

CMS

Communication and Management Services, LLC



LSTA in Montana

An Analysis of the Impact of the Library Services and Technology Act on Community Libraries, State Library Resources, and Library Patrons

Prepared by CMS at the request of the Montana State Library

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I. Evaluation Summary

A. Overview and Key Questions

This summary addresses the empirical data, qualitative analysis, and individual librarian and patron experiences of services funded through the Library Services and Technology Act (LSTA) administered by the Montana State Library (MSL). Also included are the major questions addressed in the evaluation, a description of methods, key findings, and recommendations.

In developing the methodology for LSTA analysis, the research team began with a core question: Are Montana library patrons getting the information they need when they visit their library? (With a library visit herein defined as any and all library resources and tools accessed through a physical library, online, or through the distribution of said materials by U.S. mail or other means). Using the diverse sample group of library patrons presents challenges in the analysis of a particular federal funding source administered at the state level. A patron with a particular need, not one visiting simply to browse or have more of a general library experience, still has little interest in the organizational components of

Are Montana library patrons getting the information they need?

library funding streams that will provide the desired information. Yet the library patron remains the ultimate consumer or customer of these programs and thus must remain the pinnacle unit to measure the usefulness and impact of LSTA services, tools, and programs. It is also posited by the research team that librarians and library staff (separate from MSL personnel) are by definition informed surrogates able to speak for library patrons through their

daily role of front line assistance in research, data mining, and contextual analysis. The development of all questions in each part of survey and outreach methodology thus stems from asking this core question with a focus on the LSTA role.

Correlating questions adhere to the needs assessment addressed in the MSL's LSTA Five Year Plan approved by the Institute of Museum and Library Services (IMLS). They are as follows:

- Are Montanans receiving convenient, high-quality, and cost-effective access to relevant content to meet their information needs?
- Is MSL providing leadership, training, and consultation to Montana's community libraries to help them reach their goals?
- Is Montana's network of libraries forming partnerships and working in collaboration to meet the needs of their individual and shared patrons?
- Are Montanans with visual, physical, or reading disabilities getting the information they need in specialized formats using specialized equipment?

All survey, interview, and focus group questions are included in Section III, Part D/E, and explored in greater detail in Section II, Part C, of this report.

Analytical components of this report contain federal data series and related relevant research to provide a state and national context for how librarians and library staff are using LSTA tools and services within the specific demographics of their local communities. Montana remains a sparsely populated state with great distances between both larger cities and smaller communities. While Montana's population recently hit the one million mark, there are three counties currently well below one thousand residents (even as each county is equal to or significantly larger in square miles than the State of Rhode Island and its one million citizens!).¹ Relationships between local organizations are thus critical, as a library may be identified with a particular local political jurisdiction, yet fulfills its role as a *community anchor institution* for a much broader regional community.²

Additional demographic considerations include median age by geography, American Indian population and the presence of seven federally recognized Reservations and Associated Tribes, economic and related business data, and population migration.

B. Description of Research Methods

The research team devised the following methods to produce the evidence deemed necessary to answer the aforementioned questions. Each component was considered in tandem so that individual research tools augment one another and provide a more complete context to the collective information.

Librarian Survey: This survey was made available to libraries across the state and addressed operational questions stemming from the four MSL and LSTA questions listed above, as well as the overarching question relating to core patron needs.

Patron Survey: Similar to the Librarian Survey, this asked direct questions of patrons regarding what tools and services they use and the usefulness of these tools and services.

Patron Interviews (Talking Book Library): Researchers interviewed patrons of this program to ascertain the impact on their lives and their assessment of the program in general, staff, quality, and necessity of the Talking Book Library.

Focus Groups: The research team conducted three focus groups in libraries across Montana to address each LSTA-funded program or tool and record librarian and patron comments on the use and effectiveness of each one.

Social Media: The research team set up a social media webpage for patrons and librarians to leave comments and make suggestions (designed to assist those who could not attend the focus groups).

Supplemental Surveys: The research team also received supplemental surveys on the Montana Shared Catalog, MontanaLibrary2Go, and the Montana Memory Project.

¹ U.S. Census Bureau, Population Division, 2010 Intercensal Estimates.

² Community Anchor Institutions are defined as schools, libraries, medical and healthcare providers, public safety entities, community colleges and other institutions of higher education, and other community support organizations and agencies that provide outreach, access, equipment, and support services to facilitate greater use of broadband service by vulnerable populations, including low-income, the unemployed, and the aged. National Telecommunications and Information Administration, Broadband Technology Opportunities Program (January 2010).

C. Key Findings

The findings based upon the above questions, although diverse, reach the ultimate conclusion that LSTA funds are critical to providing information in a variety of formats to the patrons of MSL, other state libraries and the agencies they serve, and school and community libraries. These key findings are intended for illustrative purposes in the interest of brevity; Section II of this report provides greater analytical content, and full data and responses are listed in Section III. This summary information is listed as follows in direct correlation to the IMLS Congressional Purposes referenced in the MSL's LSTA Five Year Plan:

LSTA Purpose: Developing library services that provide all users access to information through local, state, regional, national, and international electronic networks and targeting library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line.

- ✓ Over 86% of librarian survey respondents view the Montana Shared Catalog (MSC), an electronic and staff oriented shared automation system involving more than 140 libraries, as *important*, with over 60% of the survey group listing the MSC as *very important* or *essential*. The State Library Commission authorized the use of LSTA funds to help libraries cover the vendor startup costs associated with joining the Montana Shared Catalog.
- ✓ Fully 98% of library patrons surveyed said the online resources at their library are *convenient*; 92% said they *always* or *frequently* had their information needs met.
- ✓ Montana faces challenges reaching underserved populations in rural communities. While there are various federal definitions of a rural area, using the Census Bureau's land-use definition (outside urban areas of 2,500 or more people) 100 of Montana's 129 incorporated cities or towns are rural (77.5%).³ Using the definition of economically based non-metro areas (outside metro areas of 50,000 or more) places an almost identical 77% of all Montanans living in a rural setting.⁴
- ✓ Montana's poverty rate of 14.5% is above the national rate of 13.8% (19.2% of children in Montana live below the poverty line).⁵ In many rural Montana counties, poverty is greatly increased to as many as one in four residents (libraries in these counties were among the focus group participants). Survey comments from patrons included both economic and poverty concerns: "We are a very low income family and really like the fact that the library provides programming that is free for us to attend." "I save money by borrowing instead of buying...I would never be able to buy everything I read!"

³ U.S. Census Bureau, 2010 Decennial Census Summary File 1.

⁴ U.S. Department of Agriculture, Economic Research Service: Cromartie, Bucholtz et al. *Defining the "Rural" in Rural America* (June 2008); U.S. Census Bureau, 2010 Decennial Census Summary File 1.

⁵ U.S. Census Bureau, American Community Survey Profile Report 2006-2010.

LSTA Purpose: Expanding services for learning and access to information and educational resources in a variety of formats, in all types of libraries, for individuals of all ages.

- ✓ Over 82% of librarian survey respondents view the consulting services provided by MSL as *useful* to their libraries, with 59% rating this consulting as *very* or *extremely* useful (less than 1% responded *not useful*).
- ✓ Over 83% of librarian survey respondents list these consulting services as *somewhat essential* or *essential* (less than 1% responded *not essential*). Those respondents who were undecided or do not use the consulting services were at the 15% to 16% range, showing the possibility for outreach to this population.
- ✓ Approximately 94% of librarian survey respondents view the training provided by the MSL as *useful* (68% rating it *very* or *extremely* useful). Not one respondent chose the *not useful* response option; over 90% of this group views the training as *somewhat essential* or *essential*.
- ✓ Exactly 80% of survey respondents for the Montana Shared Catalog view it as improving services at their library. Over 75% of survey respondents for MontanaLibrary2Go (downloadable books) view it as improving services at their library. For the Montana Memory Project, although a smaller survey group, approximately 86% rate this LSTA-funded project as improving services at their library.

LSTA Purpose: Providing electronic and other linkages among and between all types of libraries and developing public and private partnerships with other agencies and community-based organizations.

- ✓ In addition to the data regarding the Montana Shared Catalog (MSC) listed in the first LSTA Purpose, respondents to this product survey rated either *excellent* or *satisfactory* for the catalog's access (93.1%), reliability (86.9%), convenience (86.2%), user friendliness (70.4%), and ultimate ability to meet their information needs (77.2%).
- ✓ In the librarian survey (for those participating in MSC), over 86% recognize the important of this connection between libraries for the patrons they serve, with 41.3% rating it as *essential*, 20.2% rating it as *very important*, 12.8% rating it as *important*, and 11.9% rating it as *somewhat important*.
- ✓ A survey of MontanaLibrary2Go shows that over 80% of respondents use downloadable e-books at their library, and a little more than half use downloadable audiobooks.

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

- ✓ The Montana Talking Book Library Program (TBL) reaches patrons with a wide variety of challenges to visual reading across a large diverse geography. A survey of these patrons rated

the TBL service providers as having *excellent* knowledge (82%), *excellent* prompt handling of technical equipment (82%), and a 100% *excellent* rating of professional staff courtesy.

- ✓ Participants in each focus group also made the point that audio book materials, such as those provided by MontanaLibrary2Go, assist adults with certain limited functional literacy. Over 61% of librarian survey respondents said they use the Ready2Read programming in their library, and each focus group session cited this as literacy promotion for emerging readers. Homework.MT, an online tutorial service, also plays a role in this area. Montana's percentage of the population lacking basic prose literacy skills stands at 9%.⁶ While this is below the national rate, some rural Montana counties, and those with the largest percentage of American Indian population, see higher rates. (Some of these counties were represented by focus group participants.)

D. Key Recommendations

- ❖ MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services in those areas where survey data shows evidence of the product and service improving library services;
- ❖ MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services;
- ❖ MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries;
- ❖ The Talking Book Library patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems beyond cassette and digital materials, yet MSL should maintain access to all formats through archived materials; and
- ❖ MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago.

⁶Those lacking *Basic* prose literacy skills include those who scored *Below Basic* in prose and those who could not be tested due to language barriers. National Center for Education Statistics, State and County Estimates of Low Literacy (2003).

II. Body of the Evaluation Report

A. Background of the Study

This study and the aggregate analysis contained within this report were conducted on behalf of the Montana State Library on the use of LSTA funding for the years 2008 to 2011. The Library Services and Technology Act of 1996 is the successor of the Library Services Act of 1956 enacted to provide innovations and improvements to libraries across the country. The subsequent legislation has a renewed focus on the opportunities and challenges new technologies present state and local libraries, specifically with issues related to access. LSTA sets out three overall purposes:

- Promote improvements in library services in all types of libraries in order to better serve the people of the United States;
- Facilitate access to resources in all types of libraries for the purpose of cultivating an educated and informed citizenry; and
- Encourage resource sharing among all types of libraries for the purpose of achieving economical and efficient delivery of library services to the public.⁷

This report is intended to be used by a wide variety of librarian professionals, policy makers, federal and state officials, and any member of the public who has an interest in learning about and providing input to Montana State Library officials with regard to the use of these funds in local communities. While the size of this report precludes an analysis of all potential cross referencing of data, this information is included in aggregate and may be used by the aforementioned group of stakeholders for a variety of analytical purposes. For this report, the intended use of the analysis is to determine the impact of LSTA funds on libraries and their patrons. To this end, outreach focused on a geographical and organizational balance; the research team understands that libraries across Montana differ greatly with respect to staff size, training of library staff, and fiscal resources.

The qualitative research questions for this analysis stem from the needs assessment addressed in the MSL's LSTA Five Year Plan, and the LSTA Congressional Purposes published by the Institute of Museum and Library Services.

As was mentioned in the Evaluation Summary (Section I), the research methodology queried whether these needs are being addressed. Correlating questions were further distilled to form the core question of the study: Are Montana library patrons getting the information they need when they visit their library? The specific use of LSTA funds requires defining a library by its services and not its physical location. In Montana, this has increased significance given the long distances programs like the Talking Book Library must reach out to in order for it to be a statewide system.

⁷ Institute of Museum and Library Services: *A Catalyst for Change: LSTA Grants to States Program Activities and the Transformation of Library Services to the Public* (June 2009).

Democratization of Information

“Say, a young girl on a reservation in Montana who will grow up to find a cure for cancer; a young boy in one of the nation’s great cities who will go on to create a nanotechnology that will change the world. Might not the lack of the best educational resources negatively impact their achievements? The girl will grow up to be a doctor of much note and the boy no doubt a success because they are talented people who will work hard for themselves, their families, and their communities, yet the impact to all of humanity could have been so much more had we matched their genius with the proper investment of opportunity.”

-The Montana Approach

The values and principles guiding this evaluation process can be seen in key questions and the choice to develop all materials from the building block of the library patron. Administering statewide programs to diverse geographical areas requires state agencies to take additional measures and face greater per capita program expenses to ensure each Montana resident has equal access (just as federal operations in remote Montana face the same fiscal pressures). Yet the authority of the state (or nation) to operate rests with the populace, and so any additional effort or cost must be borne by the assigned agency. In the case of the Montana State Library, this task is wedded to an ethos of equality and access that libraries provide to the public.

Since many of the LSTA services are accessed via the web, it is worth introducing the concept embraced by all of Montana State Government in developing expanded broadband access: *the democratization of information*. In a recent report from the Montana Department of Commerce on broadband access, this is described in terms of national strength, i.e., what might the country lose if someone of extraordinary intellectual capacity is born to an underserved rural (or urban) area and is not able to access the very types of resources included in this evaluation?⁸

For most of us, our achievements will be perhaps less lofty, but the idea of maximizing individual human capacity through access to the information we need is no less important to our endeavors.

B. Description of Methodology

The research team devised the following methods to produce the evidence deemed necessary to answer the aforementioned questions. Each component was considered in tandem so that individual research tools augment one another and provide a more complete context to the collective information.

Librarian Survey: This survey was made available to libraries across the state and addressed operational questions stemming from the four MSL and LSTA questions listed above, as well as the overarching question relating to core patron needs. There were 139 librarian survey participants; their identity remains anonymous to the research team.

⁸ Montana Department of Commerce, *The Montana Approach* (2009)

Patron Survey: Similar to the Librarian Survey, this asked direct questions of patrons regarding what tools and services they use and the usefulness of these tools and services. There were 49 patron survey participants; their identity is anonymous to the research team.

Patron Interviews (Talking Book Library): Researchers interviewed patrons of this program to ascertain the impact on their lives and their assessment of the program in general, staff, quality, and necessity of the Talking Book Library. Thirty-three randomly selected individuals participated in this process; their names are being kept confidential except in cases where expressed permission was granted.

Focus Groups: The research team conducted three focus groups in libraries across Montana to address each LSTA-funded program or tool and record librarian and patron comments on the use and effectiveness of each one. Focus groups were held in Billings (with representatives from three other surrounding counties); Helena (with representatives from one additional county); and Missoula (with representatives from one additional county). The list of attending libraries is included in Section III Part B; there were 34 attendees at these sessions.

Social Media: The research team set up a social media webpage for patrons and librarians to leave comments and make suggestions (designed to assist those who could not attend the focus groups). Several community libraries across the state joined in supporting the project.

Supplemental Surveys: The research team also received supplemental surveys on the Montana Shared Catalog (158 respondents), Talking Book Library (61 respondents), MontanaLibrary2Go (181 respondents), and the Montana Memory Project (21 respondents).

The strength of the survey methodology is that it provides anonymity and convenience for survey respondents. Even as such, most of the target librarians for the survey maintain front-line patron assistance duties and thus must find time to complete a survey intended to take about 15-20 minutes for a thoughtful response. Focus groups require significantly more effort to attend, and the research team is pleased to report that library directors, librarians, and library staff drove round-trips of more than 200 miles in some case to participate in focus groups.

All data sources are federal unless otherwise sourced. Data from the American Community Survey is for the geography of Montana.

The project stakeholders and intended users of the information participated in this evaluation in various ways. Background information from the MSL was used to develop survey materials; community librarians were involved in focus group development. For the focus group sessions, the format allowed free discussions on each LSTA-funded area. The research team recorded comments

on a projected screen in real time so that the participants could review their own comments and make corrections in cases of mistyped statements, acronyms, etc. This provided for a detailed summary of the focus groups for use in the development of this report.

The librarian survey has an estimated sample size of 700 for a return rate of advertised surveys of 20%. The survey size of the patron survey, given the potential size of patrons (i.e., essentially the general public), is problematic. The outreach effort had a value in and of itself, and the survey responses were overwhelmingly trended in one direction and are included here as evidence of patron feedback on these services. It is also posited that those individual patrons motivated to take time out to complete a survey are among a populace well acquainted with these library services.

No members of the research team's ownership, staff, or associates are employed by the Montana State Library or any of the agencies surveyed as a part of this evaluation, or otherwise have a conflict of interest with any of the surveyed agencies. No members of the research team's ownership, staff, or associates participated in any of the survey materials or have a conflict of interest or maintain a business relationship with any of the focus group participants. All confidential materials will be kept in a secure manner for an appropriate period of time following the completion of the study. Survey systems provided for anonymity of survey participants (except in cases of a respondent choosing to identify themselves either directly or through vital information). All focus group participants were given equal opportunity to participate, and opinions offered were given no weighted value or censorship by the research team in the role of facilitators. All participants were given an evaluation document to anonymously rate the sessions and role of the facilitators.

C. Evaluation Findings

The methodology produced an evaluation demonstrating overwhelming support for the continued use of LSTA funds in a variety of areas. While survey respondents and focus group participants had preferences among specific tools and services, there was consensus that the MSL provides a balance for the use of these funds between and among libraries with vastly different size and scope of mission. The evaluation findings are listed where appropriate to answer the three sets of questions laid out in the evaluation plan: retrospective, process, and prospective/outcome.

Retrospective Questions

How did the LSTA grant program benefit targeted individuals and groups?

The clearest example of the targeted use of LSTA grant funds in Montana is the Talking Book Library program (TBL). A historic program within the state, it provides audio library materials, downloadable Braille, magazines, and related materials. Staff and volunteers at the TBL interact with individuals in the program and send additional materials via the U.S. Postal Service. It

should be noted that the relationship between TBL staff and program participants maintain the culture of a professional staff to a client. In interviews with TBL patrons, they repeatedly mentioned their personal relationship with staff and how they make recommendations for books and assist in patrons' interests.

The amalgamation of the patrons that arose from these interviews reveals a lifelong reader faced at some point with a disability that took this important routine away from them. TBL patron Barbara Reavely (now in her ninth decade as a passionate reader!) summed up the experience in perhaps the most illustrative and humorous way. "When I was no more than five years old my father took out an insurance policy for my little sister and me, and as the form prompted him to list our occupations he wrote for me 'reader of books...' and for my little sister, 'beggar of pennies,'" Reavely said. Many others spoke of mild to severe depression prior to joining the program as a result of the adjustment to a lack of reading and much needed intellectual stimulus on top of their other health problems. "The talking book program was just a lifesaver for me," is typical of comments from the interview transcripts.

91% of Talking Book Library patrons rated the program as either very valuable or essential

The demographics of this group clearly skew towards an aging population (the average age of the interview participants was over 70), and octogenarians and nonagenarians were very much included in the survey sample. Many of the individuals who chose *very valuable* wanted the interviewer to know that they anticipated changes in their personal health status that would make the program increasingly more essential for them over time.

While the sheer volume of commentary from patrons is too great to list here, other cogent comments include those that said book clubs in an assisted living setting are a social outlet important for a healthy mental and physical lifestyle; grandparents who said they are able to mentor this next generation in reading because "it is one thing to tell a young person to read but there is no substitute for leading by example;" and the many patrons who appreciate the Montana-based books on history subjects such as the homestead era given their own personal history with the state.

I grew up on the Rocky Boy Indian Reservation. At the time I got on the program I was very depressed because I read real fast and to use the magnifying glass is too frustrating. I am a lifelong reader...my father could read and write Cree but not English, but he and my grandfather loved languages and this impacted me...they had to know how to speak Cree, Chippewa, French, English and even a little German.
-Roberta Saddler

MontanaLibrary2Go, a resource of downloadable books, has an audio component, and librarians cited both audio books and downloadable e-reading materials as increasingly popular with an aging population. Librarians also caution to avoid the trap of thinking that e-reading books are solely, or even predominantly, the domain of the younger generations. Their experience reveals individuals over age 50 enthusiastically using e-readers due to their ability to adjust text size and read without the frustration they had previously experienced due to reduced eye sight. These hands-on librarians see baby boomers transitioning into needing greater reading assistance in the next decades. Data confirm this, as the median age for Montana is 39.7, contrasted with 36.9 nationally (and with many of the rural counties this increases greatly).⁹ They also recognize that there is a generational component to an individual's comfort level (and access) to the format of materials, and that access to all formats through archives will remain important.

How did the LSTA grant program benefit library patrons and the public in general?

This question speaks to the core constituency of this evaluation, whether library patrons' information needs are being met, with 92% of patron respondents affirming this experience at their local library. Further data illustrate respondents who are very aware of many of the LSTA-funded tools and services, even if they might not have heard of the enabling legislation. The following chart details how patrons favorably rate the following services that are either completely associated with LSTA, or in partnership with LSTA programs, with the vast majority of respondents rating them as *somewhat useful* or *very useful*.

2012 Montana Library Patron Survey

	Very Useful	Somewhat Useful	Not Useful
Your library's online library catalog	80.9%	12.8%	6.4%
Downloadable e-books (MontanaLibrary2Go)	72.3%	17.0%	10.6%
Downloadable audiobooks (MontanaLibrary2Go)	68.1%	23.4%	8.5%
Online magazine articles	51.1%	40.4%	8.5%
Online newspaper articles	51.1%	36.2%	12.8%
Online auto or small engine repair information	53.2%	21.3%	25.5%
Online genealogical resources (HeritageQuest)	46.8%	31.9%	21.3%
Online homework/tutor assistance (Homework.MT)	46.8%	34.0%	19.1%
Online Montana cultural and historical resources (Montana Memory Project)	42.6%	38.3%	19.1%
Online employment and social service information	61.7%	21.3%	17.0%
Online Montana Hunting or Fishing Companion information	44.7%	29.8%	25.5%

⁹ U.S. Census Bureau, American Community Survey Profile Report 2006-2010.

The patron survey also shows room for expansion regarding the use of LSTA-funded programs. While today's library patrons seem well versed and comfortable with the online library catalog, as the chart below shows, other more specialized services were not as well known by patron survey respondents. The numbers for the MontanaLibrary2Go stand out as better known (and used) by patrons (a separate survey of this product shows over 80% of respondents using MontanaLibrary2Go). Librarians during focus group sessions said there was a direct correlation to the holiday season as patrons received electronic readers. The number of patrons unaware of the Online Montana Hunting or Fishing Companion raises a similar question, given the large number of Montanans who chose one or both activities for recreation. A recent report put the numbers of Montana residents at 291,000 for fishing, 197,000 for hunting, and 755,000 for related wildlife focused recreation, essentially capturing the whole state.¹⁰ Librarian comments regarding usage rates for this tool are included in a subsequent question.

Focus group participants also provided some perspectives on the numbers regarding Homework.MT, commenting that this program is becoming better known at a rapid pace. One popular use is professional-level editing for student papers as they are written.

2012 Montana Library Patron Survey

Please tell us about your use of these electronic resources available at your library.

	% Unaware
Your library's online library catalog	2.1%
Downloadable e-books (MontanaLibrary2Go)	12.8%
Downloadable audiobooks (MontanaLibrary2Go)	12.8%
Online magazine articles	31.9%
Online newspaper articles	31.9%
Online auto or small engine repair information	36.2%
Online genealogical resources (HeritageQuest)	40.4%
Online homework/tutor assistance (Homework.MT)	29.8%
Online Montana cultural and historical resources (Montana Memory Project)	51.1%
Online employment and social service information	34.0%
Online Montana Hunting or Fishing Companion information	46.8%

¹⁰ U.S. Fish and Wildlife Services, National Survey of Fishing, Hunting, and Wildlife Related Recreation (2006).

Behind the data, the research team received many passionate and positive comments with regard to the impact of their library on their community. While too numerous to include here, the following statements from patrons, librarians, and trustees and board members are illustrative:

“It has increased the literacy in our community.”

“A highlight of our library is its Ready2Read and summer reading program. Parents actively participate themselves or by bringing their children. Each of these programs rely on resources provided by MSL (LSTA).”

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

“Wherever they have introduced Homework.MT, the resources and tutors have been very well-received. Kids are so excited about it, they are telling their friends...”

“I really value EBSCO because of its value researching and writing papers for students.”

“Auto repair information is great! This is an awesome resource used by my family frequently (esp. on late night car projects).”

“The library provides my family with almost unlimited access to books, movies, music and lots of information unrelated to entertainment. There are always community events at my library such as outdoor concerts and art exhibits. We love to go to these!”

“I love being able to access the library online, so I am not using gas to get there.”

“For public library patrons, medical information is critical. They research Google and get inaccurate information, so the databases are critical.”

“I use the library all the time and will use the book2go even more since I got an e-reader for Christmas.”

“I use the library weekly, mainly for books and online resources. As a [sic] work from home, these resources are important for my job, as well as my own growth and entertainment.”

“I always feel incredibly rich when I’m in the library.”

Did the LSTA grant program achieve cost savings for libraries and their patrons?

The issue of funding sources and costs to local libraries was a subject broached at each focus group. While it is difficult for any one individual working in an organization like a library to have complete information on all budgetary matters (save for directors, finance officers in large libraries, etc.), the groups were well informed on such issues as LSTA monies being used as seed funds for programs funded by the Montana Legislature at the state level. As an example, the electronic databases are funded by the State, but LSTA funds are used at the state level to coordinate the effort. The position taken during discussions was that were it not for this present arrangement, costs would be borne at the local level, which for many local libraries would mean it would not be available to their patrons. In the library patron survey, comments related to families of lower economic status, and others who achieve savings in their household budgets through accessing the tools, services, and programming available at their local library, all funded through LSTA.

The greatest number of comments concerning cost savings to local libraries came from the librarian survey and focus groups regarding the Montana Shared Catalog. Librarians said as one example that they will get a request for a journal perhaps once or twice a year that they are able to provide through their membership in MSC, whereas to purchase that journal for such a small percentage of their patrons might represent 20% to 30% of their total acquisitions budget.

Librarians are seeing programming with LSTA funding supported by patrons, all of which provides a cost free family-based activity. Over 68% of librarians rate the Ready2Read Program as *very valuable* or *essential*; 76% rate the program coordination provided for summer reading programs as *very valuable* or *essential*.

MSL consulting provides high value professional services in a variety of areas at no cost to local libraries. MSL training was singled out as a large cost-saver for local libraries, specifically webinars that allow library staff to access as their professional schedule allows. “If it weren’t for webinars, some people would not get a primary level of training. Not all libraries have the capacity to pay for training and travel.”

What unique services and programs not available elsewhere were made available through Montana's LSTA grant program?

Almost all of the LSTA-funded activities are described by librarians as new tools in the box for them to do their daily job. As the following chart details, these tools are valued, with a clear majority in almost every category rating them in a positive choice option. While some of these

tools and services might possibly be funded at a state and local level, and in some cases LSTA funding is used as seed money for state appropriations, in reality very few of these services would be available without Montana's LSTA grant program.

2012 Montana Librarian Survey

	No Value	Limited Value	Valuable	Very Valuable	Essential
Statewide online periodical databases (InfoTrac, then Ebsco)	1.0%	5.7%	21.9%	22.9%	48.6%
OCLC (e.g., WorldCat, FirstSearch, ILL, Connexion/CatExpress)	0.0%	5.7%	15.2	14.3%	64.8%
Montana Memory Project (digital cultural heritage collections)	2.9%	8.6%	40.0%	34.3%	14.3%
MontanaLibrary2Go (downloadable audio and e-books)	0.0%	2.9%	9.5%	41.0%	46.7%
Heritage Quest (genealogy database)	1.9%	15.2%	37.1%	35.2%	10.5%
Automotive or Small Engine Repair Reference Centers	1.0%	8.6%	21.9%	45.7%	22.9%
CINAHL (nursing resources database)	3.8%	24.8%	35.2%	21.9%	14.3%
Environment Complete (environment resources database)	3.8%	23.8%	38.1%	23.8%	10.5%
Montana Hunting or Fishing Companion	0.0%	19.0%	46.7%	27.6%	6.7%
Homework.MT (online live tutor resource)	1.9%	9.5%	28.6%	32.4%	27.6%
Montana Library Directory	0.0%	9.5%	26.7%	24.8%	39.0%
Montana Courier Pilot (materials moved between libraries by a courier service)	6.7%	17.1%	28.6%	22.9%	24.8%

It is also important to note in looking at the aggregate numbers that individual specialized systems, such as the CINAHL database, might be used very infrequently at a certain library, but focus group discussions pointed out how vital they are at community colleges that are seeing a large percentage of their students pursuing nursing careers.

Behind the numbers, we also find the impact of LSTA in local communities. In Ravalli County, the Bitterroot Valley town of Darby and its 720 residents provides an illustrative example. The demographics of this part of Montana are so unique that Ravalli County was featured as the centerpiece of the book *Collapse* by Pulitzer Prize winning author Jared Diamond, an analysis of how societies throughout history have handled rapid change in community structure. While the incorporated town of Darby is certainly small by national standards, Diamond's book details just

how much change is happening throughout the larger area. “Montana in general, and the Bitterroot Valley in its southeast, are a land of paradoxes. Ravalli County in which the Valley is located is so beautiful and attracts so many immigrants from elsewhere in the U.S. (including even from elsewhere in Montana) that it is one of our nation’s fastest growing counties, yet 70% of its own high school graduates leave the valley, and most of those leave Montana,” he writes.¹¹

“They provided a big scanning machine, and we are entering data as quickly as we can. We have an immense amount of local history, and when this opportunity came up you bet we jumped on it.”

-Ron Birkle

Ron Birkle, a trustee at the Darby Community Public Library, explained how they are using the Montana Memory Project, an online source to collections dealing with the state’s cultural history, to try to combat some of the growing pains mentioned in the book. They have initiated a project called “the Darby Diaries,” a multifaceted effort to digitize the unique cultural and historical components of not only Darby but the Bitterroot in general. Those involved with the project understand that in many ways, such as with oral histories, they are operating very much against the clock. This project, which is receiving widespread community support, would not have been available without this LSTA-funded resource. The benefit extends beyond the Darby library and its patrons, as anyone with an interest will now be able to gain access, including future authors and historians.

Was the cost of the ongoing statewide grant programs justified by the benefits these programs brought to library patrons?

LSTA funds are distributed by population, with Montana’s allotment standing at \$1,108,783 for 2011. This translates to a total investment per year of \$1.10 for every resident of Montana. The general population is used in this analysis as any individual is a potential library patron; as well as the potential impact of library services that a citizen may not even realize (a teacher using LSTA services for lesson planning, a business expanding in a local community based upon a business plan that used LSTA tools, etc). It is estimated that 4,528,004 people visited public libraries in Montana during this same time period.¹² Given the documented support of the immediately preceding retrospective questions, this translates to an investment of less than .25 cents per library visitor. Montana’s thriving tourism industry partially explains these numbers. Industry statistics show 10.4 million visitors for this same time period.¹³

¹¹ Jared Diamond, *Collapse: How Societies Choose to Fail or Succeed* (Viking Press, 2005) 30.

¹² Montana State Library, Public Libraries Statistics Manual.

¹³ Montana Department of Commerce, Figures compiled using data included in ITRR’s *2010 Montana Nonresident Economic Impacts & Expenditures*; ITRR’s *The Economic Review of the Travel Industry in Montana, 2010 Biennial Edition*; Montana

The national context is also crucial here. LSTA funds have a ramification not only on economic development, but also public safety and homeland security given their classification as a *community anchor institution* by the federal government.¹⁴ These funds are also leveraged at the state and local level on programs that use LSTA funding for initial costs.

What were the major benefits, outputs, and outcomes from Montana's LSTA program?

One of the largest changes during the evaluation period is membership in the Montana Shared Catalog, which added 75 member libraries for a total of 140 to date (27 new libraries were added in 2011 alone). While much of this growth is driven by the relatively new nature of the MSC, it still represents a dramatic achievement in a five-year cycle. Comments from focus group sessions regarding the MSC focused on the relatively small amount of staff (4). The Talking Book Library Program increased in patrons from 3,620 in 2007 to 3,963 in 2010.

Over 85% of librarian survey respondents cite strong achievements towards the major outcomes for the use of LSTA funds during this evaluation period (full data on page 21). Data from librarian responses to a 2009 fall training workshop show that 94% of attendees viewed the workshop as useful to their job (*strongly agree*), and a similar number citing that the training materials and experience as meeting their expectations. Information from focus group sessions cited the limited amount of time available for off-site training for many libraries across the state.

What were the major barriers to success with Montana's LSTA grant program?

One of the most frequent comments from focus group sessions was the lack of high speed internet in regions of the state, and the difficulty accessing many of these LSTA-funded programs due to this. The state of Montana recently completed a broadband access map which shows pockets of the state without coverage. This map and other materials are available on the State of Montana's Broadband program at: <http://itsd.mt.gov/default.mcp.x>. Comments from focus groups mentioned the use of LSTA funds to solve coverage problems, yet the cost remains high. Coordination between state agencies should continue as availability impacts every aspect

Tourism & Recreation Strategic Plan 2008-2012; U.S. Travel Association's 2010-11 Survey of U.S. State and Territory Tourism Office Budgets; Montana Census and Economic Information Center, Montana Department of Commerce; and Leisure Trends Group MTOT Conversion Study 2010 & 2011.

¹⁴ National Telecommunications and Information Administration, Broadband Technology Opportunities Program (January 2010).

of both public and private sector operations. The MSL received \$2.7 million for broadband, with some element to address high-speed connectivity.

Another barrier remains the constant need for education and outreach to patrons regarding all of the tools and services that are available at their local library (in most cases regardless of size or location). Comments from the librarian survey and focus groups were within the context of many of these LSTA services becoming available just as the internet was being populated by seemingly infinite material, much of which can hardly be classified as *information*.

What were the major problems with Montana's LSTA grant program?

Information from the focus groups demonstrated some difficulty with certain software involved with LSTA-funded services. “Users may not understand SirsiDynix system due to its functioning different from a browser and what they are used to, and this creates problems.” Comments from technical library staff focused on the need for software vendors to be more proactive and keep up with user preferences. “Integrated library systems aren’t keeping up with what users need and expect, despite a significant investment.”

Information from focus groups also detailed the difference between large libraries and those in small communities with regard to the Montana Shared Catalog, specifically that it is not truly a statewide system since all libraries are not included (Helena and Great Falls are large libraries who are not a part of the MSC). Billings, the largest community library in the state, is a member, yet in joining experienced problems with software (“Montana is not a large market for integrated systems vendors”), the acquisitions module, and the very nature of having a large collection within the existing MSC framework.

Another consensus problem was the lack of available books in MontanaLibrary2Go. There seems to be an understanding that this may be changing soon to meet patron demands; suggestions were for the use of LSTA funds in this area. In the product survey for MontanaLibrary2Go, respondents also cited book unavailability as an issue to be addressed. While the comment section shows clear support for the service, some comments also include: “It’s terrific to have downloadable e-books. Unfortunately it is impossible to find a book that is available. That’s a good sign, because it means more people are using this new service, but I’ve about given up.” “More books!” “More titles have been added.” “Collection keeps improving.” “More audio books!” Well over half of these respondents said they always or often download audio or e-books from outside of the library environment.

<p>To what extent did Montana's LSTA grant program achieve results related to the priorities identified in the Library Services and Technology Act?</p>
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The IMLS has published four congressionally approved LSTA Purposes (listed in their totality in the Evaluation Summary of this report). These purposes are related, in that relationships between libraries allow for better service to targeted groups. Patrons see the effect through such resources as the Montana Shared Catalog. The following patron survey shows the diversity of uses and needs that this online resource provides (note that the 158 respondents find multiple uses for the catalog):

Montana Shared Catalog 2011 Product Survey

I use the online resources at my library for...

my job	21.5%
my business	5.1%
school/class work	23.4%
research	45.6%
pleasure, leisure, or a hobby	97.5%
medical information	13.9%
government information	6.3%
financial information	5.7%
employment search	1.9%

The MontanaLibrary2Go program providing downloadable e-books and audio books is a relatively new resource that is adding titles to try to keep up with demand. This is directly linked to the purpose of expanding services in a variety of formats in all types of libraries. The following chart shows responses regarding patrons' overall satisfaction with the service:

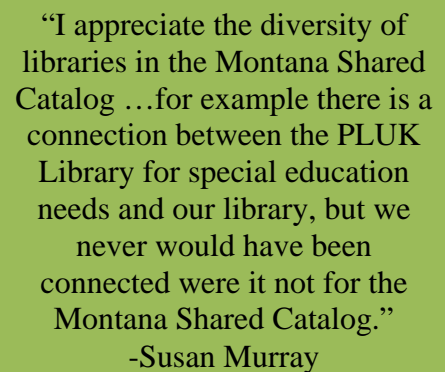
MontanaLibrary2Go Product Survey

Ratings by issue	Excellent	Satisfactory	Not Sure	Needs Improvement	Unsatisfactory
Accessing the collection	37.3%	41.8%	5.6%	13%	2.3%
Searching the collection	23.7%	40.7%	3.4%	26%	6.2%
Downloading from the collection	39.0%	36.7%	8.5%	10.2%	5.6%
Convenience using the collection	27.7%	41.2%	7.9%	15.8%	7.3%
User friendliness of the collection	20.9%	37.9%	11.9%	20.3%	9%
Meeting your reading needs	11.3%	33.3%	14.7%	30.5%	10.2%

The statistical findings in areas for improvement are in ease of use of the collection and having the patron's reading needs met. The individual comments of respondents to this survey further illustrate the abovementioned availability of desired books in the collection and growing pains relating to use of the system.

Information from surveys and focus groups show that librarians link MSL training and professional development with the LSTA purposes and priorities related to expanding access to information and services. This is once again within the context of the large volume of information and rapidly expanding technologies, with the training critical to better assist patrons. Both training and consulting services received highly favorable comments from librarians during focus group sessions, with specific mention of both services providing a balance of options for larger libraries with full time staff and those with small staff size or libraries that rely on part time employees (perhaps with little formal library education/training), volunteer trustees, etc.

Linkages between libraries remain another key component of how libraries interact in Montana. Information from the focus groups provided greater clarity with regard to the impact on rural libraries. During the focus groups, representatives from Miles City (pop. 8,410), Forsyth (pop. 1,777), Colstrip (pop. 2,214), Glendive (pop. 4,935), Hamilton (pop. 4,378), and Darby (pop. 720) were unanimous in their support of the Montana Shared Catalog, which they say allows them to function "on equal footing" with large libraries both in state and nationally.¹⁵ "It represents equal opportunity." Susan Murray, librarian for the State's Office of Public Instruction, said one critical area that goes beyond information or data sharing is the networking opportunities between librarians.



"I appreciate the diversity of libraries in the Montana Shared Catalog ...for example there is a connection between the PLUK Library for special education needs and our library, but we never would have been connected were it not for the Montana Shared Catalog."
-Susan Murray

Interviews with patrons of the Montana Talking Book Library program clearly demonstrated the value of the service to these individuals; the research team received only positive comments regarding services and staff, and 91% of patrons surveyed rated the TBL as *very valuable* or *essential*.

¹⁵ U.S. Census Bureau, 2010 Census Summary File 1.

To what extent did Montana's LSTA grant program meet the goals and objectives outlined in the Montana State Plan 2008-2012?

Patrons recognize their local libraries as a place to have their information needs met. As previously noted, 98% of library patrons surveyed said the online resources at their library are *convenient*; 92% said they *always* or *frequently* had their information needs met. The librarian survey demonstrates that a majority of community-based librarians believe there has been *good* or *significant* progress on each key benchmark. From the librarians' perspective, 61% of librarians rated the Montana Shared Catalog as *very valuable* or *essential* to their patrons.

2012 Montana Librarian Survey

	Not Achieved	Limited Progress	Good Progress	Significant Progress	Fully Achieved
Montana citizens will report higher quality of library services	3.1%	11.3%	42.3%	38.1%	5.2%
Montana citizens will highly value library services	4.1%	8.2%	47.4%	36.1%	4.1%
Montana citizens and students use and value electronic information services available through their libraries	2.1%	13.4%	35.1%	44.3%	5.2%
Montana libraries offer reliable and adequate access to electronic information and other resources	1.0%	8.2%	33.0%	47.4%	10.3%
Montana citizens and students use and value materials and tools available for local programming	1.0%	20.6	45.4%	30.9%	2.1%
Training provided to Montana library staff and trustees improves library service	3.1%	6.2%	38.1%	43.3%	9.3%

Process Questions

How satisfied are library staffs throughout the state with administration of the LSTA grant program?

In general, the survey responses suggest no changes to the current administration of the LSTA Grant Program through the MSL. Comments show the diversity of library institutions included in the survey, with some mentioning that without LSTA they would still be checking materials out by hand, and others addressing professional level MLS training. MSL consulting services

and training were singled out in focus groups sessions. Participant comments regarding MSL consulting services focused on the wide range and quality of services available (from architectural to legal environment, to organizational structure, etc). For the MSL training component, participants explained the diversity of available training, i.e., a senior librarian with an MLS can find something beneficial in the available training (“I just had the best training I ever had that was recommended by MSL”); while others who may be new library staff without prior direct educational training or professional development can also have their needs met. Participants also saw a strong role of the MSL training component in finding online training and helping “weed out” some of the materials that are not as helpful to working librarians. The following statements from the librarian survey and focus groups are illustrative:

“Love the State Library and all its outreach to librarians ‘in the field!’ ”

“LSTA is essential to libraries around the country, but I can't emphasize enough the impact these funds have on the libraries in the state of Montana. We may not have a huge population, but MSL is able to do a lot with a little, serving diverse communities around the state. The expectations people have for services that should be provided by libraries and their dependence on those services being provided at no cost have grown exponentially at a time when library funding has generally been decreasing. LSTA funds enable us to meet and exceed the expectations of our communities, and to ultimately make our communities a better place to live and work.”

“When I ask classes about their Homework.MT experiences, most say they have found the tutoring helpful and timely.”

“We would not be able to provide the quality of service if it was not possible through LSTA funds. We would not be able to purchase such things as MTlibrary2go, Heritage Quest, EBSCO Host, etc. by ourselves. Our patrons rely on these services because our area is rural and isolated. They are not always able to get to their library and are very appreciative that library services can be accessed in their own home.”

“The MSL public awareness or PR programs can be tricky: when they have ads in media that say go to your library and you will have access to the Montana Shared Catalog, but if the library is not a member then the patron is confused. Secondly, MSL may also give the impression that local libraries are branches of the MSL, and they provide a very small percentage of our funding.”

“We would not have the quality online materials and training without the LSTA funds.”

“LSTA funds are wonderful, but they are bare bones. Without the seed money, we wouldn’t have a starting point, but sometimes MSL forgets they are just seed money.”

“I have to give kudos to the Montana State Library for their efforts to administer the LSTA. They are really thinking about the needs of Montanans and considering the rural nature of this state.”

What changes would library staffs like to see with the LSTA grant program, as long as state and federal requirements are still met?
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As was listed in the previous question, many of the librarian survey responses addressed the fact that the program was working effectively and did not recommend changes. Comments in the survey and focus groups addressed continuing to use LSTA funds to ensure statewide systems and programs. Most other comments dealt with priorities within the administration of LSTA, not changes in the program per se. The largest consensus to come out of the focus group sessions was the need for Montana policy makers to address appropriations to MSL so that LSTA funds currently being used centrally can provide greater services at the local level. The following statements from the librarian survey are illustrative:

“I would like to see an increased focus on the importance of the partnership between local public libraries and other libraries with MSL, using LSTA and other funding, to enhance service to Montanans. This partnership will continue to move more extensively into the production, licensing, organization, provision of access to digital information, as well as training for staff and end-users on how to access, evaluate, and use it.”

“LSTA funds should serve all public libraries equally. Projects that do not serve all should be paid for by individual libraries.”

“It would be nice if there was a statewide group that would write grants for small public school libraries for funds. Our program is the first to be cut and the last to receive any district money!”

“I wish that the State Library could help or encourage library directors to get more staff library certified and better trained and educated.”

“I think the training of trustees needs a lot more attention. I think library trustees in general should get more attention. These local boards control a great deal of the outcome of library services, and yet very often they are not drawn into the fold and given the tools they need to do the vital job they have.”

“The system that is currently in place for CE is not at all user-friendly. I do not have an MLS degree, and am very interested in personal improvement, as I love my job, but the CE program seems so unstructured and confusing as to be unappealing. Improving this would be very exciting for me.”

“More local trainings and/or webinars that are relevant to early literacy in the library.”

“The timing and location [of training] can be difficult, though it is clear with the geography and weather of our state why this is the case. I wish more training coincided with the down time in our community (in our town late fall and early spring) or happened in one big block (such as combining MSC meetings with the Fall Workshop). Too often, MSL events happen too close to other essential meetings, and libraries with small staff are forced to choose.”

“User-friendliness is essential. It doesn't make sense to have a database that frustrates staff and patrons rather than helps them (Heritage Quest).”

“I love Homework.MT, MontanaLibrary2Go, Automotive & Small Engine Repair Database. I didn't know about the MT Hunting or Fishing database or the CINAHL (but I'm VERY excited about CINAHL). So I could do without MT Hunting or Fishing Companion.”

“Amount of book copies available on MontanaLibrary2Go needs to be increased for adult readers, too many titles for middle school/high school are not being used by patrons vs. books needed for adult readers.”

“I would add Novelist, we use it every day at our library and I know that other libraries would place high value on it if they had this resource...”

“I would love to have a foreign language component. Our patrons are asking for an online language help but we do not have the funds individually to make this happen.”

How have grant program data been used to guide policy and managerial decisions affecting Montana's LSTA program?

The MSL has used grant program data to formulate and prioritize needs for the administration of the LSTA funds in the following ways:

- In a previous survey, 35% of responses related to the need for MSL to continue to provide as many services as possible at the community level;
- In a previous survey, 73% of responses related to the leadership role of the MSL, with a direct correlation in the area of consulting and training;

- Over 20% of previous survey responses related to cooperative efforts rather than local libraries competing for funds; and
- In response to the TBL program, compiled statistical data shows that individuals retiring during the period of this evaluation study are three times as likely to develop visual disabilities between the ages of 50-70 than their parents.¹⁶

What have been important challenges to using outcome-based data to guide policy and managerial decisions over the past five years?

Challenges to using outcome-based data are rooted in the large size of the shared constituency of the MSL and their partners: at a minimum the populace of the state plus those working or recreating in Montana on a part-time or visitor status. There are also challenges with regard to staff turnover and communities who are struggling to keep core institutions open due to population migration and decline in total population numbers. This creates a moving target for data collection. This is reflected in the numbers collected as part of this evaluation. Using the Talking Book Library as an example, the following reflects librarian survey respondents' knowledge of the TBL program over the recent evaluation period.

Librarian Knowledge of TBL:

	2007	2012
No Knowledge	24%	20%
Somewhat Knowledgeable	42%	49%
Good Knowledge	30%	29%
In-depth Knowledge	4%	2%

Prospective/Outcome Questions

How should State Library staff share grant program data and other evaluation-related information within and outside the State Library to inform policy and administrative decisions during the next five years?

The relationship between the MSL and regional libraries is arranged to share data and information and seek community based input in decision making (as this evaluation process

¹⁶ Montana State Library, LSTA Five Year Plan 2008-2012.

demonstrates). The research team recommends that the MSL continues to view community-based libraries as their partners and share data as such.

As an example, the data from the Montana Shared Catalog survey shows the uses of library patrons for their library's online catalog as follows:

Placing holds/reserves on library materials	94.3%
Renewing a checkout	91.7%
Booklist or reading suggestions	43.9%
Mobile applications	6.4%
Email notifications for holds and overdues	68.2%
Other features	15.3%

In the category of other features, respondents describe interlibrary loans and receiving materials from other libraries, downloading music and related materials, accessing MontanaLibrary2Go, and doing keyword searches to locate or identify books that they are not yet aware of. Sharing data of this nature is important to track use of online catalogs as it evolves over time (and there are increased linkages between libraries and related institutions).

Similarly, the aforementioned issue of total number and content specific materials within MontanaLibrary2Go has a programmatic data component that should be shared between library staff. Approximately 16% of survey respondents indicated they download books and materials while at the library, in many cases involving librarian assistance, giving front-line library staff a unique perspective for the user-friendliness of the system and a sample group to recommend changes.

Sharing program data from the Montana Memory Project is another example of evaluative material for the upcoming evaluation period. While 34% of the respondents to the general patron survey say they are aware of the project but do not use it, a majority said they were unaware of the Montana Memory Project. The data from this product-specific survey shows users who are well versed in the project, but have issues related to user-friendliness/convenience/downloading. Comments from each focus group session confirmed these numbers shown below:

2011 Montana Memory Project Survey

Ratings by issue	Excellent	Satisfactory	Not Sure	Needs Improvement	Unsatisfactory
Accessing the collection	53.8%	26.7%	6.7%	6.7%	6.7%
Reliability of the collection	46.7%	40%	0%	6.7%	6.7%
Convenience using the collection	53.3%	20%	0%	13.3%	13.3%
User friendliness of the collection	46.7%	20%	6.7%	6.7%	20%
Meeting your information needs	33.3%	40%	6.7%	6.7%	13.3%

While some of the statistical outcomes are due to the relatively small size of the survey, subsequent sampling is likely to increase in numbers as the program becomes more well known, in part through individual efforts taken on part of local libraries (example on page 15-16).

How can the grant program data collected and analyzed to date be used to identify benchmarks in the upcoming five-year plan?

Grant program data can be used to try to establish the nexus between emerging technologies and Montana library patrons' interests and information needs in the next five-year evaluation period. The data from the librarian survey on a question relating to library staff knowledge of LSTA-funded products and tools allow for analysis and the development of hypotheses for the upcoming period. As the following chart shows, while each online product or tool finds usage by a significant number of librarians in direct service provision to patrons, there are respondents in each category who are unaware of specific products and tools. While demand in a specific location may explain this (i.e., often times, front-line library staff become aware of a product or tool through their own initiative in seeking out an information need for a patron), it also shows targeted goals for library staff (as would correlating patron data).

A target is to continue to increase awareness and use with regard to LSTA-funded product or services by library staff (with the one caveat of allowing for specialized libraries that do not see patron demand for a particular product or service). Separate to this is the use category, which is driven even more by patron demand. Focus could then rest with categories which are known to library staff but not used by as many respondents. Some of this data may be explained by the newness of a product or tool. The Courier program was a pilot, and as funds are spent on start-up costs going forward, this program lends itself to benchmark identification. Participants in the focus groups further illustrated the need for such a program in support of non-digital material transport.

LSTA-funded product or Service	Unaware of this product/tool	I use or help patrons use product/tool
Statewide online periodical databases (InfoTrac, then Ebsco)	2.9%	73.3%
OCLC (e.g., WorldCat, FirstSearch, Ill, Connexion/CatExpress)	2.9%	62.9%
Montana Memory Project (digital cultural heritage collections)	11.4%	21.0%
MontanaLibrary2Go (downloadable audio and e-books)	1.0%	66.7%
Heritage Quest (genealogy database)	7.6%	44.8%
Automotive or Small Engine Repair Reference Centers	1.9%	65.7%
CINAHL (nursing resources database)	21.0%	24.8%
Environment Complete (environmental resources database)	24.8%	22.9%
Montana Hunting or Fishing Companion	21.9%	38.1%
Homework.MT (online live tutor resource)	1.9%	48.6%
Montana Library Directory	2.9%	55.2%
Montana Courier Pilot (materials moved between libraries by a courier service)	9.5%	30.5%

The data above show great growth potential for the use of the Montana Memory Project, and this combined with data from the product-specific survey can be used in benchmarking. Although this program is not widely known, combining this with data from the Montana Memory Project survey demonstrates enthusiasm for those who are involved (even as technological growing pains are a part of the equation). The data can also be used in areas such as MontanaLibrary2Go, which while showing almost universal knowledge of the service, still has a third of librarians reporting they do not use or assist patrons with the use of the tool. Indeed this may be due to a number of factors (patrons' accessing off-site, availability at a particular library, etc.), but the overwhelming positive reaction to the program in the product specific survey allows for benchmarking in growth of this emerging program.

What additional data should be collected over the next five years? What data are not useful and should no longer be collected?

Additional outreach attempts to library patrons would be beneficial over the next five-year period. With hectic modern schedules, reaching a sizable number of patrons proved difficult.

Perhaps rather than a state-level coordinated survey or focus group session, a standard survey could be developed by the State to be administered at the local level.

Much of the data collected used similar identifiers to allow MSL and all stakeholder groups to look at historic data trends (even beyond the analysis included in this evaluation). The enthusiasm and high ratings of this program for those who are using it portend for growth in the use of this product, especially as it is populated with additional material for potential users to review.

While questions on the Talking Book Library interview script asked for suggestions for improvement and prompted participants for problem areas, not one respondent wanted to see a change in the service they receive. That said, these are important questions to ask in future surveys/interviews.

How can the State Library more effectively use outcome-based evaluation data as a policy and managerial tool?
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A review of Montana State Program Reports for the years of 2008, 2009, and 2010, shows that MSL used output, outcome, and anecdotal based data for such LSTA-funded programs as training, the MSC, the TBL, and the Statewide Collaborative Access Project. While MSL was able to gather considerable information on outputs (staff allocation, resources expended, etc), as well as anecdotal data, outcome-based information was used more sparingly. Outcome-based evaluation data does indeed involve greater effort and requires resource commitments. For example, the TBL program was able to finalize a 2011 patron survey (data from which is included in this evaluation), which should yield outcome data in the 2011 Montana State Program Report.

Similarly, the Statewide Collaborative Access Project implemented a methodology for evaluating a playtime training event. Although data has not yet proved analytically useful, the exercise did produce anecdotal information. Patron and librarian surveys and related information gathering exercises are required to produce outcome-based evaluation data.

D. Recommendations and Justifications

- ❖ MSL should use evaluation data (including complete data beyond what is listed in this document) to explore patron/librarian use of specific LSTA-funded products and services where survey data shows evidence of the product and service improving library services. Data from the product specific surveys demonstrates this in the instance of the Montana Memory Project,

MontanaLibrary2Go, and the Montana Shared Catalog. Future product-specific surveys will allow the State to compare and contrast these products and services.

- ❖ MSL should continually evaluate its outreach campaign to make all libraries aware of these programs and services. The data demonstrates the need to be ever vigilant with regard to promotion of all products and services where an investment has been made.
- ❖ MSL should continue to explore options to make the Montana Shared Catalog a statewide system involving all libraries. The complicated issues that arise from serving greatly diverse local political jurisdictions and communities with regard to geographic location and demographics (population) is nothing new to Montana state government. It is also noted that MSC is in a growth phase and limited staff resources are logically directed at service to the many candidate libraries that are aware of the benefits to their patrons and eager to join. The following evaluation period should include an analysis of MSC in both urban and rural libraries.
- ❖ The next decade will experience crucial societal demographic changes that will impact both the MSL's and local libraries' services to a target patron group. Specifically, the Montana Talking Book Library program serves many patrons who are dependent upon traditional delivery systems for audio books (cassette and digital), and the reality of certain individuals' life experiences, physical limitations, access to the internet, and the natural human inclination to embrace that which is known and comfortable means many TBL patrons will not transition to new delivery systems for this service. The patron group is diverse, and many will find a seamless transition as the TBL program embraces other delivery systems, yet MSL should maintain access to all formats through archived materials.
- ❖ MSL should continue to use LSTA funds in areas of emerging technologies and products that expand the very definition of a library from what it was a generation ago. The empirical support of online-based resources in this evaluation, wedded to the comments in both the surveys and focus groups, shows that these types of products and services bridge the miles between regional and local community hubs that serve the segments of the Montana population who live in a rural setting (and equally the many Montanans who live in an urban setting that remains a great distance from the nation's population centers). MSL should also continue to use LSTA funds in programs that support bringing physical materials to the library location in the understanding that patrons included in this evaluation support the concept of the virtual library, and recognize the value of increased service and individual economic benefit of bringing the library into their home or office, even as they maintain a sense of pride for what is a traditional community institution.

III. Annexes

A. List of Acronyms

LSTA: Library Services and Technology Act

MSL: Montana State Library

TBL: Talking Book Library

IMLS: Institute of Museum and Library Services

MLS: Master of Library Sciences

MSC: Montana Shared Catalog

PLUK: Parents, Let's Unite for Kids

EBSCO: Elton Bryson Stephens Company, an online database offering journal articles.

B. Libraries Represented in Focus Groups

Please note that individual participant names are being kept confidential at the request of the MSL.

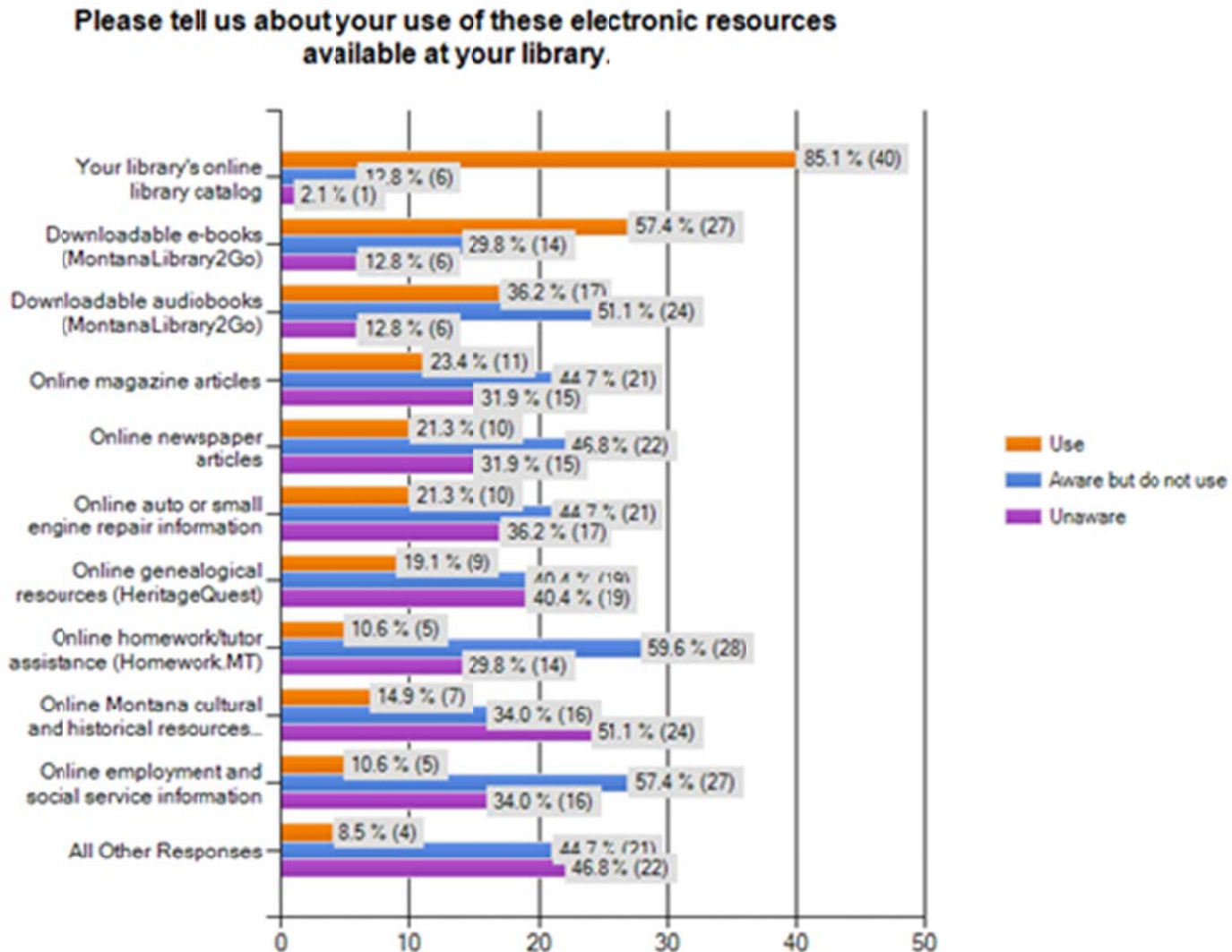
- Rosebud Co. Library, Forsyth
- Bicentennial Library, Colstrip
- Rocky Mountain College Library
- Parmly Public Library, Billings
- Miles City Public Library
- Yellowstone Boys and Girls Ranch
- Miles City Community College
- Lewis and Clark Library, Helena
- Montana Office of Public Instruction
- Montana Historical Society
- Montana City School
- MCPS, Missoula
- Hellgate High School, Missoula
- Bitterroot Public Library
- North Valley Public Library
- Missoula Public Library
- Darby Community Public Library

C. Bibliography of All Documents Reviewed

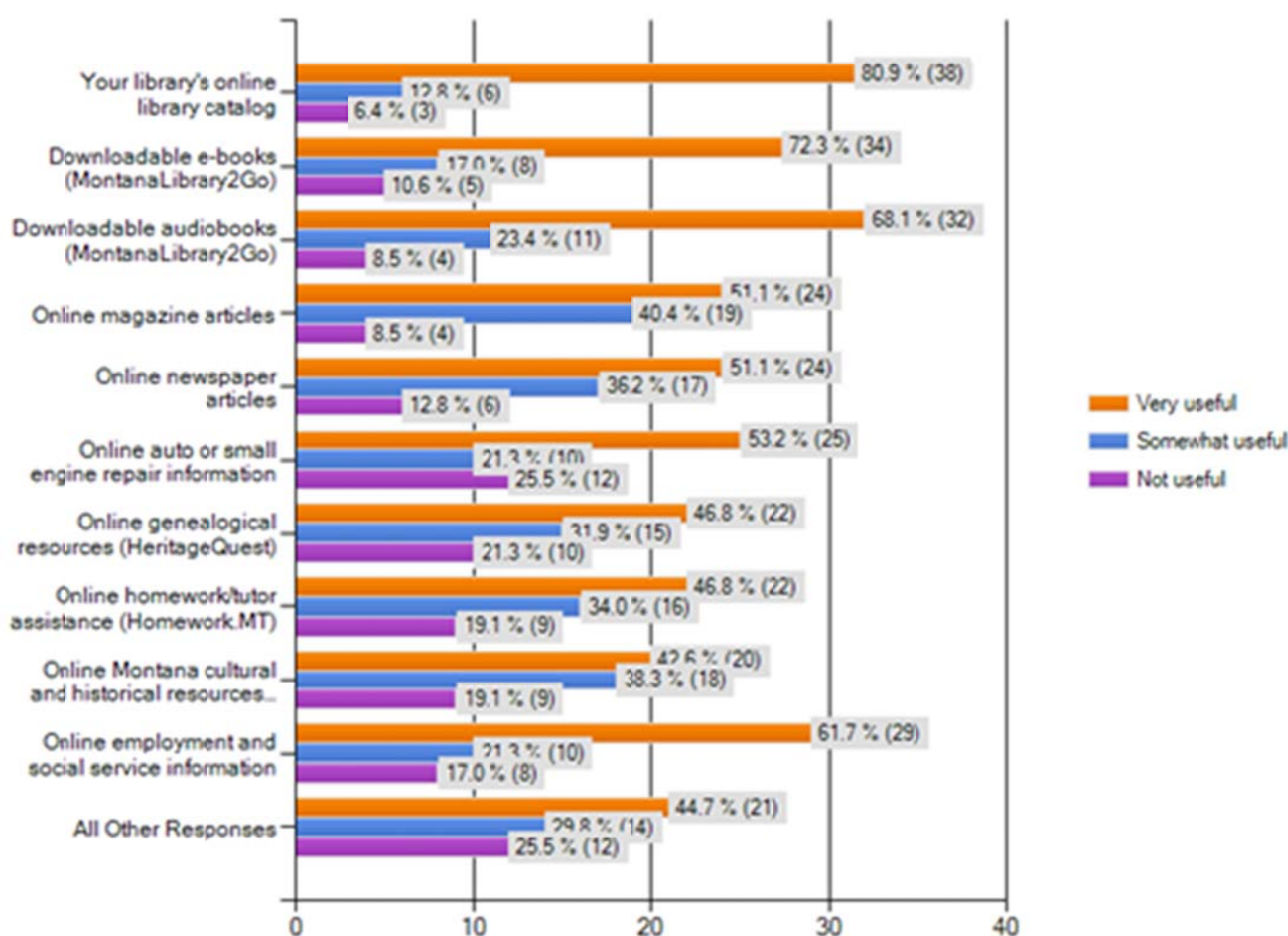
1. Montana State Library, LSTA Five Year Plan 2008-2012
2. Institute of Museum and Library Services: *A Catalyst for Change: LSTA Grants to States Program Activities and the Transformation of Library Services to the Public* (June 2009).
3. Montana State Library 2011 Annual Report
4. Montana State Program Report Summary
5. Montana State Library, Public Libraries Statistics Manual
6. Montana Department of Commerce, *The Montana Approach* (2009)

D/E. Output of Statistical Findings Described in the Evaluation; Copies of any Research Instruments used for Surveying, Interviewing, and/or use of focus groups.

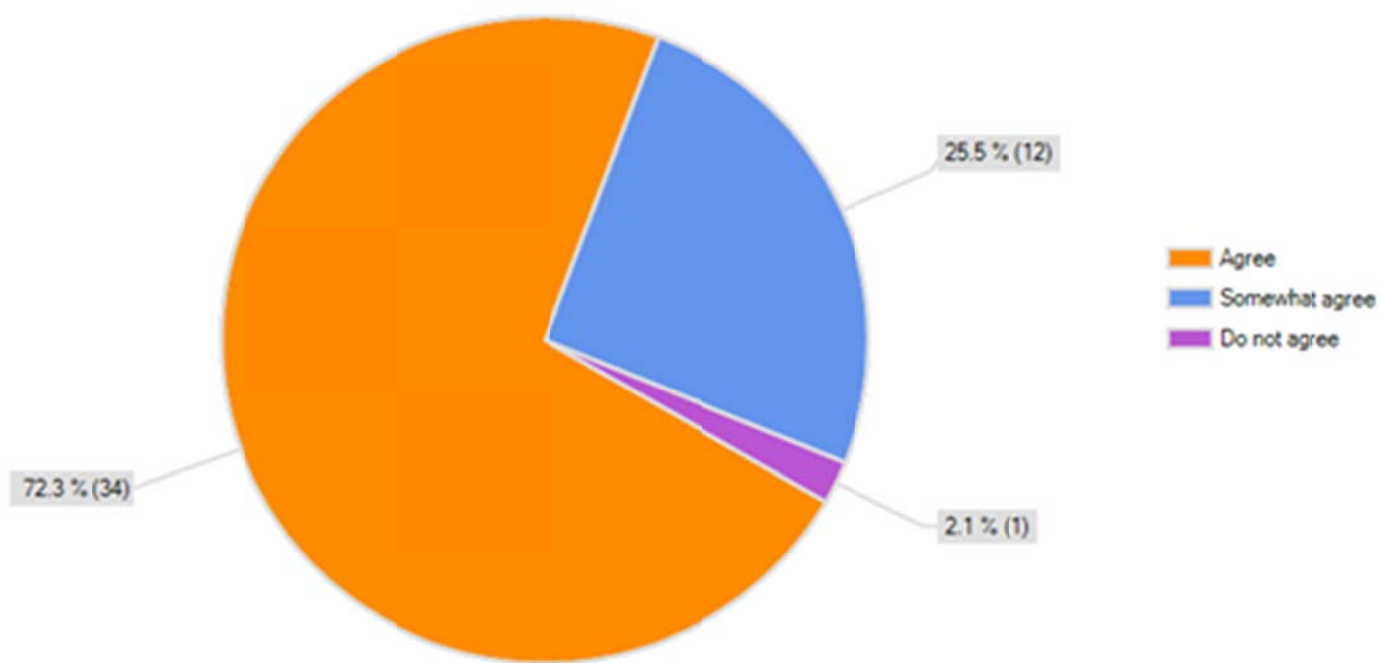
I. Patron Survey Responses: Charts and Full Answers



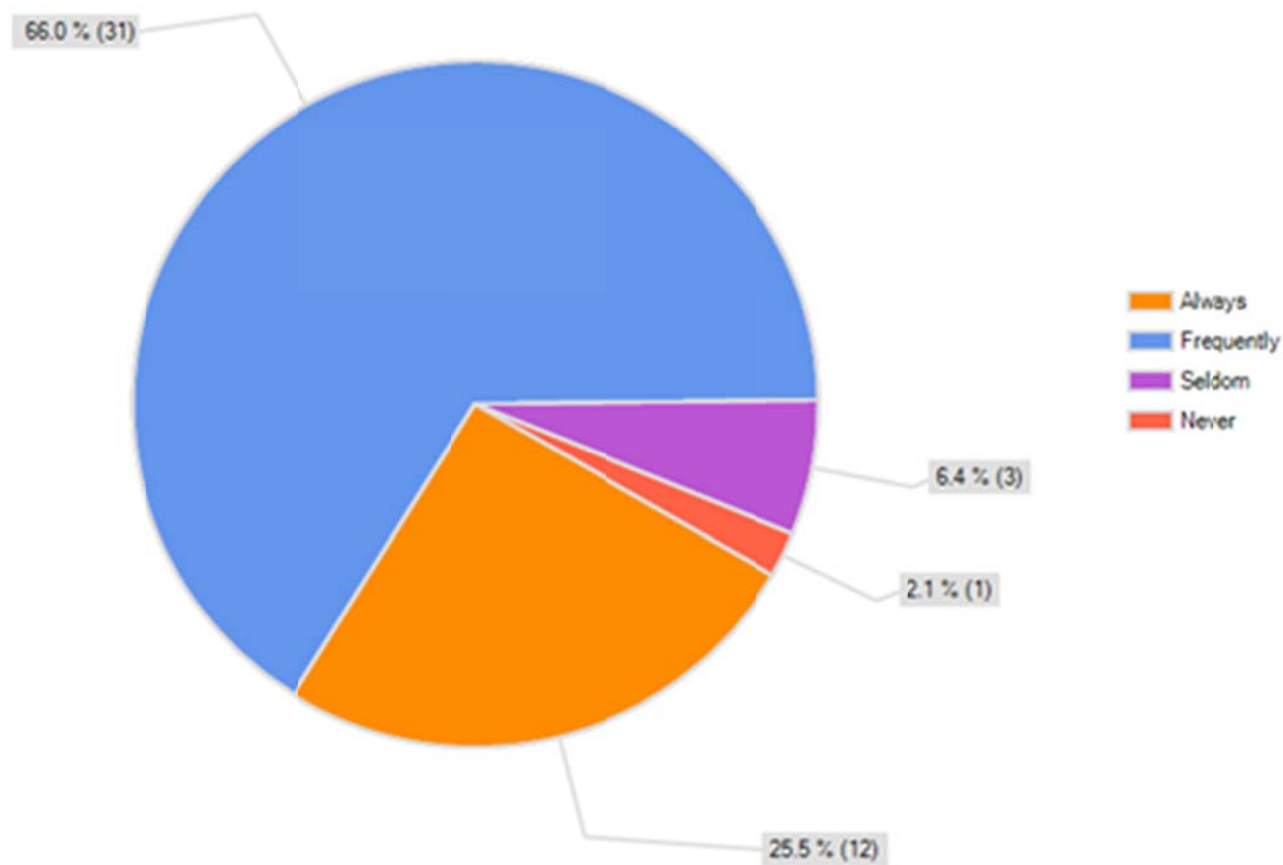
How would you rate the online resources available at your library?



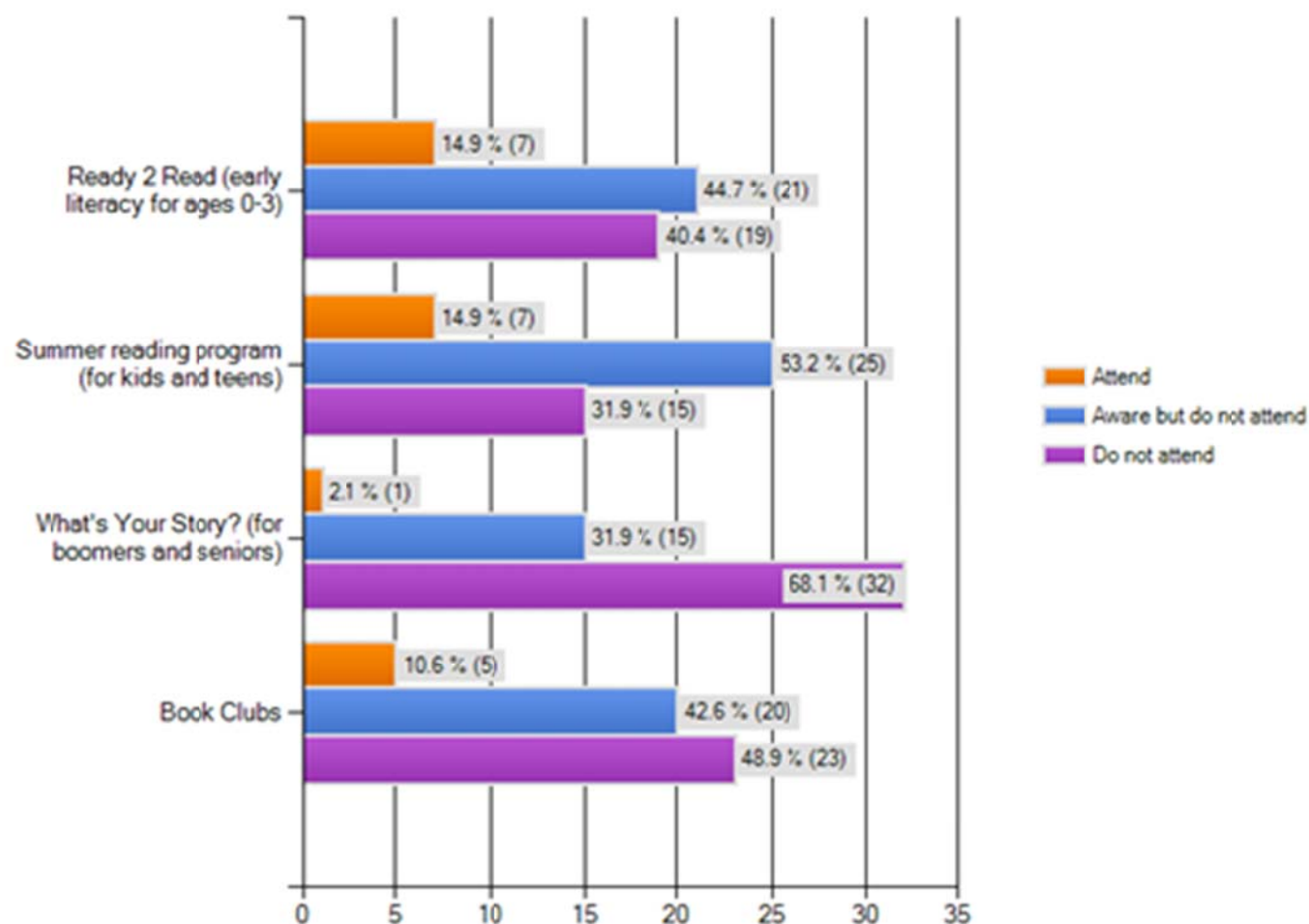
Accessing these online resources at my library is convenient.



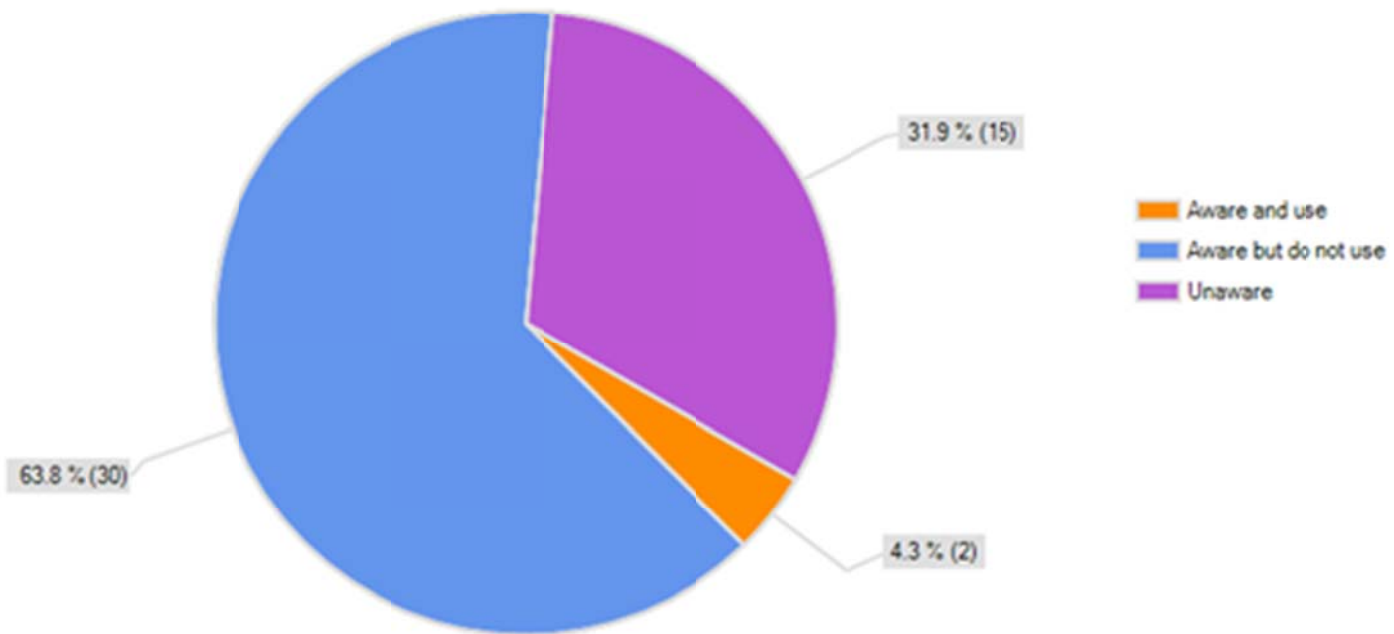
The online resources available at the library meet my information needs.



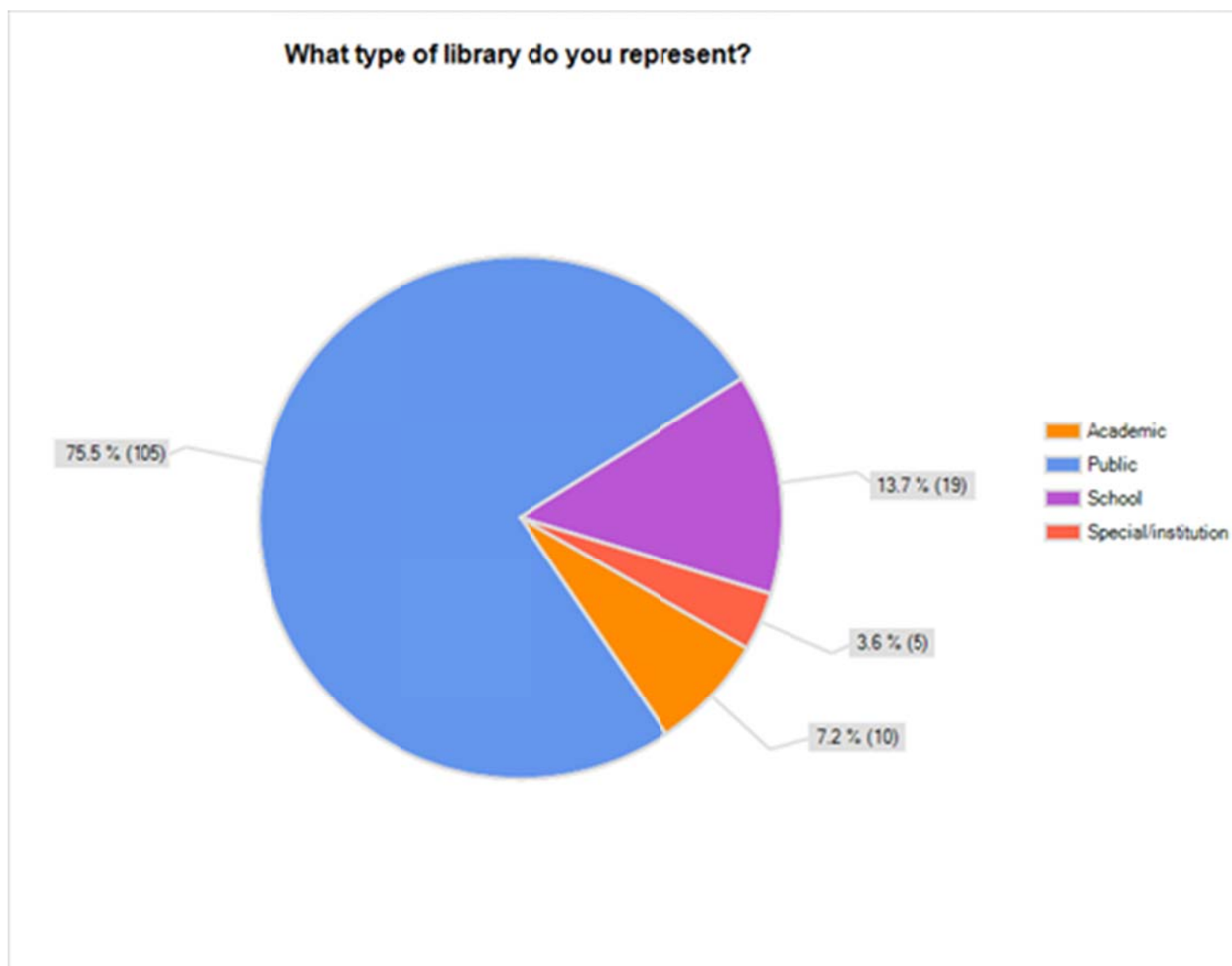
Do you or members of your family attend programming provided by the library?



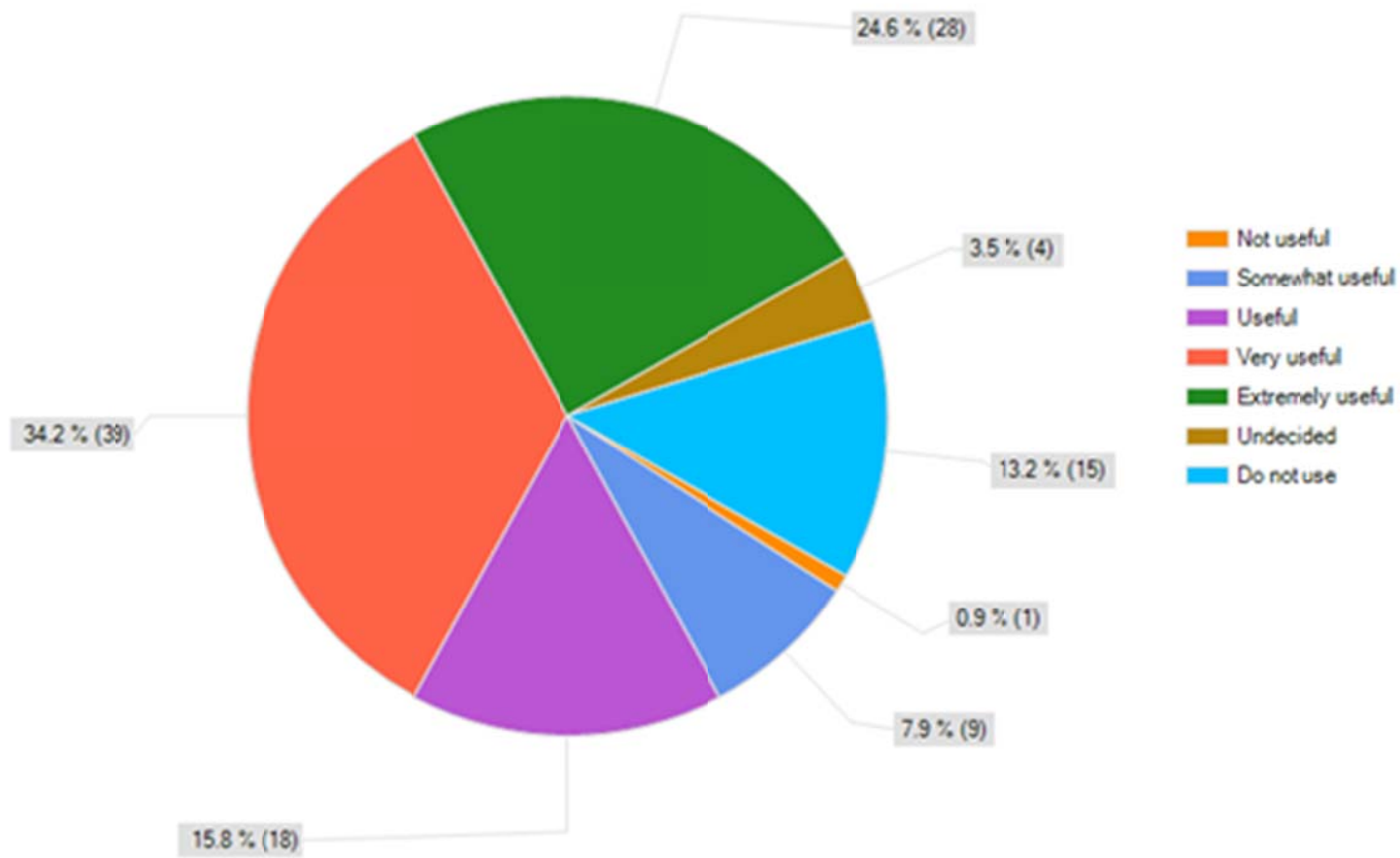
Are you aware of the Montana Talking Book Library that provides access to materials for Montanan's with low vision or a physical or reading handicap?



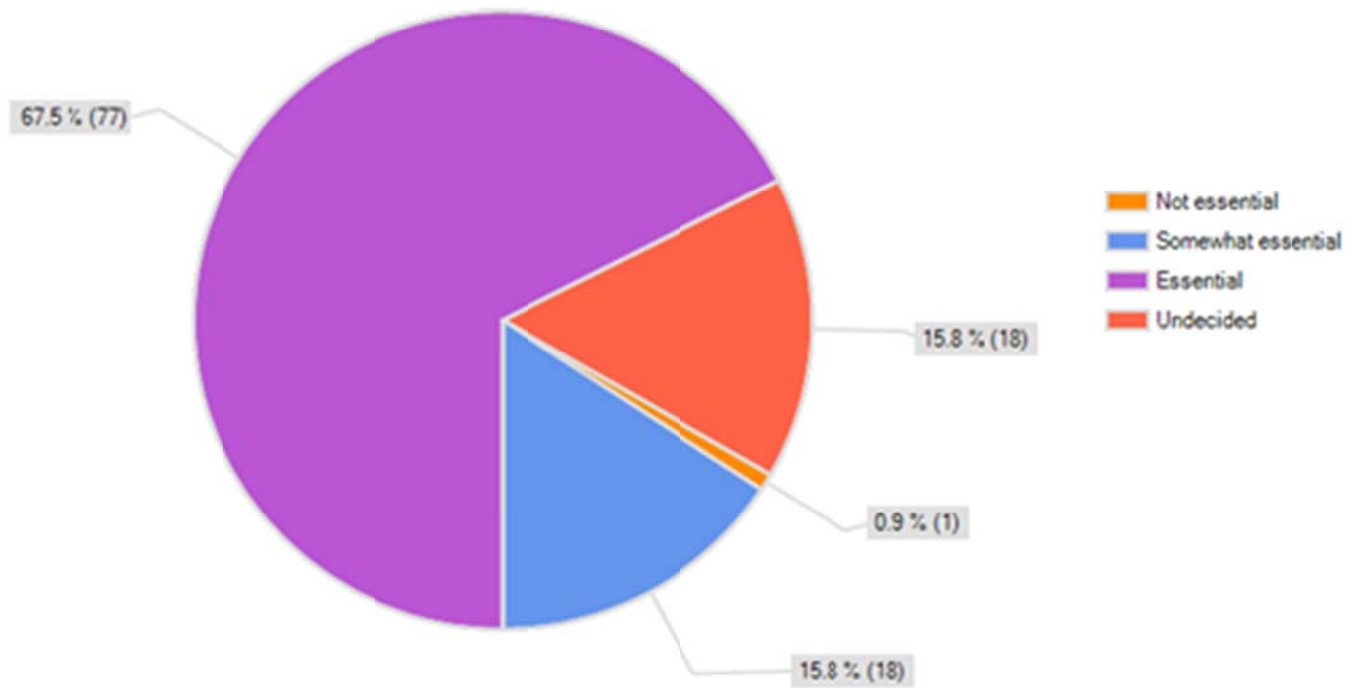
II. Librarian Survey Responses: Charts and Full Answers



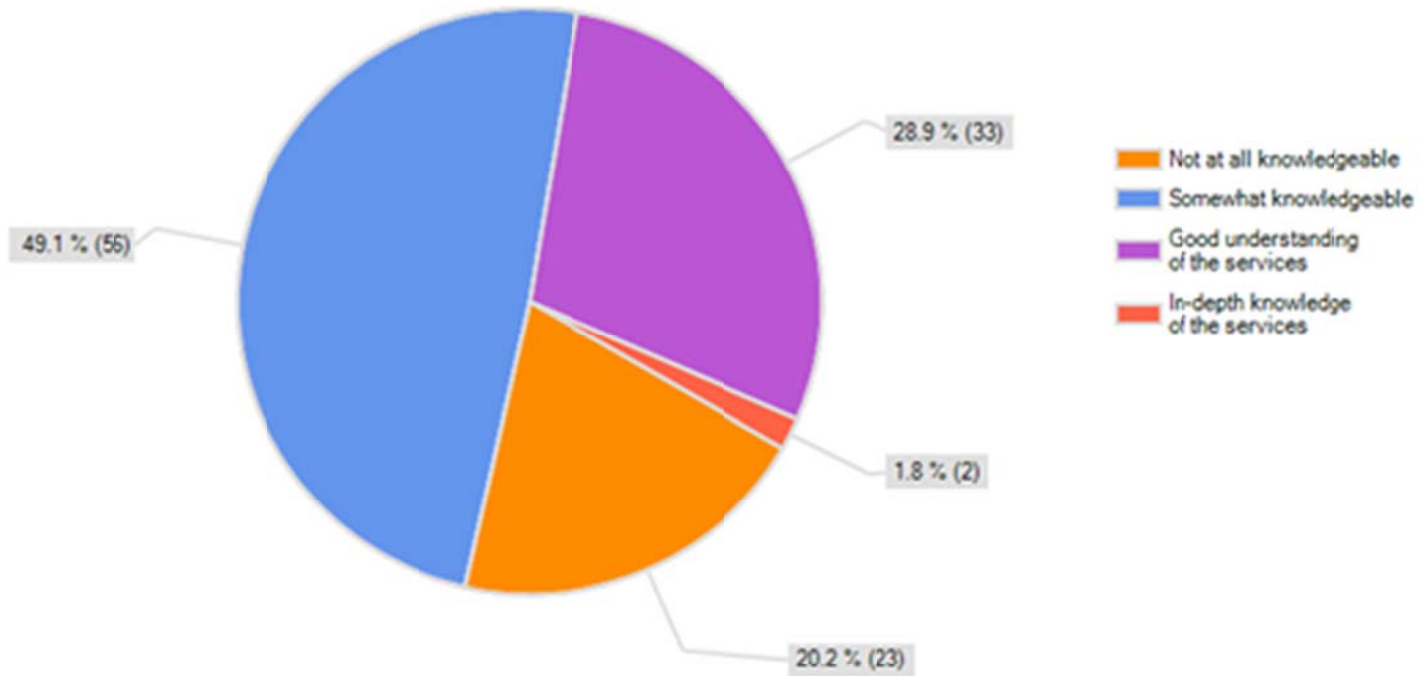
Please rate the usefulness of consulting services provided by Montana State Library.



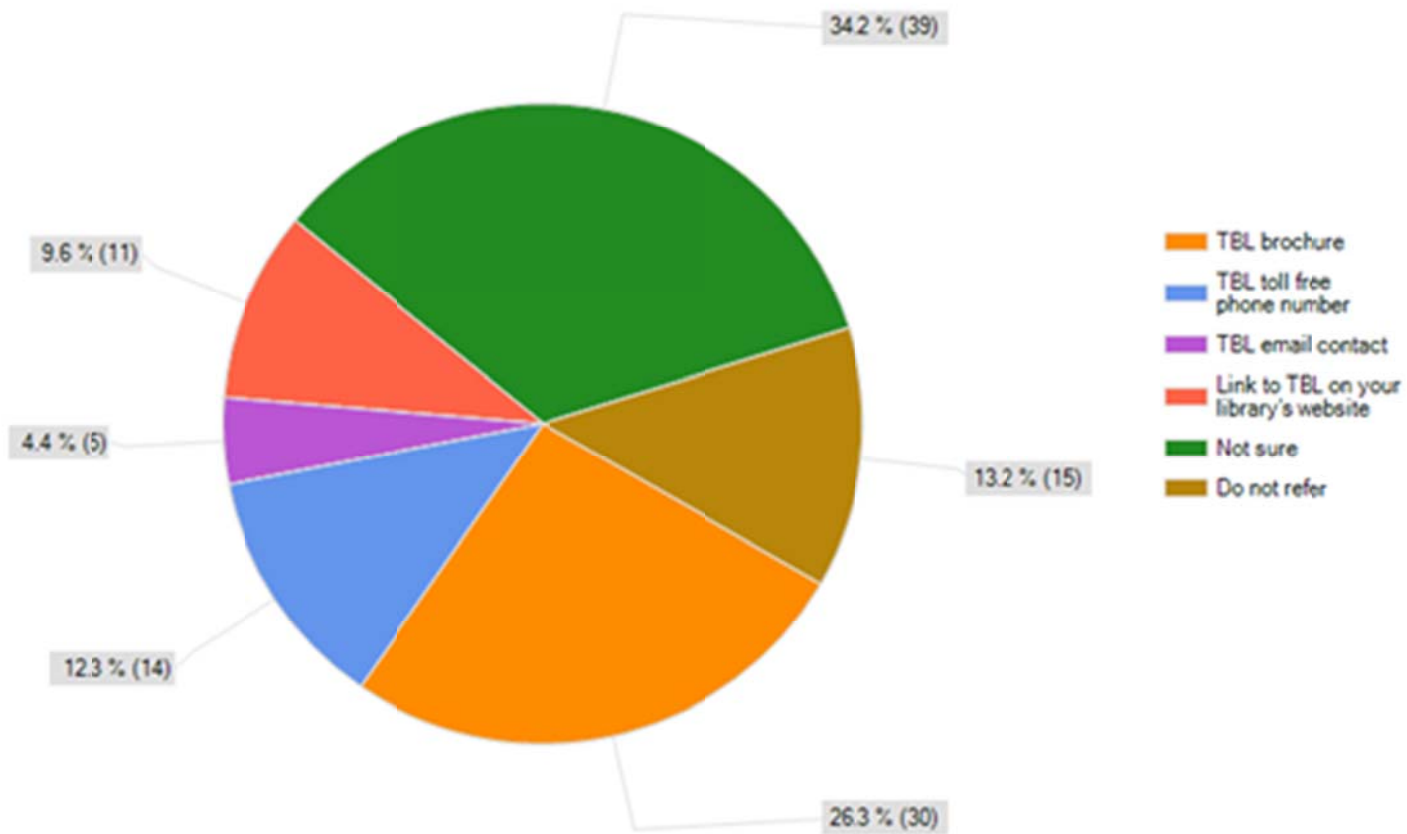
How essential are consulting services provided by Montana State Library?



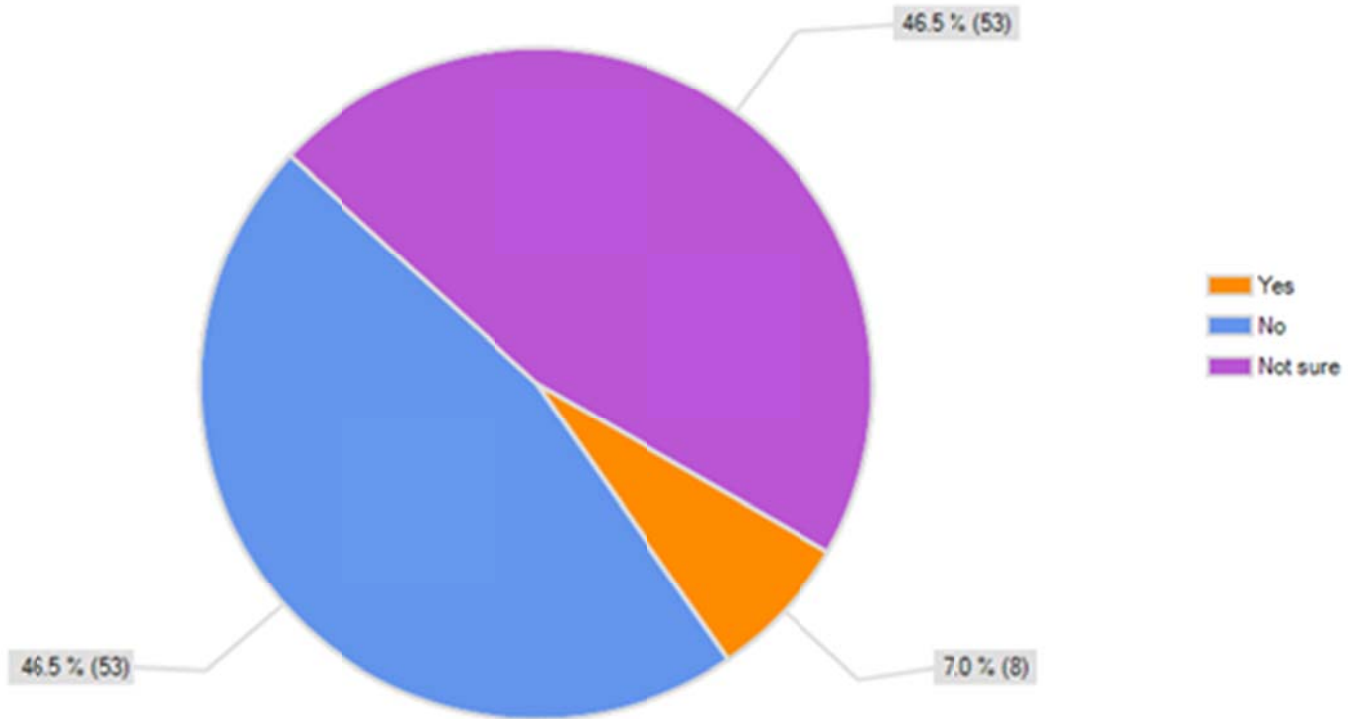
**How knowledgeable are you of the services of the Montana
Talking Book Library?**



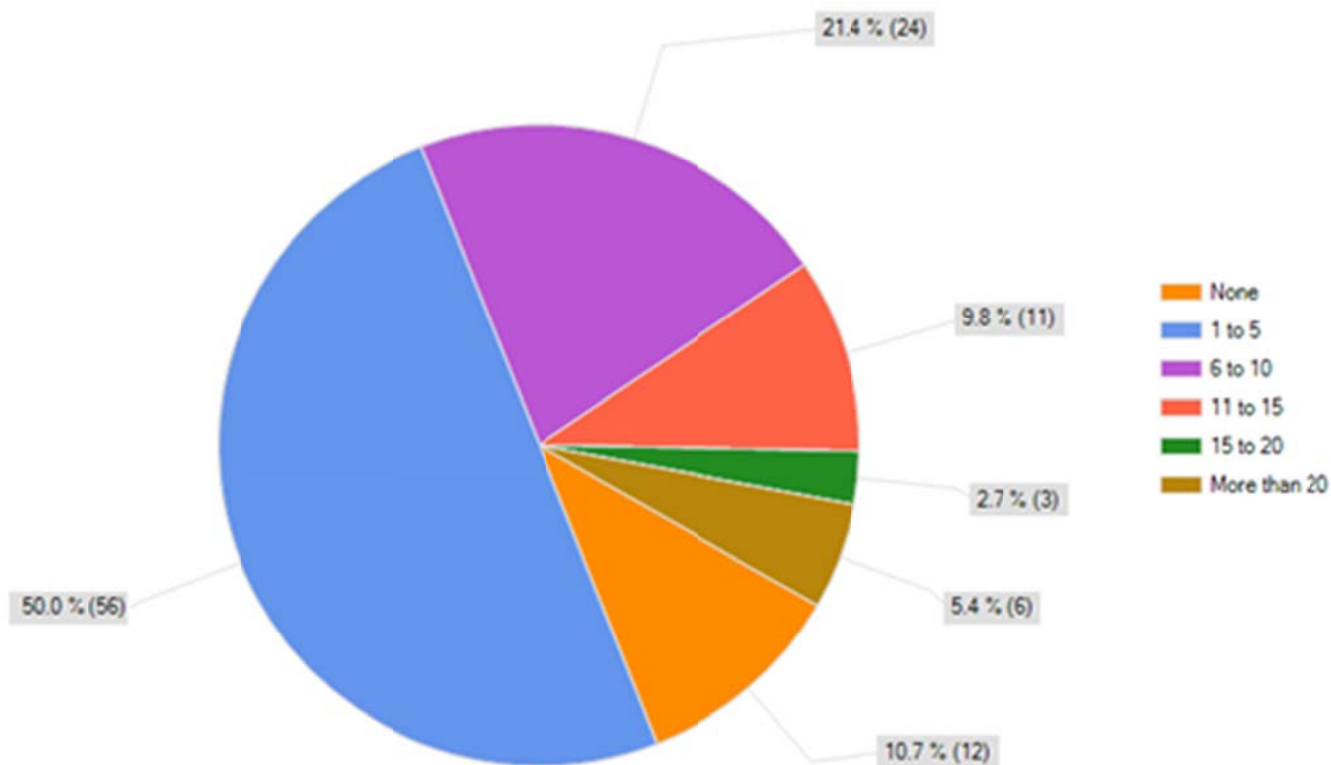
How does your library make referrals to the Talking Book Library (TBL)?



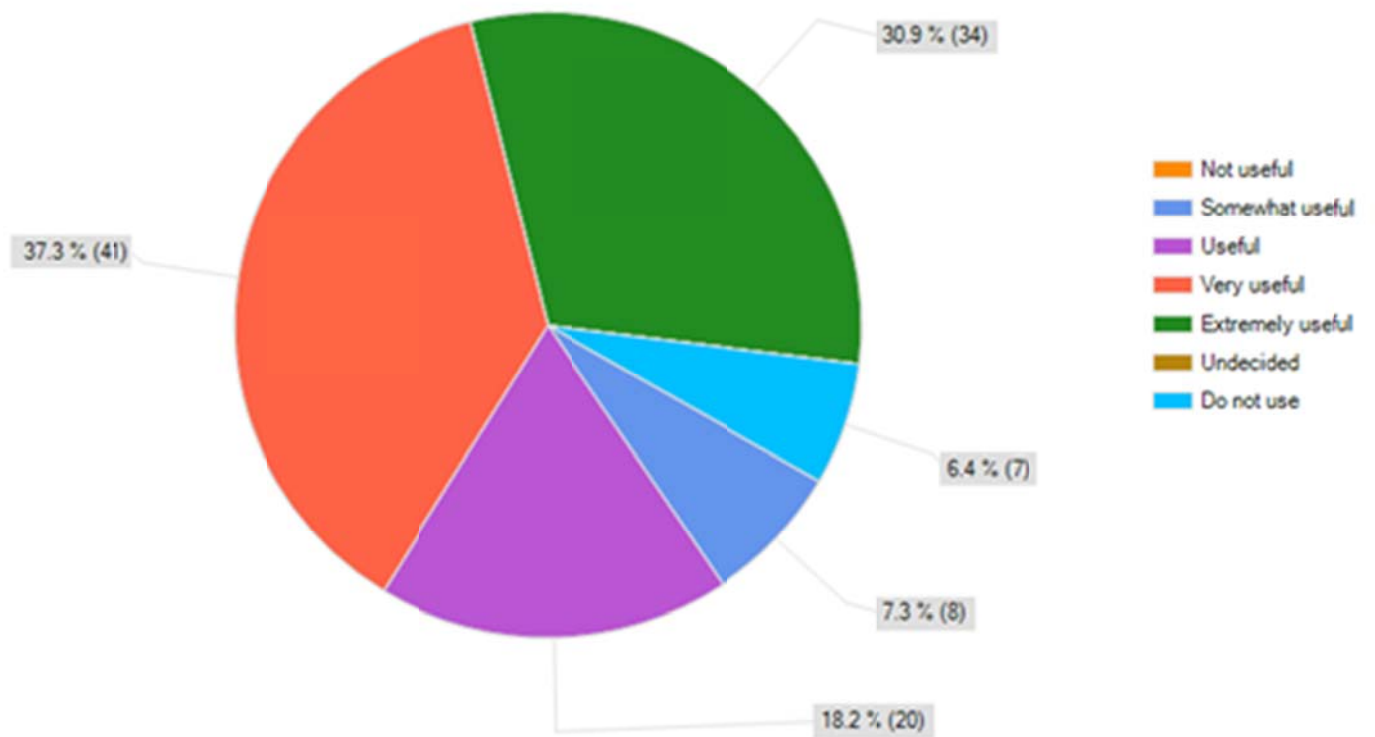
Do patrons at your library use library computers to download free Talking Book Library Braille and Audio Reading Download (BARD) books or magazines?



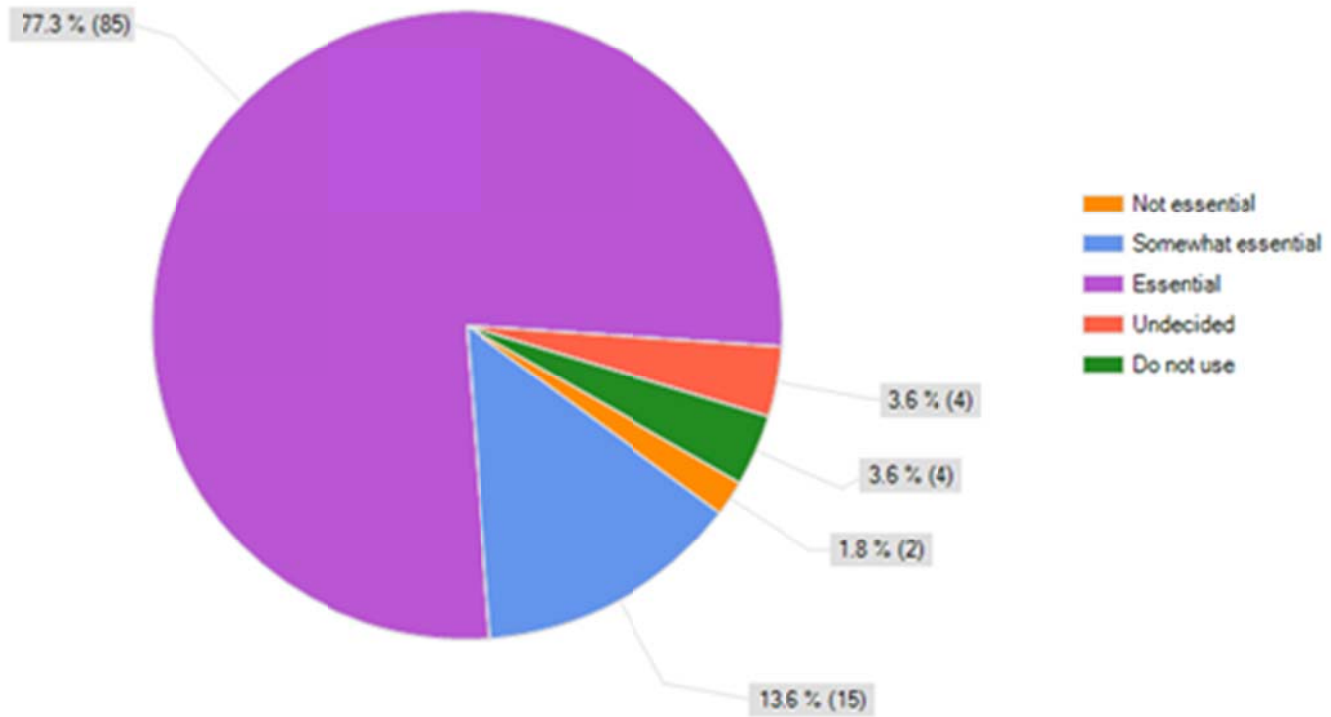
How many MSL training events have you attended in the last three years?



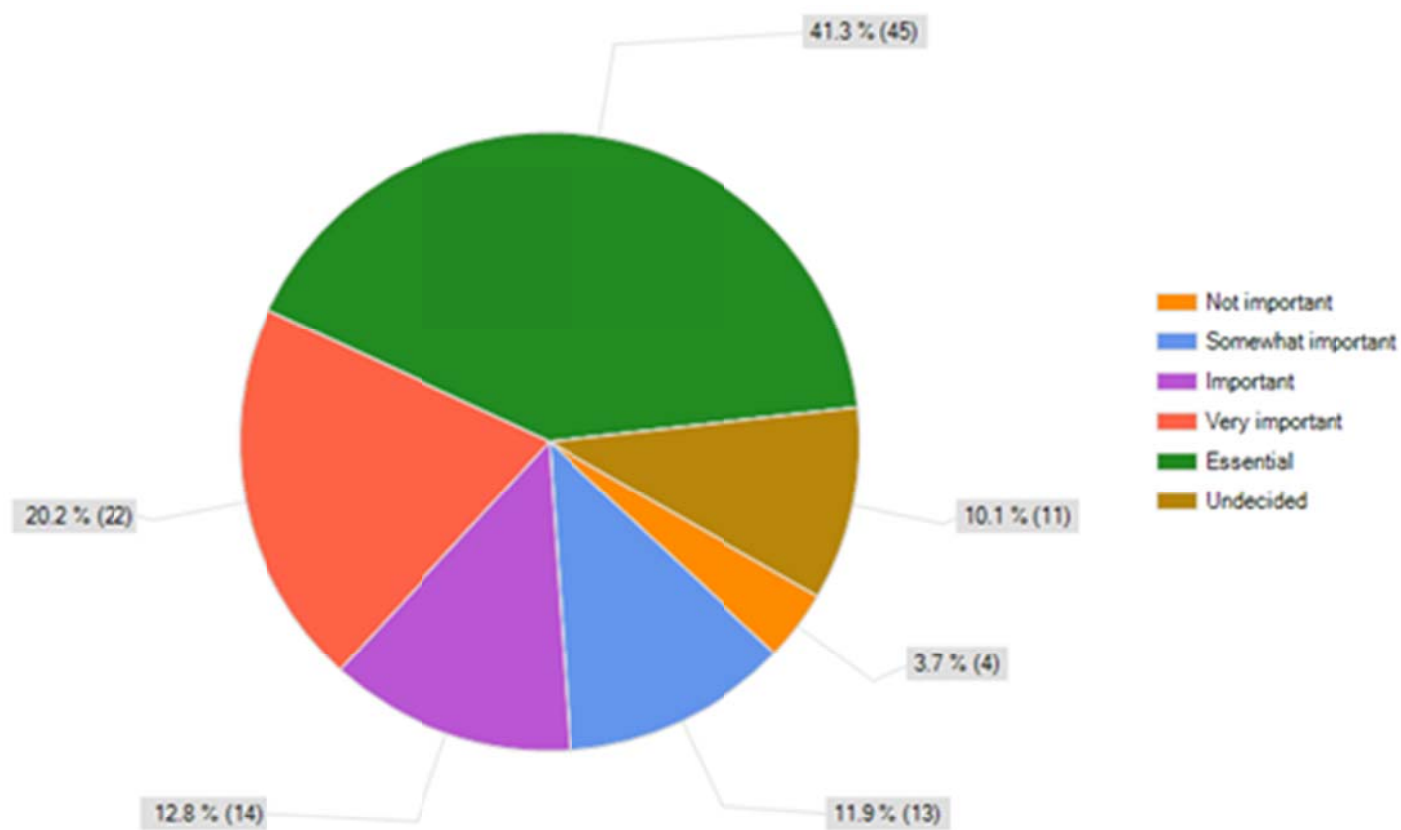
Please rate the usefulness of training from the Montana State Library.



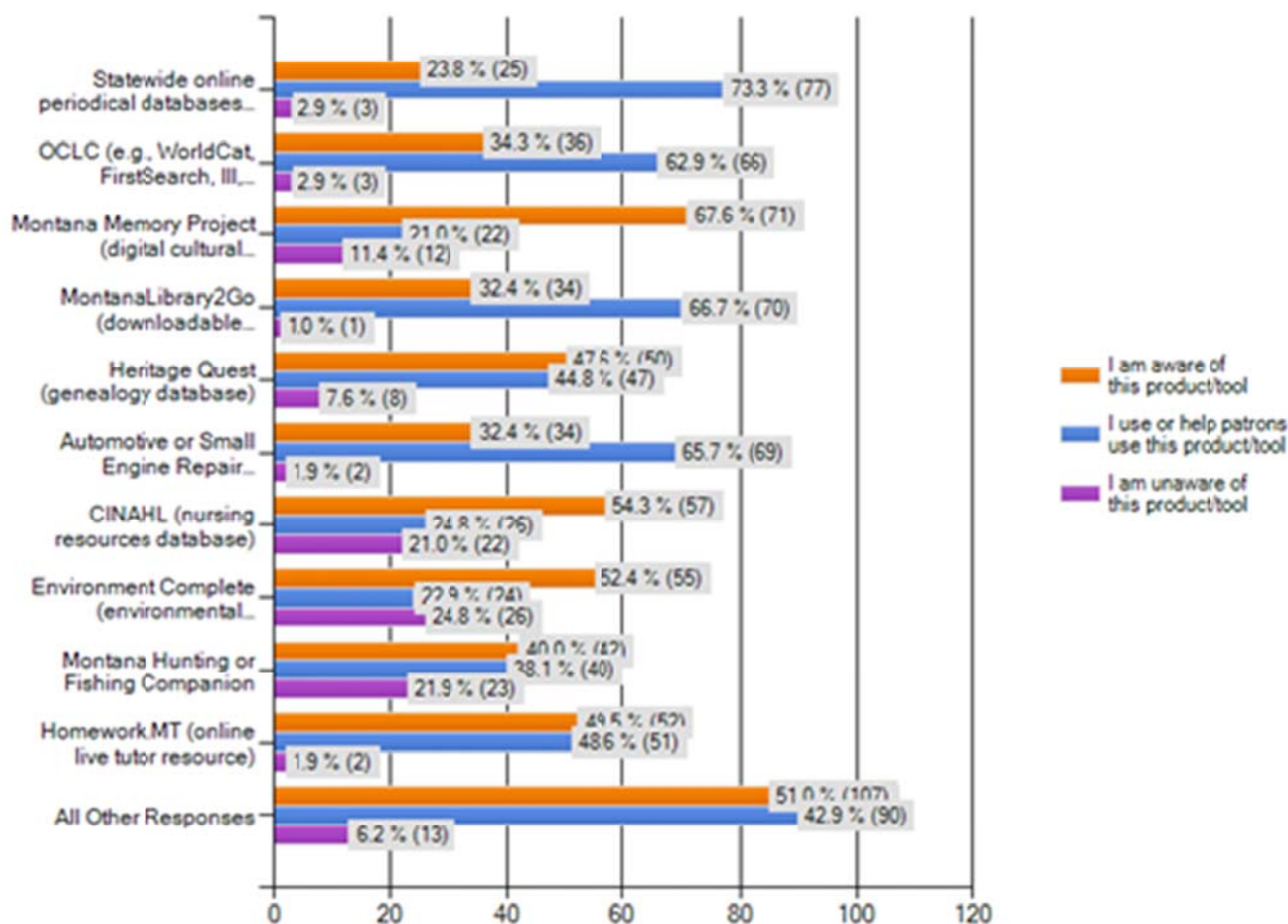
How essential is the training provided by Montana State Library?



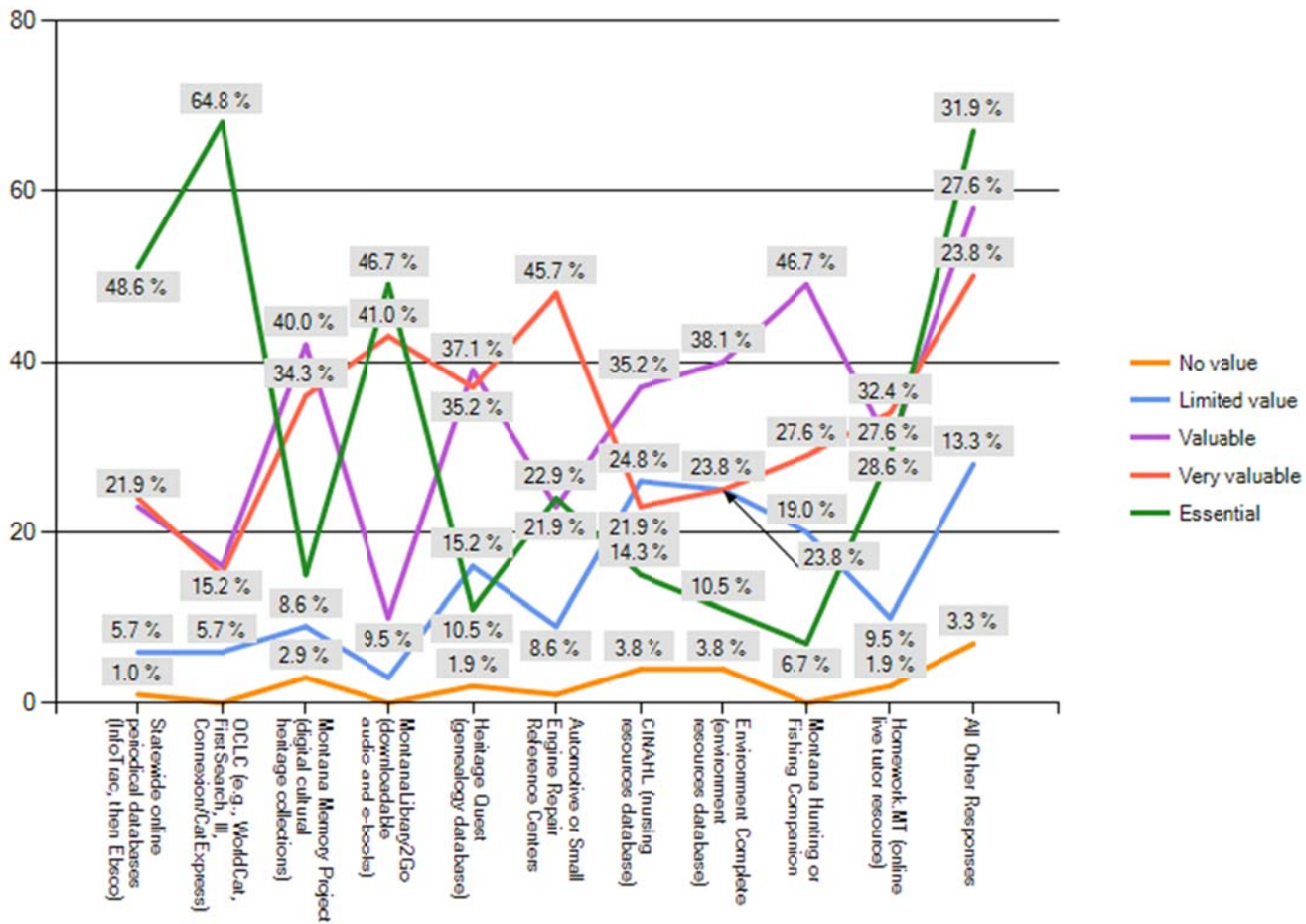
How important is the Montana Shared Catalog for library users?



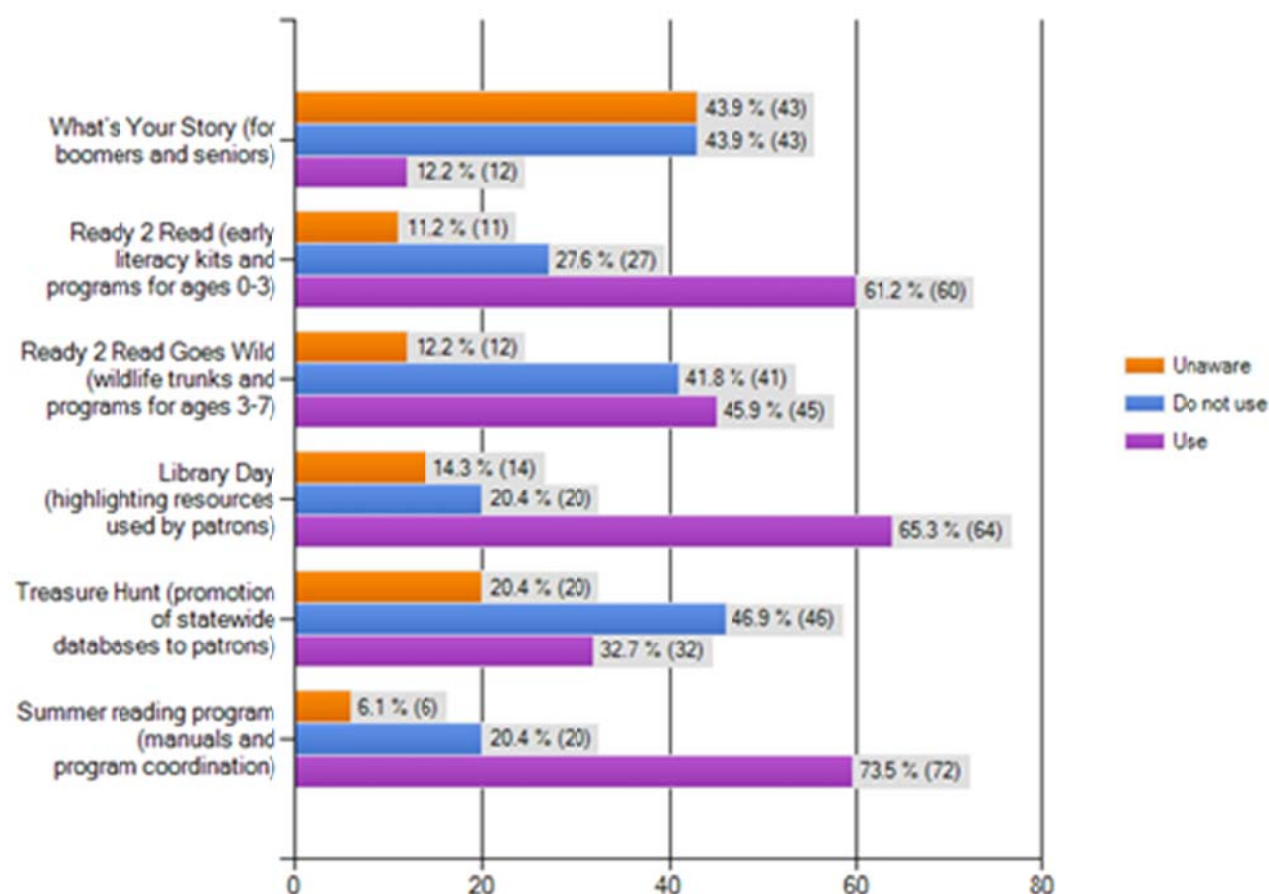
Please check the appropriate response for each tool and product.



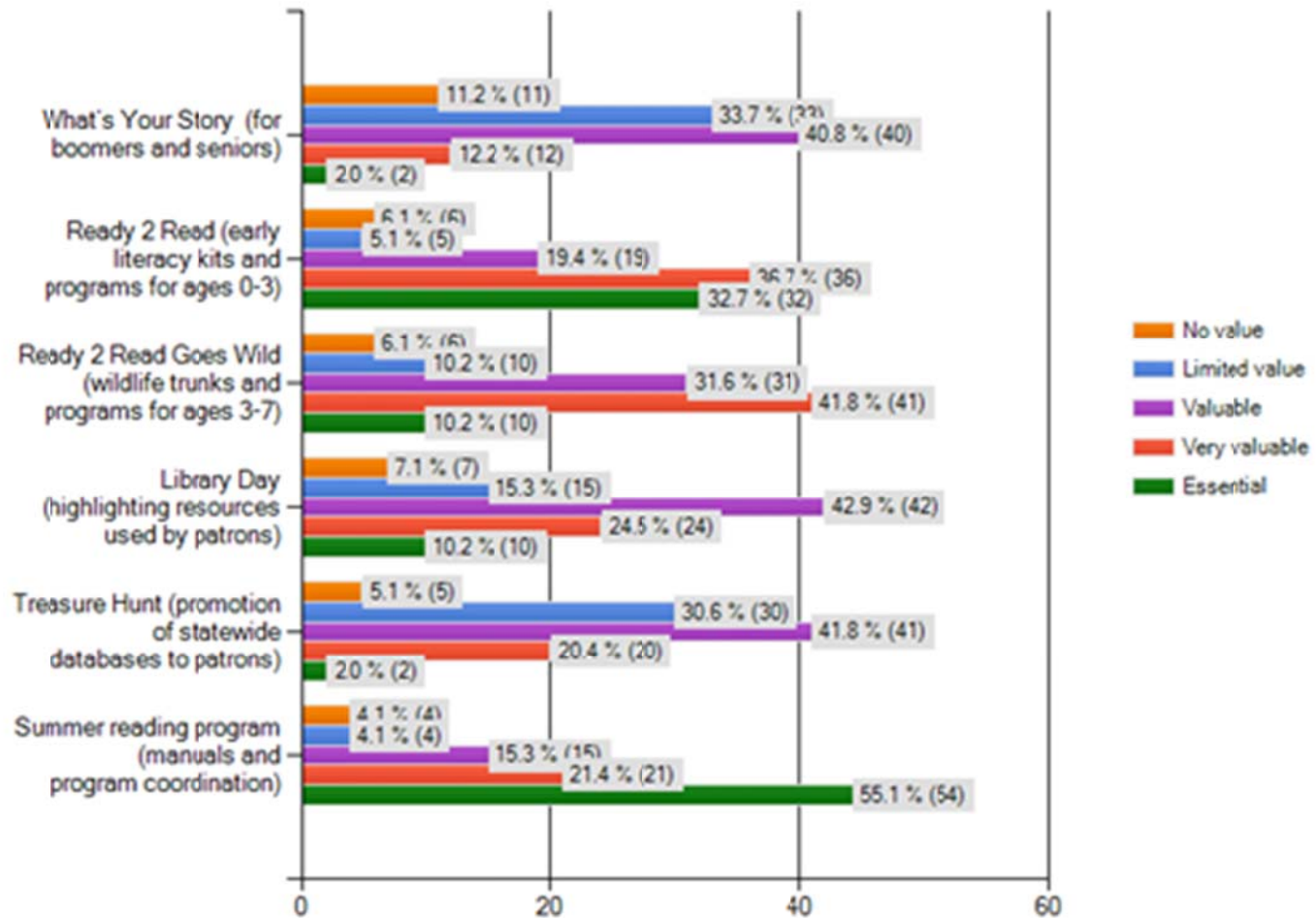
Please check the appropriate response for each product and tool.



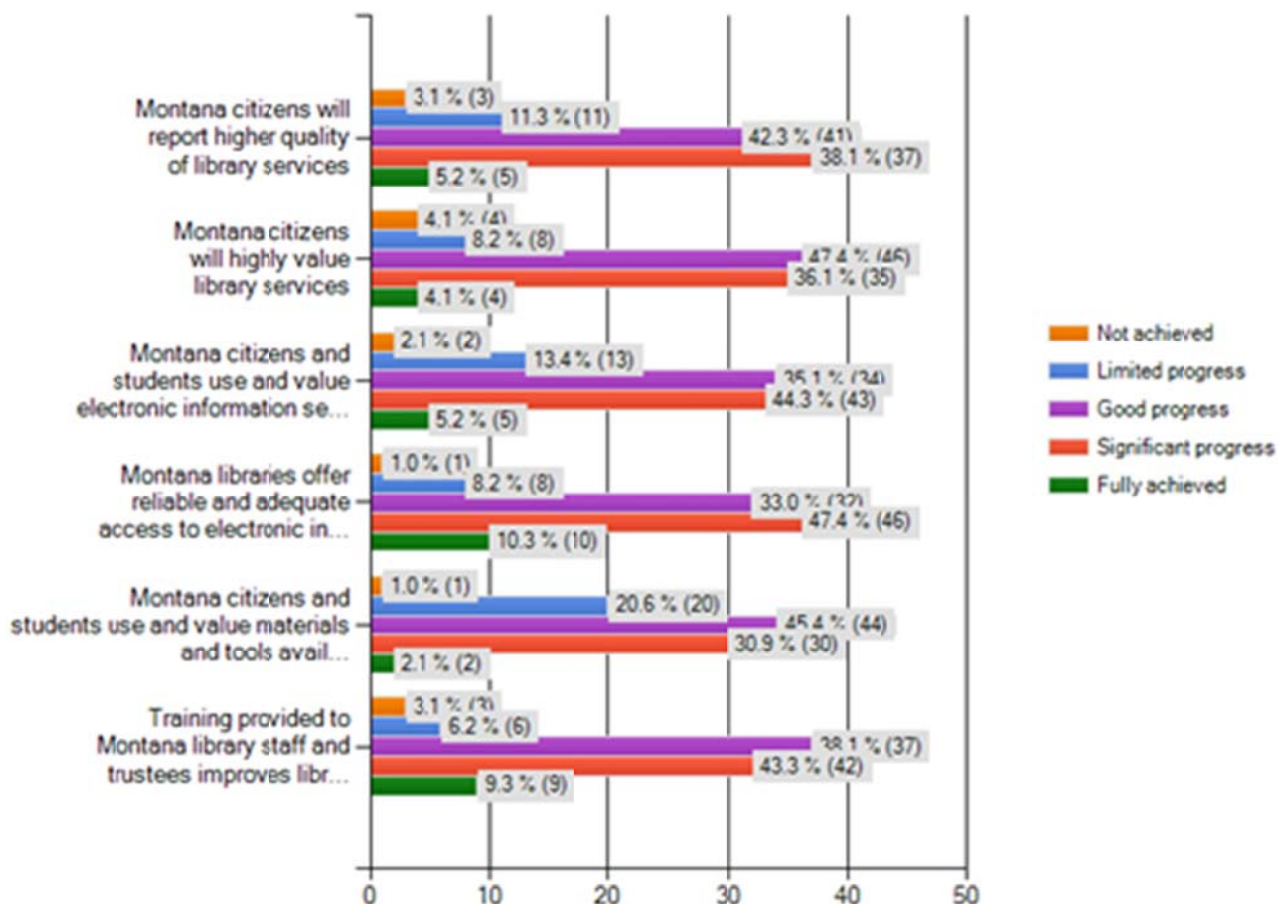
Please check the appropriate response for each of the program/materials listed.



Please check the appropriate response for each of the programs/materials listed.



Key outcomes for the use of LSTA funds in Montana are given below.
Please indicate the degree you feel these outcomes have been achieved?



II. Talking Book Library Patron Interview Script

1. Which of these best describes the Montana Talking Book Library program?

No Value__ Limited Value__ Valuable__ Very Valuable__X__ Essential__

2. Please share your experience with the following Talking Book Library services:

- a. Collection: digital, cassette or downloadable books and magazines, local Montana audio books and magazines, interlibrary loan of audio books from out of state Talking Book libraries.
- b. Delivery of services: USPS, phone and electronic access (internet download such as BARD (Braille and audiot reading download(or WebBraille (downloading books or magazines) or internet access to WebOpac catalog)
- c. Equipment: digital, cassette or other
- d. Customer Service: staff assistance in book/magazine searches, troubleshooting electronic

3. How could the Talking Book Library serve you better?

4. What library service would you like Talking Book Library to offer that they currently do not?

5. What Talking Book Library service do you use the most?

6. What is the most important service Talking Books offers?

7. What is the least important service Talking Books offers?

8. How do the Talking Book Library services impact your quality of life?

III. Product Specific Surveys

A. Montana Shared Catalog Questions

1. Name of your library:
2. How do you use the library's online catalog? Please check all that apply.
3. Do you access the library's online catalog from home, work, school, etc.?
4. Please check all of the features you currently use that are available on your library's online catalog.
 - Placing holds/reserves on library materials
 - Renewing a checkout
 - Booklist or reading suggestions
 - Mobile applications
 - Email notifications for holds and overdues
 - Other features (please describe)
5. Please rate the library's online catalog for each of the issues listed below.
 - Accessing the catalog
 - Reliability of the catalog
 - Convenience using the catalog
 - User friendliness of the catalog
 - Meeting your information needs
6. In your opinion, has the library's online catalog improved library services?
7. What do you like best about the library's online catalog?
8. What improvements would you suggest for the library's online catalog? If nothing, please indicate this.

B. MontanaLibrary2Go Questions

1. Name of your library:
2. Do you use your library's downloadable e-books?
3. Do you use your library's downloadable audiobooks?
4. Do you download audiobooks or e-books from outside the library (from home, work, school, etc.)?
5. Please rate MontanaLibrary2Go for each of the issues listed below.
 - Accessing the collection
 - Searching the collection
 - Downloading from the collection
 - Convenience using the collection
 - User friendliness of the collection
 - Meeting your reading needs
6. In your opinion, has MontanaLibrary2Go improved library services?
7. What do you like best about MontanaLibrary2Go?

8. What improvements would you suggest for MontanaLibrary2Go? If nothing, please indicate this.

C. Montana Memory Project Questions

1. Name of your library:

2. How do you use the Montana Memory Project digital collection? Please check all that apply

For photographs

For documents (letters, legal materials, financial records, etc.)

For historical newspapers

For local history

For family history

For maps

For research

Other (please describe

3. Please rate the Montana Memory Project for each of the issues listed below.

Accessing the collection

Reliability of the collection

Convenience using the collection

User friendliness of the collection

Meeting your information needs

4. In your opinion, has the Montana Memory Project improved library services?

5. What do you like best about the Montana Memory Project digital collection?

6. What improvements would you suggest for the Montana Memory Project digital collection?

If nothing, please indicate this.

IV. Focus Group Scripts (To be delivered in a extemporaneous manner)

A. Librarian Focus Group Format and Script

Preamble: We very much appreciate everyone taking time out of busy schedules to be here this morning. I think everyone has a pretty good sense of our purpose here, but we just wanted to clarify that our firm is conducting an exhaustive survey on behalf of the Montana State Library for the purpose of evaluating services associated with the Library Services and Technology Act. We have this room scheduled for about 2 hours, and then we will have a lunch to wrap things up. So I know we have a lot of expertise and experience assembled with this group, and although you all probably know one another to some extent (I know we have different organizations represented here), so just a quick introduction of yourself and what it is you primarily focus on in your duties (and anything else you want to tell us about your background in library sciences).

So we are going through the series of statewide projects that are funded by LSTA, and to put some structure to these we are going to use some similar categories for each one. So while we have some structure here, for all of you it is far more important to be able to talk about exactly what you want to; our role is going to be more of really transcribing with as little moderating as possible, and try to make this as informal as possible.

I think a good way to begin is simply to ask the group which LSTA activities and tools do you use:

- Talking book library
- MSL sponsored training
- Montana Shared Catalog
- Statewide online periodical databases (infoTrac, then Ebsco
- OCLC (e.g. WorldCat, FirstSearch, III, Connexion, CatExpress)
- Montana Memory Project (digital cultural heritage collections)
- Montana Library2Go (downloadable audio and ebooks)
- Heritage Quest (genealogy database)
- Heritage Quest (genealogy database)
- Automotive or small engine repair reference centers
- CINAHL (nursing resources database)
- Environment Complete (environmental resources database)

- Montana Hunting or fishing companion
- Homework.MT (online live tutor resource)
- Montana Library Directory
- Montana Courier pilot (materials moved between libraries by a courier service)
- What's your story (for boomers and seniors)
- Ready 2 Read (early literacy kits and programs for ages 0-3)
- Ready 2 Read goes wild (wildlife trunks and programs for ages 3-7)
- Library Day (highlighting resources by patrons)
- Treasure Hunt (promotion of statewide databases to patrons)
- Summer reading program (manuals and program coordination)

We know that for some of these you may use them almost daily, whereas in other times it is a rare use because much of this will be driven by patron needs and interests. So we don't want to give a slight to something that may not be used by the general public, but is critical to a specialized segment of the community. But in general, some discussion on general thoughts...

1. General thoughts (convenience, quality, frequency of use)
2. What are the benefits to library patrons and the public in general? Does this activity target a specific group of people or type of patron? (Visual, physical, or reading disabilities?)
3. Are there limitations/problems (barriers to success) to one of these activities?
4. What recommendations would you make to improve either the quality or preferential outcomes of any of these tools or activities?
5. Is this a activity or tool that you are generally proud or excited to show to a new patron?

Continuing Education

Library Program Development

These two categories are somewhat interlinked, so we may be switching back and forth, but that is fine for our discussion today. A couple of prompts:

1. What types of training have you had? Face to face, webinars, etc? General thoughts on this training/continuing education? How easy are these trainings to access? Are there any barriers to accessing this training (either programmatic or internal, i.e. workloads)?
2. How has the consulting role of MSL been in professional and workforce development at your library?
3. Do you see any immediate use for professional skills developed in training for your daily responsibilities and patron interaction?
4. Has either consulting or training lead to constructive collaboration among other organizations in your area? What do you see as the general role of the MSL in library development (to include linking libraries electronically, program development and consulting, encouraging consortia and shared resources)?
5. How effective is this function by the MSL? Are there problems or barriers to success? Opportunities for improvement?
6. Can you identify an outcome or benefit to library users in your area that might not have been possible without developmental support from MSL?

Wrap-up and LSTA key outcomes

1. LSTA outcomes deal with Montana citizenry, your patrons, in the following areas. A general discussion on whether patrons are receiving higher quality of library services and patrons have an increase value in library services.
2. Any thoughts related to LSTA activities or tools that we haven't captured up here on the board? Clarifications?
3. What is the one (or two, maybe three) things that you feel need to be communicated in our report?
4. Any final thoughts/suggestions to the MSL on any of the subjects we touched on today?

B. Patron Focus Group Format and Script

Preamble: First of all we want to thank you very much for being here today and taking a little time to share your thoughts about the library. Our firm has been asked to gather information about library operations across the state and share that with the Montana State Library, and one of the key components is to talk about patron issues, what is working at your library, what could be improved etc. So this is very informal, but we can kind of get started here as people are finishing up a lunch snack. So (introductions from moderator), let's just go around the group and have introductions and get started.

Okay, so we are all library patrons, but we know that you can use the library for so many different reasons, and access so much information these days, so if we could maybe start off with some of the reasons you use the library, what you like about your local library, or how you got started as a library patron.

- Talking book library
- MSL sponsored training
- Montana Shared Catalog
- Statewide online periodical databases (infoTrac, then Ebsco
- OCLC (e.g. WorldCat, FirstSearch, III, Connexion, CatExpress)
- Montana Memory Project (digital cultural heritage collections)
- Montana Library2Go (downloadable audio and ebooks)
- Heritage Quest (genealogy database)
- Heritage Quest (genealogy database)
- Automotive or small engine repair reference centers
- CINAHL (nursing resources database)
- Environment Complete (environmental resources database)
- Montana Hunting or fishing companion
- Homework.MT (online live tutor resource)
- Montana Library Directory
- Montana Courier pilot (materials moved between libraries by a courier service)
- What's your story (for boomers and seniors)

- Ready 2 Read (early literacy kits and programs for ages 0-3)
- Ready 2 Read goes wild (wildlife trunks and programs for ages 3-7)
- Library Day (highlighting resources by patrons)
- Treasure Hunt (promotion of statewide databases to patrons)
- Summer reading program (manuals and program coordination)

General Discussion

1. What about the issue of convenience, what do you find convenient to use at the library? Inconvenient? Other thoughts?
2. How do you think your community might be different if residents did not have access to the types of resources and programs available at your library?
3. What recommendations would you make to improve either the quality any program or resource at your library?

Wrap-up and LSTA key outcomes

1. Any thoughts related to Library programs that we haven't captured up here on the board? Clarifications?
2. What is the one (or two, maybe three) things that you feel need to be communicated in our report?
3. Any final thoughts/suggestions to the MSL on any of the subjects we touched on today?