a whole- it's more relations and self-identity than not having a voice in the MSC. It's probably best to let each library make the decisions for itself whether it is large, medium or small but not have it influence representation within the MSC. Just make sure you have enough room to meet as a group.

Thresholds – maybe best to get a ratio between # of staff and # of transactions to see how busy a library is.

5,000-10,000 titles. Can't afford new projects. = small

10,000-25,000 titles. Might or might not be able to fund new projects. = medium

25,000 + - titles. Probably will chip in funds for new projects. = large

**YES – MEDIUM-SIZED LIBRARIES NEED REPRESENTATION ON EXECUTIVE COMMITTEE, SIZE TO BE DETERMINED BY CIRCULATION**

### **Bray wrapped up the discussion and invited comments from the membership:**

Legislative Committee needed to work together with MLA. Interested parties should email Ken Adams. Bill Cochran concerned that we don't have a strategic plan. Donna Worth: could there be an interesting PowerPoint presentation put together that we could all use to demonstrate the value of the MSC? McHugh summarized what she heard: Strategic Plan, Ala Carte, delivery of materials needs to include more than physical materials? Crowley mentioned that the large public library group would hope to hire an outside consultant to direct the strategic plan. Condron mentioned more training and liked the idea of peer training. Marchwick asked for training ideas. Staff will be working on online training packages. Heard the schools loud and clear that they want school-specific training and they are on it. Marilyn Richie commented on the fact that travel is expensive and wondered if we could have meetings where we didn't have to travel. Sonia Woods likes the idea of two meetings. Beth Chestnut thanked everyone for letting schools be part of this group; at the core our needs are all the same, though we each have our special needs. Kari Eliason is there a way to combine meetings--with Fall workshops, with MLA, with other workshops? Carly suggested skype-ing in those who couldn't attend; it

worked well for a meeting she attended for State Aid task force. Kate Vasser Geise, Sun River Schools, would second the idea of taping the meetings; her travel budget is shot with this meeting and the Fall workshops. McHugh suggested we look at other large consortiums. Challenge is to keep everyone in the communication loop. Sonia Gavin suggested conference calls with smaller groups once a year; then once a year with larger group. Hesper has lived in the limiting funding world for a long time; governing bodies find the money for what they think is important. Somehow part of our obligation is to keep these governing bodies informed as to how important the MSC is to our communities. Need to stay vigilant in keeping those people aware that you are a member of something important and you need the money to be a valuable member. Kate Lewis Carnegie Public Library: Good idea to combine fall workshops. Joann Erdall loves this face to face meeting. Most librarians are introverts; networking is very important. It's our job to bring info back to boards, commissions, and councils. Dawn Kingstad try something new. We would have to change the by-laws. Robbins: training could be web-exed but have one day in person meeting. Becky suggested more MSC training at fall workshops with the meeting on the last day. Adams talked about by-laws changes needed. Trainings the day before the meeting are not in the by-laws; these could be one-day meetings without training. Training could happen elsewhere or online. Attendance requirement is in the signed contract. Deb Joliet, can we change by-laws to say Fall instead of October. What would it take? Petition Exec Cmt members to change the by-laws and the exec committee would bring it up at a meeting. Exec has three face-to-face meetings. Hesper said that the "medium public library group" formation and representative on the Exec Committee would also have to go through the exec committee. Would we still need at-large representatives? All by-laws are online.

**12:00- 1:00** Lunch and Networking

**1:00 - 2:15** Presentation: Statewide Integrated Discovery System and the MSC  
Kathy Kiely – EBSCO Implementation Specialist

**2:00-3:00** Espresso and Snack Bar is open

**2:15:2:30** Break

**2:30-3:15** Statewide Integrated Discovery System; Questions and Answers  
Kathy Kiely, Sarah McHugh and Mike Price

Montana Shared Catalog, Montana Memory Project, Statewide Databases are the 4 things being searched. Find a Montana Library goes out to the MT Library Directory. HomeworkMT is another link that takes users to Tutor.com. Working on how to add MTLib2Go to libraries that are members of that service. All libraries have individual EbscoAdmin accounts; can customize

EDS to your library. Sarah will work with Ebsco to see how to configure Partner groups or library groups that have Main Library and branches. This is another option to e-Library. Users could start here or could start at e-Library. Variety of options. Mike Price demonstrated the possibilities of this interface by showing the University of North Carolina, Greensboro <http://library.uncg.edu/>

Kathy Keily offered to do an online session on customizing the Ebsco interface as well as the EbscoAdmin module. Ebsco support site has many webinars available. Adams asked: Where are the data servers located? Two sites 40 minutes north of Boston; each have about 100 servers in them. Also an emergency site far removed from Boston. Text to speech is only available for html documents in Biography and Literary Reference Center (for instance). Will usage statistics be individual to each library? There are some unique things in generating stats in Ebsco Discovery vs. Ebsco Host.

Sarah thanked Ebsco staff for working so well with the Montana State Library and special thanks to Mike Price for all the work he has put in on this project.

**3:15-3:30** Public Comments, Wrap up and adjourn

Ken thanked everyone for coming and the meeting was adjourned at 3:26 pm

**Next meeting: Lewistown – Yogo Inn – May 3-4, 2012**

**Discussion Questions:**

- 1) What are three (3) goals or issues which you think are essential to a strong, viable consortium of libraries which make up the Montana Shared Catalog?
- 2) What are three (3) challenges (concerns) which you think must be met and/or solved in order for the group to go forward effectively?
- 3) Rate the following areas of concern from 1 (most important) to 5 (least important) related to your library's or library system's active participation in the consortium (and be prepared to justify your ratings):
  - \_\_\_\_\_ adequate technical support at each library
  - \_\_\_\_\_ training for all personnel
  - \_\_\_\_\_ delivery of materials from one library to another
  - \_\_\_\_\_ cost of membership plus participation activities
  - \_\_\_\_\_ public relations and marketing at the local and state level
- 4) What can your library and group of libraries do to facilitate a "leaner" and more usable catalog and patron interface?
- 5) Within your "Birds of a Feather" group, please consider the following:

a) Academic and Special Libraries: How can you encourage growth of your groups? What special needs of your libraries need to be addressed for a more effective use of the shared catalog and consortium?

b) School Libraries: As your group grows, how could it be divided to give you more effective representation on the Executive Board and more issues in common for breakout group meetings? As a whole, what special needs of your libraries need to be addressed for a more effective use of the shared catalog and consortium?

c) Public Libraries: Is there a need for a Medium Public Library group, and if so, how would Small, Medium, and Large be determined? As a whole, what special needs of your libraries need to be addressed for a more effective use of the shared catalog and consortium?