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ABSTRACT

This long range plan for the Montana State Library begins with an introduction that covers history, past planning activities, the planning process, ongoing planning, evaluation, demographic characteristics that influence the library services population, employment and education, income, taxes, needs of Montana libraries, needs of all libraries, public library needs, school library needs, special/institutional/college/academic library needs, LSCA (Library Service and Construction Act) transition to LSTA (Library Services and Technology Act), state advisory council, grants, the 1998 LSTA program, future years, expenditure of funds for administration, procedures for LSTA, and the vision of libraries in Montana. The second section covers the Montana State Library's approach to library development, including principles of library development and relationships with library and other organizations. Statewide library resources are addressed in the third section, including goals, objective, and activities related to developing and sharing resources, continuing education, public awareness and support, leadership for library development, and information services. Goals, objectives, and activities of the Montana Talking Book Library are presented in the fourth section. The fifth section summarizes goals, objectives, and activities for the Natural Resource Information System. (MES)

Montana State Library Long Range Plan

Introduction

HISTORY

An act of the 1929 Legislative Assembly created the State Library Extension Commission. In 1945, the first biennial budget totaled \$20,000 and allocated salary for a "Library Secretary" and an "assistant." In the same year, the Montana State University in Missoula offered a large room to the Commission for use as their headquarters. The Montana State Library (MSL) moved to Helena in 1965 and in 1968 added a regional library for the blind and physically handicapped. In 1982, the State Library moved to the State Library- Justice Building on the Capitol complex. An act of the 1985 legislature established the Natural Resource Information System (NRIS) at the State Library.

Past Planning Activities

Throughout the past thirty years, the State Library has been involved in many planning activities. In 1965, Ruth Warncke, a professor at Case Western Reserve University, published a plan for the Development of Library Service in Montana. This plan set the stage for the development of the federation system. Other studies that followed included the Joe Matthews study, "Resource Sharing in Montana," a study of interlibrary loans by the Economic Consultants Northwest, and a study of the federation structure by the Blue Bear Group.

Recent planning activities include mission statements from the Library Commission (Blacktail, Bear Creek, and Pine Butte Mission Statements). A Blue Ribbon Panel on Libraries at Risk and the Library Futures Task Force Meetings also addressed long range planning for Montana's libraries. The requirements of the Library Services and Construction Act (LSCA) also spurred planning activities, including the annual plan for LSCA that was last updated in 1995.

Planning Process

The current plan fulfills two purposes -- the requirements of the new LSTA and an operational plan for the State Library.

The planning process involved both the external constituents of the State Library as well as its staff. In the fall of 1996, State Library staff solicited opinions from the library community about future library development goals and activities of the State Library. Using this information, staff wrote a first draft which they sent to the library community for further comment. Also making comments on the draft were members of the State Advisory Council, six of whom are library users. Based on these comments, the first

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draft was revised and a second round of comments was solicited.

The internal planning process took place on the program level. Each program developed its own process to involve staff in creating their plans for the next five years.

The outcome of both external and internal processes is a comprehensive agency plan that the Library Commission approved on June 18, 1997.

Ongoing Planning

A continuous assessment of activities and revisions to the plan are critical for the success of the State Library. The Commission and the Advisory Council will review the plan yearly to make necessary modifications. As an ongoing part of the revision cycle, the MSL will ask for comments from the library community and library users.

Evaluation

The ongoing planning process must include evaluation of past efforts. The MSL evaluation process will include the following interrelated components:

1. At an annual meeting, the Commission will evaluate the achievement of the plan's objectives. The Commission will evaluate both the process by which the objectives were or were not met, and the impact of meeting or not meeting the objectives. The Commission will solicit public comment on the implementation of the plan through Federation meetings and other statewide venues.
2. Grant recipients will evaluate all LSTA projects according to an evaluation design based on the objectives of the proposal and consistent with the goals and priorities of the State Plan. The Council and the Commission will also annually evaluate the projects and the LSTA program.
3. In 2001, the State Library will contract with an outside evaluator to conduct an independent evaluation of the five-year plan. MSL will submit all yearly and the five- year evaluations to the Director of the Institute of Museum and Library Services.

All evaluations will strive to use information from the users of library programs. Furthermore, the State Library will distribute the original plan, any annual modifications, and annual evaluation reports widely through print and electronic publications. These documents will be announced in the agency's newsletter and on the Wired Montana librarians' listserv. The plan itself will be posted on the MSL website and print copies will be made available upon request.

Demographic Characteristics that Influence Library Services Population

On July 1, 1995, Montana's population numbered 870,281-- an 8.9% increase in population from 1990. Although Montana is the fourth largest state in size, it is one of most sparsely populated states at 17 persons per square mile. Twenty-seven percent of Montana's citizens are under the age of 18; 50.8% are ages 18 to 54; and 21.9% are ages 55 or over. Ninety-three percent of Montana's citizens are White. American Indians make up almost 6% of the total population.

The rate of growth for the total population is projected to be .8 percent annually as compared with 1.8 percent per year during 1990 to 1994. This decrease in the population growth rate may be due to increased housing prices.

Montana's sparsely dispersed population may hinder library cooperation when libraries are located far from others. On the other hand, remoteness can also engender local cooperation among different types of libraries in a community. Isolation can also spark realization of how resource sharing and cooperation are necessary to provide quality library service.

Employment and Education

Almost 34% of Montana citizens have graduated from high school, and 19.8% have achieved a bachelor's of arts or a higher degree. Almost 28% of adults have attended some college and 19% did not complete high school.

Library use is positively correlated with the level of education achieved by an individual. In Montana, about half the population has some college education; thus, suggesting a possible moderate level of library use among Montana citizens.

At the end of 1995 Montana's unemployment rate was 5.6%. Sixty-two percent of the civilian population is employed and only 6.6% are employed in manufacturing compared with the national percentage of 15.8. The average median pay of a Montana worker is \$20,218 or 75% of the national median.

Economists project 40,000 new jobs for Montana between 1994 and 2000 - a 2% growth rate. Most of this growth will be in the services-producing segment of the economy which includes health and social services, eating and drinking establishments, and public and private education services. The rest of the growth will be in the goods-producing segments. Jobs in nondurable goods manufacturing and production agriculture are expected to decline.

Income

Montana's total income in 1995 was only 81.1% of the nation's average. The median personal income per capita in 1995 was \$17,185 compared with the national median of \$21,188. The percent of population below the poverty level in 1994 was 11.5% compared with the national percent of 14.5. Montana has 145,953 Social Security recipients as of December 1993 and retired workers number 87,634.

Public library use is correlated positively to middle and higher income averages. Because Montana's personal income is lower than the national average, library use can be predicted to be lower than the national average.

Taxes

Montana's public libraries are primarily funded by local property taxes. Taxes are the subject of perennial debate in Montana although Montana's overall tax burden is about average among the states. Montana's revenue mix is quite different from other states because Montana does not impose a sales tax. The natural resources boom of the 1970's boosted local and state revenues and eased the tax burden on property owners. However, since 1985 residential property taxes have increased as natural resource taxes decreased and property values increased.

The 1997 Legislature passed a property tax freeze and directed a legislative committee to study the property tax issue. The impact of the freeze on Montana's libraries is not yet known. However, libraries will have to make unpleasant choices as they face increased demands with static or decreased budgets.

A Snapshot of Montana's Libraries

Public Libraries	
Type	Number
City/County	14
City	36
County	28
School/Public	4

Total Operating Expenditures	\$9,895,806
Total Holdings	2,567,020
Total Circulation (1994-95)	5,105,852

Academic and Libraries		
Type	Number	Most Recent Total FTE Enrollment
Private	6	3,684
Public	22	35,342

Institutional Libraries		
Type	Number	Residents
Correctional Facilities	4	1453 without Pine Hills
Human Services	6	704 without Boulder

School Libraries	
Total	447

Special Libraries	
Type	Number
Government Libraries	12
Medical Libraries	16
Other	13

Needs of Montana Libraries

The Montana State Library assesses library needs on an ongoing basis, both informally through discussions with members of the library community and formally through periodic surveys. A major need continues to be adequate resources such as staff, training, information sources, equipment, and facilities to meet the growing information needs of the people of Montana and to effectively use the range of traditional and technological service options available.

Needs of All Libraries:

The State Library has identified certain needs as the responsibility of the local library, including adequate staff, general staff development, collection, and maintenance of technology. Other needs can be addressed effectively through programs that are consistent with the purposes of LSTA, including:

- Access to more information in electronic format
- Training related to the selection and use of electronic formats for both staff and patrons
- Better and more comprehensive materials delivery systems
- More Montana catalogs available electronically and remotely
- Reciprocal borrowing agreements with other Montana libraries
- More collaboration among libraries, and with other organizations and agencies in both planning and providing information services
- More public awareness of library services and their benefits
- Better delivery of information services to individuals with special needs

Public Library Needs:

- Public libraries in Montana have the mission to serve everyone in their communities. Though the state does not have a large unserved population, many Montanans are nonetheless under served in terms of library services. In addition, the staff of eighty percent of Montana's public libraries does not have professional library education or training. Because statewide programs cannot be fully implemented due to these facts, Montana has the following needs for public library services that are consistent with the purposes of LSTA:

- Consolidation of existing jurisdictions into districts with a tax base large enough to support good library service
- Electronic linkages among local libraries of all types
- Participation in continuing education programs
- Support development of additional resources

School Library Needs:

Library services in most of the state's 460 public school districts are declining. Many elementary schools do not have libraries, and most are not staffed by people trained in school library services. Most school libraries are not participants in resource sharing because they do not have their holdings available to other libraries, and do not make their collections available outside school hours. School districts have received state funding for technology, but often the school library and its staff have not been actively involved in the technology projects.

The Montana State Library has no official responsibility for school library services, but continues to collaborate with the Office of Public Instruction staff to identify ways to increase the visibility and improve the services of school libraries. Montana has the following needs for school library services that are consistent with the purposes of LSTA:

- Better access to their collections, both physically and electronically
- Access to more information in electronic format
- Active participation in local and state resource sharing
- Participation in continuing education programs
- Support development of additional resources

Special, Institutional, College and Academic Library Needs:

The State Library works cooperatively with the many special, institutional, college and academic libraries in the state. The following needs have been identified for these Montana library facilities that are consistent with the purposes of LSTA:

- Access to more information in electronic format
- Better access to specialized collections, including electronic access
- Participation in cooperative networks and state resource sharing activities

- Participation in continuing education programs
- Support development of additional resources

LSCA Transition to LSTA

In 1956, Congress passed the Library Service Act. This Act, subsequently renamed the Library Service and Construction Act (LSCA), provided funds for public library development and construction. On September 30, 1996, Congress passed and the President signed an Act which authorized the restructuring of the LSCA into the Library Services and Technology Act (LSTA).

LSTA extends certain provisions of the LSCA for library programs concerning services to special populations, expands the emphasis on technology, and encourages resource sharing and cooperation among libraries.

The new legislation emphasizes the following areas:

- **Technology, Networking, and Resource Sharing:**
 - Establishing or enhancing electronic linkages among libraries
 - Electronically linking libraries with educational, social, or information services
 - Assisting libraries in accessing information through electronic networks
 - Encouraging libraries in different areas, and encouraging different types of libraries, to establish consortia and share resources; or
 - Paying costs for libraries to acquire or share computer systems and telecommunications technologies
- **Targeting Library and Information Services to Special Groups, including:**
 - Persons having difficulty using a library
 - Under served urban and rural communities
 - Children from families with incomes below the poverty line

State Advisory Council:

The Commission created the first State Advisory Council in the early 1970's. The new LSTA does not require an advisory council. In the Spring of 1997, the Council and Commission discussed the restructuring of the Council. The result of these discussions was a change in membership and in mission for the Council. The Montana State Library Services Advisory Council will "advise and make recommendations to the Montana State Library Commission on the development, evaluation, and funding of the LSTA program and other pertinent issues that may relate to or affect LSTA."

Grants:

Throughout the past 31 years, the Montana State Library has used the federal library program to fund statewide services at the State Library and local projects through both competitive and noncompetitive grant programs. The citizens of Montana have benefited from the LSCA program through training programs for librarians and trustees, support for resource sharing, conversion of records to machine readable format, and many other local and state projects.

1998 LSTA Program:

The Council recommended to the Library Commission that the State Library use 1998 LSTA funds to support certain State Library Programs, such as the Talking Books Library, to hire two technology consultants, and to provide funds and assistance to public libraries that are not connected to the Internet.

Future Years:

The Long Range Plan contains broad directions for the use of LSTA funds until the year 2002. The Library Commission will further define these broad directions with recommendations from the Advisory Council and the Networking Task Force.

Expenditure of Funds for Administration:

As authorized in the LSTA, state libraries may expend up to 4% of federal funds for administrative costs concerning LSTA programs and activities. The State Library will use these funds to complete the following:

1. Manage LSTA programs and activities
2. Provide accountability, both program and financial for LSTA administration
3. Fund the business of the Library Services Advisory Council
4. Evaluate the LSTA results

The State Library will provide the following publications as part of the administration of the LSTA.

1. Five-year Plan
2. Yearly modifications to the plan
3. Yearly evaluations

Procedures for LSTA:

LSTA funds will be distributed through a combination of competitive and noncompetitive grants. The amount, timing, and availability of funds for competitive grants will be determined by the Montana State Library in consultation with the State Advisory Council, the MSL Commission, and the Montana library community. Funds awarded on a noncompetitive basis will be reviewed by the staff of the MSL with the advice of the Advisory Council. The MSL Commission will make final decisions on all grant awards.

The MSL will use procedures similar to those used for the LSCA program. Information on the availability of LSTA funds will be widely distributed through regional and state publications, direct mailings to libraries, and other appropriate channels. Information will include specific data for each grant offering including application forms, information booklet, eligibility, schedules, procedures, criteria for evaluation, and the appeal process.

Funds awarded on a competitive basis will undergo a review process. Reviewers will receive training from appropriate MSL staff and will be drawn from staff and appropriate representatives of the library community. Reviewers will rank and rate grant applications according to established criteria. Funding recommendations and other information will be forwarded to the Advisory Council to make recommendations to the MSL Commission for final consideration and action. A process for applicants to appeal decisions is in place.

Vision of Libraries in Montana

Montana citizens have equal and easy access to quality library services without restriction or censorship or the violation of privacy. Every citizen depends on, values, and supports continued and enhanced library services. In Montana, library workers receive respect and recognition for their skills and abilities.

Montana's libraries are integral components of their communities and design library services by consulting citizens to understand community needs. The library staff and the governing officials promote library services in all settings. Each community supports its library through sufficient tax support or institutional appropriations.

Libraries cooperate with other libraries and organizations to strengthen services by sharing material resources and professional expertise. Each library accepts a role in improving library services on the state, regional, and national level.

Montana State Library's Approach to Library Development

Principles of Library Development

The Montana State Library (MSL) works to improve library services and administrative skills by providing consulting and continuing education opportunities to library workers and trustees. Through its services, the MSL strives to increase the self-sufficiency and strength of each library. Whenever possible, the MSL focuses on empowering librarians and trustees to respond directly to problems and opportunities.

We believe that each library requires a threshold financial base to provide adequate services. The MSL helps communities and institutions achieve this base locally. In addition, we advocate for increased State and Federal library funding. However, the MSL believes that such funding must not supplant tax or other ongoing support from local sources.

To supplement base funding, all public, school, academic, and special libraries in Montana are eligible for LSTA grant award monies to be used for special projects. The selection of grant awards is based on the criteria established annually by the Montana State Library Commission.

We believe that Montana citizens can benefit when libraries cooperate with other libraries and organizations to build programs and share resources. Therefore, the MSL will take a leadership role in establishing such cooperative endeavors.

Diversity characterizes Montana's libraries which differ in size, roles, and in the services needed from the MSL. Eighty percent of public libraries are not directed by a librarian with a professional education. Generally, these libraries require more consulting assistance and technical support than libraries that have enough revenue to employ a professional librarian.

Relationships with Libraries and Other Organizations

MSL has distinct relationships with and levels of responsibilities to different types of libraries.

State Government - The MSL supplies work-related library and information services to state employees. MSL coordinates its services with the library programs of other state agencies.

Federations - The MSL Commission administers the state appropriations for Federations, establishes rules for their operations, and evaluates their programs.

Public Libraries - The MSL is responsible, along with local boards, for the development of local public library services. These responsibilities include voluntary certification of

public library personnel, direct state aid to public libraries, the administration of LSTA funds, consulting, and providing continuing education opportunities. The MSL also provides back up reference services and interlibrary loan services to public libraries.

School Library Media Centers (SLMC) - The MSL recognizes that the Office of Public Instruction (OPI) and the Board of Public Education have the responsibility for establishing and enforcing accreditation standards for SLMCs and for providing state level funding for SLMCs. The MSL also believes that the OPI has the primary responsibility for encouraging SLMC development. However, the position of education media supervisor in the Office of Public Instruction has not been funded during the last few years.

Therefore, besides our responsibility to include SLMCs in multitype resource sharing programs, the MSL will attempt to support school libraries, as resources allow, including offering interlibrary loan, reference, and continuing education. The MSL will encourage OPI to resume providing for the needs of SLMCs.

University and College Libraries - The MSL welcomes the participation of post-secondary libraries in cooperative networks, resource sharing, and continuing education programs.

State Institutional Libraries - The MSL recognizes that these libraries serve Montana citizens who have special needs for library services. The MSL supports these libraries by offering consulting assistance and encourages their participation in cooperative networks, resource sharing, and continuing education programs.

Special Libraries - The MSL encourages the participation of special libraries in MSL networking, resource sharing, and continuing education programs. The resources of special libraries are important to serve the information needs of Montana citizens.

Statewide Library Resources (SLR)

MISSION

To provide leadership, reference and information services, and resources to support Montana State Government, Montana libraries, and Montana citizens who wish to use State Library services.

Presented below are the projected goals, objectives, and activities for the Statewide Library Resources (SLR) program for the next five years. Funding of the program during this period will come from state monies and from LSTA grant awards. In the following outline, the emboldened goals, objectives, and activities are those which are directly linked to the LSTA and by which the MSL will carry out the purposes of the act.

LIBRARY DEVELOPMENT

Developing and Sharing Resources

GOAL 1: All Montana citizens have direct access to information through telecommunications at their libraries.

Objective 1.1. The Montana State Library (MSL) will seek broad-based support and use information from many sources when planning to improve and enhance the delivery of electronic library services.

Activity:

4. By July 1997, MSL will appoint a Networking Task Force that will suggest directions to achieve the following goals and objectives. MSL will provide technical assistance and support to the council.

Objective 1.2. By December 1998, all Montana public libraries will have either direct or dial-up access to the Internet.

Baseline: Currently 50 public libraries have access to the Internet.

Activities:

5. Using Library Services and Technology Act (LSTA) funds, MSL will hire two additional technology consultants.
6. Using LSTA funds, MSL will provide 51 public libraries that are not connected to the Internet with assistance, equipment, software, and one-year of telecommunications costs.

7. The Networking Task Force will evaluate the current Internet Access Project and suggest changes to its architecture and funding to the Commission by March 1998.

Objective 1.3. The MSL will facilitate efforts to have all Montana public libraries declared eligible for telecommunication discounts from Federal and State governments.

Activities:

4. MSL will work with libraries to write and have approved technology plans that qualify the library for discounts.
5. MSL will collaborate with state, federal, and other interested parties to facilitate the use of discounts in public and school libraries.
6. MSL will coordinate statewide publicity and education endeavors related to these discounts.

Objective 1.4. Increase librarians' and trustees' understanding of the use of technological resources in libraries.

Activities:

1. All library staff and trustees will have the opportunity to attend semiannual workshops on electronic reference services. One workshop will offer information on basic services while the other will focus on advanced services or emerging technologies.
2. Beginning in 1998, MSL, with the participation of the Networking Task Force, will offer a "Technology Boot-Camp" for library staff funded by LSTA. MSL and the Task Force will evaluate this activity to determine its continuation.
3. SLR, with the participation of the Networking Task Force, will identify library access coordinators, who will help their nearby peers with networking and automation projects, and provide local opportunities for training.

Objective 1.5. By July 1998, 25% of school libraries, 70% of public libraries, and all academic, college, and special libraries will offer full-text, electronic periodical databases.

Baseline: Current statistics from the MSL periodical online subscription cooperative arrangement list 37 of 447 or 8.3% of school libraries; 15 of 82 or 18.3% of public libraries; 5 of 28 or 17.8% of academic and college libraries; and 4 of 41 or 9.8% of special libraries offering these databases.

Activities:

1. In 1997, MSL will coordinate the purchase of two statewide licenses to such databases and devise a preliminary cost-sharing strategy.
2. The Networking Task Force will suggest expansions of the project and refine cost-sharing strategies.

Objective 1.6. By December 1999, Montana citizens will be served by at least 16 regional networks of multi-type libraries. These networks will share information electronically and through other document delivery systems.

Baseline: Currently Sidney, Libby, Billings, Hardin, and Havre have such networks. All 82 Montana library jurisdictions can join with other types of libraries in their area to improve services in their communities.

Activities:

1. The Networking Task Force will adopt guidelines for governance and suggest legislative endeavors to enable such networks.
2. The Networking Task Force will identify areas of Montana that would benefit from the establishment of a network. Library consultants will promote the projects to decision-making bodies and work with local constituents to plan and carry out the networks.
3. The Task Force will make a recommendation to the LSTA Advisory Council for the use of LSTA funding to support such networks in 1998.
4. In the 1999 Legislative session, MSL and the Montana Library Association (MLA) will advocate passage of appropriate legislation.

GOAL 2: Montana citizens will have timely access to information despite its location or format.

Objective 2.1. All Montana libraries will participate in the state interlibrary loan program and receive fair state subsidies.

Activity:

1. The Networking Task Force will study the state of interlibrary loans in Montana and make recommendations to the Law Revision Task Force and the State Library Commission regarding any statute changes, increases in funding, or administrative rule changes.

Objective 2.2. By 2001, all public, academic, and school libraries may send all of their interlibrary loans requests electronically.

Activities:

1. The Networking Task Force will draft an updated Interlibrary Loan code to include electronic processes.
2. Evaluate the use of a World Wide Web standard (Z39.50) interlibrary loan forms for transmitting all interlibrary loan requests.
3. Collaborate with Western Library Network (WLN) or other bibliographic utility to test any new product to replace current electronic interlibrary loan products.

Objective 2.3. By 2000, all academic and 50% of all public library catalogs will be available for searching through remote access.

Baseline: 20 out of the 28 college and university libraries and approximately 20 public libraries have catalogues that can be searched from a remote location.

Activities:

1. Evaluate the use of a World Wide Web site using Z39.50 standards to search and retrieve library materials, whatever the library's automation system.
2. Evaluate and advocate the use of shared and robust automated systems between various types of libraries within locales where this is logically, politically, and economically feasible.

Objective 2.4. Increase the ability of Montana's library workers to answer reference questions and to process interlibrary library loan requests locally.

Activities:

1. Train all public librarians in the use of LaserCat and Internet for reference and for interlibrary loan use.
2. Investigate sharing OCLC resources with librarians so that they may identify and seek interlibrary loans directly.
3. Identify and publicize any existing cooperation collection development agreements among holders of Montana's special collections or resources.
4. Develop electronic and printed information packets on the following subjects: Collection Management Policies; Budgeting, Statistics, Acceptable Use Policies, Cataloging, Children's Internet Services, Emerging Technology, Weeding, Reference Services, Interlibrary loan Grant writing, and Marketing.

Objective 2.5. MSL's consulting division reflects the needs of the State's libraries.

Activity:

1. Assess, identify, and make recommendations to the State Librarian regarding the number and type of consultative staff needed to respond quickly and accurately to all library requests.

Continuing Education

GOAL 3: Montana citizens are served by librarians and trustees who are knowledgeable about all aspects of library service.

Objective 3.1. By June 1998, MSL will offer Montana librarians and trustees a comprehensive, professionally planned schedule of continuing education options.

Baseline: MSL offers workshops intermittently.

Activities:

1. Convince the governor's budget office and legislators to include a new position of Continuing Education Coordinator in MSL's budget for FY 2000.
2. By the end of 1997, MSL will prepare and publicize a schedule of workshops for the upcoming year.
3. MSL will prepare and deliver two workshops using satellite technology.
4. By September 1998, MSL will evaluate satellite technology for delivering continuing education to distant locations.
5. In 1998 and yearly thereafter, MSL will offer trustee training in library law and other pertinent topics at six locations throughout the state.

Objective 3.2. By January 2000 the number of participants in the certification program will have doubled to 454.

Baseline: Since 1992, MSL has approved 227 applications for voluntary certification.

Activities:

1. MSL will evaluate the program using a focus group methodology and make necessary changes.
2. After the evaluation is complete, MSL will distribute any changes and adopt an ongoing publicity plan for the program, including strategies for recognizing participants.

Objective 3.3. By December 2000, a higher education institution in Montana will offer a certificate program for library technicians.

Activity:

1. MSL will work with MLA to devise a strategy to approach the University System.

Objective 3.4. The use of MSL's collection of professional materials by librarians and trustees will increase by 10% each year.

Baseline: Unknown.

Activity:

1. By the end of 1997, MSL will evaluate the collection and devise strategies for promoting it to the library community.

Public Awareness and Support

GOAL 4: Montana citizens know about and value the range of services provided by libraries.

Objective 4.1. By 2002, 50% or 41 public libraries will be funded at 85% of the national average for library funding.

Baseline: In 1995, 29 or 35% of all Montana's public libraries reached or exceeded 85% of the national average of per capita funding for library service.

Activities:

1. Beginning in 1998, MSL will offer training in building public support for libraries to all libraries annually.
2. In 1997, MSL will convene a task-force that will study Montana's library laws and funding alternatives to suggest possible modifications in Montana's library law to the 1999 and the 2001 legislatures.
3. The State Librarian will promote the value of all libraries at every opportunity, including an annual state-of-Montana-libraries speech.

Objective 4.2. By 2000, all public libraries and federations will adopt strategic plans that identify local needs, ways to meet these needs, and evaluation plans.

Activities:

1. Beginning in 1998, MSL will offer training in planning for public libraries annually.
2. MSL will adopt incentives to encourage libraries to adopt long range plans.

Objective 4.3. By 1999, Montana library boards will use a revised "Montana Public

Library Standards" to advocate increased local support.

Activities:

1. MSL will establish a working group in collaboration with MLA to revise Montana's library standards.
2. At the April 1998 MLA conference, the association will approve Montana's library standards.
3. MSL will publicize the use of the standards at fall workshops throughout the state.

Leadership for Library Development

GOAL 5: MSL, with federations and local library agencies, will provide leadership to assure that Montana citizens receive excellent library services.

Objective 5.1. Annually, MSL will coordinate statewide plans and programs for libraries.

Activities:

1. Articulate the roles of all libraries in the state's information infrastructure, in community development, and in education, by actively advocating representation on all pertinent committees.
2. Resist any attempts to restrict public access to government information.
3. Resist any attempts to restrict intellectual freedom.
4. Collect, analyze, and distribute statistical and baseline data on all libraries.
5. Provide consulting services to staff and boards.

GOAL 6: All Montana citizens have access to library services.

Objective 6.1. MSL will promote planning and budgeting at state institutions in an effort to have budget supported plans for library services in place for 50% of such facilities by the end of 1998 and for 100% of state institutions by the end of 2000.

Baseline: Unknown

Activities:

1. Evaluate current services provided by MSL.
2. Work with appropriate staff in the Department of Corrections and the Department

of Public Health and Human Services to review library standards and the status of each institution's libraries.

3. Work with appropriate staff in State Government to provide consulting assistance to develop a plan and support for a budget sufficient to meet library needs.
4. Advocate for funding for library services to residents of state institutions.

GOAL 7: Montana's students are served by school libraries that meet state standards.

Objective 7.1. By 2000, Montana's school librarians receive consulting help from a state agency.

Activities:

1. Work with MLA to survey resource providers and identify stakeholders' needs.
2. Work with MLA to identify a lead agency and the appropriate budget to provide consulting to school librarians.
3. Advocate appropriate legislation to the 1999 legislature.

INFORMATION SERVICES

GOAL 1: Provide access to the current and accurate information needed by Montana State Government, Montana libraries, and Montana citizens using MSL services.

Objective 1.1. Increase State employees' use of State Library services by 50% by January 1998 and 25% per year thereafter.

Baseline: As of January 1997, 105 State employees are registered users. This number does not accurately reflect all use because some state agency librarians use the State Library's resources on behalf of their agency's employees. MSL estimates 550 transactions monthly with state employees.

Activities:

1. Publicize the online status of the Montana State Library catalog to all Montana libraries and all State employees.
2. Prepare a specialized public relations program for State employees and agency managers so they are aware of the services provided by the Montana State Library. Include a package of MSL material for new employees.
3. Explore alternative ways to provide a current awareness program to State employees.

4. Request a professional to develop a needs assessment survey for state agencies (excluding universities).
5. Provide a quarterly bibliographic instruction program, including the use of the Internet for research, for state employees and other interested persons.
6. Provide information about MSL resources to targeted state employees that highlights their needs and interests.
7. Convince the Governor's budget office and legislator to fund a new position of Reference/Public Relations Coordinator by FY 2002.

Objective 1.2. By December 1999, all State Library materials will reflect the needs of state government and the professional development needs of Montana's libraries.

Baseline: In the summer and fall of 1996, more than 6,000 inappropriate titles were discarded. Many sections of the collections still need careful review to fit within the collection management policy.

Activities:

1. MSL staff will discard all outdated materials that fall outside the scope of the collection development policy by December 1997.
2. The reference collection will be assessed and updated by September 1997. Review the Collection Management Policy for ongoing purchasing recommendations and further collection maintenance.
3. Assess and update the State publications collection by September 1998. Review the Collection Management Policy for ongoing purchasing recommendations and further collection. (See also separate State publications goal)
4. Assess and update the State Library's Federal publications collection by June 1999. Review the Collection Management Policy for ongoing purchasing recommendations and further collection maintenance. This will include physical storage and usable software for all federal CD's.
5. Assess and update the State Library's Periodicals collection by December 1999. Review the Collection Management Policy for ongoing purchasing recommendations and further collection maintenance.
6. Assess and update the State Library's General collection by June 2000. Review the Collection Management Policy for ongoing purchasing recommendations and further collection maintenance.

Objective 1.3. Each year, library users and staff have access to easy-to-use, current

information technology.

Activities:

1. Develop a plan for ongoing upgrading of computer hardware, software, and service providers to assure the speediest access to the Internet and most efficient office computing.
2. Explore, investigate and begin the delivery of end user searching of various online database programs and offer training to MSL staff and the public.
3. By 2000, despite their location users can search an accurate electronic catalog of the State Library.

GOAL 2: The staff of SLR is well-trained and excels in providing service to all users.

Objective 2.1. SLR will offer a coordinated schedule of continuing education for all staff.

Baseline: Currently staff is offered continuing education opportunities as available.

Activities:

1. Beginning in 1998, each staff member will attend annually at least one continuing education opportunity relating to job responsibilities.
2. SLR will annually provide a workshop to all staff that addresses pertinent working issues, such as professional communication, conflict resolution, and leadership training.
3. All staff holding the M.L.S. participate in at least one workshop per year as a presenter and at least two as an assistant or participant.
4. All staff holding the M.L.S. will have the opportunity to participate in at least one regional or national level workshop or conference annually as they pertain directly to job responsibilities.
5. All staff will be encouraged to attend the Montana Library Association Conference and to participate in Association activities.

Objective 2.2. All position descriptions, work plans, and performance appraisals are current.

Baseline: Position descriptions are current; however, most SLR staff have no current work plans or performance appraisals.

Activities:

1. By June 1998, the Director will review all to ensure that they reflect the current mission of the State Library, and reflect the changes in the Federal Library Services and Technology Act.
2. Review all services and the facility to check for compliance with current ADA requirements.

Objective 2.3. All SLR staff will continuously work to improve their performance and help other staff with improvements.

Baseline: Staff have no formal method in which to assist each other.

Activities:

1. At department staff meetings, one SLR staff member will describe ways in which they could improve their service delivery, and describe which tools or support from other staff, might make that improvement achievable.
2. Begin a professional journal program so that reading and sharing of national/regional/statewide issues happens in a formal process. Plan to be started by January 1998.
3. Identify and explore cooperative relationships with other library consultants from other libraries and/or private firms.

GOAL 3: The library facility is comfortable and easy-to-use.

Objective 3.1. To provide the best possible facility for the staff and users of the State Library services. The facility should be an enhancement to great service, not an impediment.

Baseline: The Statewide Library Resources program occupies the lower floor of the Justice State Library building. This building is sixteen years old and Statewide Library resource has had no major renovation or remodeling since 1981.

Activities:

1. Repair or replace library heating, ventilation and air conditioning (VAC) with a functional system giving attention to proper temperature, humidity and dust control by 2000.
2. Redesign and remodel the reference/circulation/public access desk area to allow for better use of the space by July 1997.
3. Provide the L shaped desk for the circulation clerk and replace it with appropriate OAPC furniture by July 1997.

4. Investigate and propose plans for remodeling to improve lighting in the stack areas by January 1998.
5. Provide better signage through the building by January 1999.
6. Provide a bulletin board at front entry way to let people know how to get to the programs of the State Library and other agencies within the building.
7. Investigate more room so supervisors can have doors to their offices.
8. Plan for a staff meeting area.
9. Ensure adequate patron spaces.
10. Review all services and the facility to check for compliance with current ADA requirements.

Objective 3.2. Library users and staff find parking easy at the State Library.

Baseline: Current parking is not enough - often the users cannot park near library, and staff who do not arrive in the early morning often must park blocks from MSL.

Activities:

1. Explore innovative solutions to the availability of appropriate parking for library users and staff.
2. Investigate the feasibility of a two story parking garage.
3. Consider assigned parking spots for all staff.
4. Consider reserved patron spots.
5. Investigate time limited parking on the street.
6. Take a leadership role in encouraging van pools and other alternative transportation.

GOAL 4: Montana citizens have easy and accurate access to state information.

Objective 4.1. To increase the cataloging, distribution, and use of State Publications.

Baseline: Financial constraints are limiting the mass production of paper or microfiche copies of government information. Furthermore, as more government information moves from traditional paper media toward electronic media, citizens' access to information is limited by the technology available to them. The State Library's programs to maintain free, open, and convenient access to public information must be

strengthened to meet the financial and technological challenges of the next five years.
(State Library of Iowa, 1992-1996)

Activities:

1. Designate the State Publications Librarian to be liaison to state agencies and state agency libraries.
2. Develop a state documents collection management policy.
3. Evaluate core collection and survey depository libraries annually for selections and/or deselections.
4. Offer ongoing inspections of depository libraries and assistance in maintaining their state publications collections.
5. List notable state documents on our home page and in the Update.
6. Shift state publications collection to more visible area of the library.
7. Propose new administrative rules for the state document depository program which include the following:
 - a. Remove old language regarding state document depository contracts.
 - b. Expand definition of "state documents."
 - c. Establish the core collection titles.
 - d. Allow for selective depositories.
8. Identify public databases and online services created or funded under the auspices of state government. Work cooperatively with State Library staff and other state agencies to permit free and unrestricted access by Montana libraries.
9. Develop a depository program brochure for libraries, citizens and state agencies.
10. Collaborate with the Academic Cooperative Collection Development Committee to improve the state documents depository program.
11. Develop baselines and evaluations to measure progress.

Objective 4.2. All state agency libraries cooperate to improve services to their clients.

Baseline: State agency librarians meet on a regular basis to discuss items of mutual interest.

Activities:

1. Develop a common interface to state agency libraries' holdings.
2. Develop resource sharing, collection development plan, and purchasing plans with state agencies as necessary or practical.
3. Provide consulting services to state agency librarians.

Montana Talking Book Library (TBL)

MISSION

Provide free library service in an accessible format to all qualified Montana residents who, because of a disability (visual or physical) can not utilize standard print.

Presented below are the projected goals, objectives, and activities for the Talking Book Library (TBL) program for the next five years. Funding of the program during this period will come from state monies and LSTA grant awards. In the following outline, the emboldened goals, objectives, and activities are those which are directly linked to the LSTA and by which the MSL will carry out the purposes of the act.

GOAL 1: Staff, volunteers and patrons will work in a safe, comfortable, and efficient working environment.

Objective 1.1. Finalize plan to reorganize work areas to achieve maximum use of space by September, 1997.

Activities:

1. Design and develop a quiet, efficient, and focused working environment for Reader Advisers.
2. Utilize surplus materials whenever possible.
3. Relocate book inspection center closer to book stacks and mailroom.
4. Partition off printers and file servers from work area to accomplish a quieter work atmosphere. Determine most efficient way to produce mailing cards.

Objective 1.2. Finalize plans to reorganize circulation area, including mailroom, stacks, and machine room by September, 1997.

Activities:

1. In consultation with the Montana State Library (MSL) staff, relocate staff mail boxes to mail room utilizing existing space.
2. Create an area for turn around shelving.
3. Replace at least part of the stacks with movable shelving.
4. Relocate RD's (rigid disks) and FD's (flexible disks) until they can be disposed of.

GOAL 2: Montana residents will receive the best possible service from the Talking Book Library.

Objective 2.1: Increase the percentage of qualified patrons being served from 25% to 35% by the year 2002.

Baseline: Currently, the TBL serves 2,600 patrons or 23% of all potential users.

Activities:

1. Develop and write an outreach plan.
2. Conduct public forums on at least two tribal reservations each year.
3. Arrange to talk to appropriate college classes about Talking Book Library Service.
4. Increase contact with public libraries through public forums, mailings, personal contacts.
5. Monitor and evaluate existing deposit collections and establish new collections in schools and nursing homes.
6. Participate in health fairs, senior expos, and other appropriate community activities.

Objective 2.2. By the end of 1998, the TBL will comply with 80% of the standards in the American Library Association's (ALA) "Revised Standards and Guidelines of Service for the Library of Congress Network of Libraries for the Blind and Physically Handicapped".

Baseline: The TBL presently is in compliance with approximately 60% of these standards.

Activities:

1. Review compliance with the ALA's "Standards and Guidelines" on an annual basis.
2. Respond to and comply with the National Library Service's (NLS) consultant's recommendations based on the ALA's "Standards and Guidelines."

Objective 2.3. Increase the number and the variety of locally produced magazines offered by January 1999.

Baseline: Currently, the TBL offers 3 magazines.

Activities:

1. Survey patrons for areas of interests and specific magazine titles.
2. Verify magazines available from other libraries.
3. Purchase add-on components to duplication machine to increase efficiency.

Objective 2.4. Patrons easily understand current TBL procedures and services.

Baseline: Currently, the TBL handbook is out-of-date.

Activity:

1. A team composed of staff members and a patron will review other states' handbooks, revise Montana's handbook, and make the final version available in alternative formats to all patrons.

Objective 2.5. The efficiency of the selection and mailing of materials will increase by 50% by 1998.

Activities:

1. Purchase appropriate software and hardware.
2. Offer staff complete training.

Objective 2.6. Patrons will have electronic access to TBL information by January 2000.

Baseline: Currently, no patron has such access.

Activities:

1. Add an on-line catalog to the automation system so patrons will have access to library holdings and their records.
2. Make accessible equipment/computers available for patrons.
3. Acquire a Braille printer.

Objective 2.7. Increase the amount of information available through electronic means about the TBL and related services.

Baseline: Information is available on a limited basis to a select audience.

Activities:

1. Assure quick, easy access to the Internet for TBL staff.
2. Make CD-BLND (a CD-ROM disc, updated quarterly, listing titles available in print or brailled format) available on the network.
3. Provide access to Laser-Cat to all staff.
4. Work with NLS to achieve online interaction in the areas of copy allotment, BPHICS (Blind and Physically Handicapped Inventory Control System), and CMLS (Consolidated Mailing List System).
5. Upgrade current telephone service.

Objective 2.8. Improve the quality of the Montana Cassette Recording Program by January 2000.

Activities:

1. Acquire recording equipment to equip a second recording booth set.
2. Investigate the use of digital technology in local recording programs.
3. Replace existing equipment as needed.
4. Purchase add-on components for duplicating machine to increase the volume of tape duplication.

Objective 2.9. By January 1998 all staff will receive training on new automation system.

Activities:

1. Assure training is included in any contract for a new automation system.
2. Complete training before new system is in place.

Objective 2.10. Establish a training/continuing education plan by January 1998.

Activities:

1. Survey staff to determine continuing education needs.
2. Route all continuing education information among staff.
3. Allow a percentage of the budget for CE.
4. Review training needs for any new equipment acquired.

GOAL 3: There will be sufficient funding and staff to offer the best possible patron service.

Objective 3.1. Increase Reader Advisors by two positions to accommodate for increase in new patrons by January 2002.

Activities:

1. Justify to Governor's office and Legislature an increase in FTE.
2. Include circulation and duplication duties in all Reader Advisor positions.

Objective 3.2. Increase private donations to the TBL by 25% yearly by January 2000.

Baseline: TBL received approximately \$7,000 in donated funds in FY '96.

Activities:

1. Provide adequate staffing (through existing staff) to develop, manage and maintain a "Friends" group.
2. Establish a formal fund raising program.
3. Meet National Library Service recommendations to establish and increase ongoing alternative funding methods.

Expand "Friends" group activities to support volunteer recognition activities and summer reading program.

Natural Resource Information System (NRIS)

MISSION

The Montana Natural Resource Information System, located in the Montana State Library provides comprehensive access to information about Montana's natural resources to all Montanans through the acquisition, storage, retrieval, and dissemination of that information in meaningful form.

Presented below are the projected goals, objectives, and activities for the Natural Resource Information System (NRIS) program for the next five years. Funding of the program during this period will come from state monies and contracted services. No LSTA grant award funds are used to support this particular program of the MSL.

GOAL 1: The Natural Resource Information System works to ensure equitable access to natural resource information for all of Montana's citizens, governments, businesses, and industries by using new and emerging information technologies. NRIS will work to improve access to natural resource information by developing state-of-the-art tools to make information easier to use and increase the value of existing natural resource information by facilitating and participating in collaborative information sharing projects.

Objective 1.1. Provide timely and effective service to requests for information on Montana's biological resources, emphasizing rare or endangered plant and animal species and biological communities through the Natural Heritage Program (NHP).

Baseline: In FY 1996, NHP completed 1407 requests for information. In FY 1996, 6,010 records were updated.

Activities:

1. NHP will complete 1500 requests for information per year through direct contacts, self-service and distributed technology.
2. Continue development and maintenance of BCD relational database system* and annually update at least 25% (6,500) of the records in the four primary databases, thereby assuring the most current and accurate data are provided to requesters. (* - ca. 30 databases, 2,000 fields, 25-27,000 records).

Objective 1.2. Provide Montana Water Information System (WIS) and the NRIS Geographic Information Systems (GIS) services. NRIS inventories available GIS data and coordinates GIS data standards and sharing throughout the state.

Baseline: In FY 1996, NRIS filled 1,735 such requests. In FY 1996, 7 databases were made available.

Activities:

1. Provide timely and effective response to requests for information and services related to Montana's natural resources. NRIS will fill 1821 requests for natural resource information and services per year through direct contacts, self-service and distributed technology means.
2. NRIS will improve delivery of natural resource information in FY 1997 at least 30 databases accessible via the Internet and by creating tools to allow users to retrieve the data as well as use the data on-line to create information products.

GOAL 2: NRIS coordinates and promotes the program among all public agencies. Interagency coordination and the development of data standards help insure the accuracy and quality of the data; helps avoid the duplication of data creation and distribution; helps insure that critical data sets are created; and promotes the sharing of resources and information.

Objective 2.1. Serve as liaison and coordinate among agencies that collect, manage or use the same types of natural resource information to prevent duplication of effort and promote information sharing.

Baseline: In FY 1996 NRIS hosted, supported, or participated in dozens of meetings, conferences, and presentations.

Activity:

1. Continue to actively participate in program promotion and interagency coordination.

Objective 2.2. Through the NHP, WIS, and the GIS programs, assist in the development of standards for the collection of natural resource information.

Baseline: No formal program currently exists.

Activity:

1. NRIS will develop statewide spatial data metadata (data documentation) program.

GOAL 3: Provide User Support: Besides insuring natural resource information is available, NRIS helps users make the best use of the information by providing technical assistance, consulting, and developing information analysis and interpretation tools. This assistance and the tools help users effectively use the information. Without the tools to analyze and interpret information, data have less value.

Objective 3.1. Through the NHP, WIS, and the GIS provide technical assistance and consultation to state agencies and other NRIS data patrons.

Activities:

1. NRIS will support state agency libraries by participating in the State Agency Librarians Roundtable and other support as requested.
2. NRIS will consult with state agencies and local government on information systems needs assessments, database design, information management tools design and development, and pilot project development as requested.

Objective 3.2. When appropriate, develop and make available the tools for the access and use of natural resource information.

Baseline: NRIS currently has two query programs on line: an interactive legislative district map and an interactive Heritage Program sensitive species query program.

Activity:

1. NRIS will add at least two interactive information programs on its Internet site in FY 1997. These are likely to be a program to allow patrons to query and make maps of individual watersheds and one to display and query information about US Geological map series.



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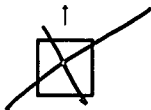
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