

Supporting Patron Access to Rural Libraries in Maine through the Balsam Library Consortium

by Nancy B. Grant

Rural libraries tend to be small, with limited budgets and staff with little or no library experience. But these staff are the reason most such libraries are still open. A successful rural librarian greets you by name, asks about your family, and has ready for you the newest book by your favorite author. Many of Maine's rural public libraries are the heart of their communities. They are often found in the town center in an old school building, in a room in the town hall, or in a donated older house. A few were built many years ago using donated money, materials, and labor. Rural school libraries vary from a small reading room to a fully equipped modern school library.

Budgets for these libraries are controlled by local taxes, trust funds, and grants. In the schools, state and federal funding is linked to school population and town property valuation. Public library budgets often only cover minimal salaries along with maintenance of the library building. School staff salaries are set by local contracts, and school library staff are included in administrative staff, teaching staff, or clerical contracts. Access to new materials, or to van delivery for interlibrary loan, is financially limited.

These small rural libraries need local financial support to survive and thrive. By providing greater access to library resources through 24/7 online access to the catalog, libraries can increase citizens' support for their libraries during local budgeting processes. The

Maine Balsam Library consortium was formed to support small libraries with very limited funding by allowing them to provide online access at a much lower cost than that of other online library catalogs.

BALSAM LIBRARIES

In the early 1980s, several Piscataquis County librarians recognized the need for staff education in the use of library technology and formed the regional TriCounty Librarians group (with librarians from Penobscot, Piscataquis, and Somerset Counties). This group received a grant to explore technology, acquire computers, and provide substitutes for regular meetings of the group. The group of about 20 school and public librarians was involved with the early adoption of the CD-ROM version of the Maine Catalog. The usefulness of the Maine Catalog and the interlibrary loan system for both librarians and patrons encouraged the TriCounty group to continue upgrading technology. By the early 1990s, Winnebago was the system used for online catalogs for about half of the TriCounty libraries.

By 2010, the cost for increasing the number of libraries and for the needed upgrades became an obvious barrier to the expansion and maintenance of the Winnebago system. Four of the librarians requested a grant from the Stephen & Tabitha King Foundation to explore moving to an open-source catalog. The

grant provided nine of the original TriCounty libraries with funding to acquire Evergreen open-source catalog, to upgrade their current technology, and to provide training for librarian and patron use. This group chose Balsam as their name, developed the consortium's structure, found a volunteer manager to oversee future growth, and located a part-time programmer with open-source experience.

As of 2023, Balsam is the catalog in 43 library buildings: 22 public libraries, 19 school libraries in 8 districts, 2 academic libraries, 1 healthcare library, and 1 private library. It has expanded from the TriCounty area to include libraries in Jay (Franklin County), Ogunquit (York County), Bass Harbor (Hancock County), Island Falls (Aroostook County), and Jonesboro (Washington County), Maine.

While librarians often find out about Balsam by an informal word-of-mouth process, Maine State Library staff also mention Balsam to libraries with limited financial assets. Balsam is also a vendor at the yearly Maine Library Conference, and Maine InfoNet is supporting Balsam in its efforts to include Balsam libraries in the Maine Catalog. Balsam's website is accessible to both potential members and also current members.

WHAT DOES BALSAM PROVIDE?

In addition to providing access to Evergreen, an open-source integration library system for managing, cataloging, and circulating library materials, Balsam allows libraries to offer an online public access interface to help patrons find those materials. The one-time cost of joining Balsam is \$500, and the yearly service fee is based on

PROCESS OF JOINING BALSAM

1. A library contacts Balsam requesting more information.
2. Balsam's president and manager arrange an in-person visit.
3. The manager explores technology resources of the library.
4. The president discusses the library's current status and staff experience.
5. Balsam rules and the process for joining are presented.
6. Balsam presents possible ways to add that library's resources to the Balsam catalog.
7. The library staff is invited to attend a Balsam meeting.
8. Balsam offers support in writing a grant to fund the process.
9. The new library applies to join and signs the MOU.
10. The Balsam consortium votes on accepting the new member.
11. Balsam's programmer adds the new library to the catalog.
12. Library staff are added to the Balsam website and communication lists.
13. The library staff trained in using the Evergreen software.
14. Zoom sessions are scheduled for training follow-up.
15. A Balsam mentor helps the new library as needed.

the number of volumes the library has in the catalog. This fee runs from \$400 for under 10,000 items to \$1,800 for over 150,000 items and has not changed for the past 10 years.

Training provided by Balsam is included in the yearly service fee. Initial training covers setting up staff and patron access, circulation, using the online public access catalog (OPAC), adding items to Balsam, and creating reports with Balsam templates. When the library is ready, Balsam also provides training for patron access accounts, using the online catalog, cataloging items in Balsam, developing library unique reports, and using Evergreen documentation. The cataloging of library holdings is covered in stages. Balsam is currently setting up certifications and auditing processes for improving the catalog. Only a few trained and certified Balsam MARC (machine-readable cataloging) experts

are allowed to add original MARC records.

Beyond needing help with the process of adding the library catalog to the Balsam catalog, some libraries need general library help. Many rural libraries have only one staff member and often it is someone with little or no library education or experience. Balsam supports members as they learn more about the profession and more about how to effectively manage a library. Several Balsam members have library degrees and extensive experience to share with the new libraries needing help. Public librarians are directed to the Maine Library Association, to the Maine State Library standards, and helped to improve their ability to meet these standards. School librarians are directed to the Maine Association of School Libraries (MASL), the Maine Effective School Library Program standards, and provided with help to improve student use of the library.

The consortium has also helped libraries with writing grants to cover costs, including updated computers, the one-time cost of joining Balsam, or buying barcodes for their items. Additionally, some libraries need help weeding their collections before adding their materials to the catalog. Often rural libraries keep everything they acquire from local donors. Balsam helps librarians recognize materials that should be discarded. Some libraries need help organizing and labelling the collection for better patron access. Others need help learning how to access and improve their collection using the software reports. Balsam help often leads the librarians to develop library policies. Every library has individual needs and the librarians quickly learn which other Balsam members can help them to meet those needs.

Each new Balsam member is assigned a mentor who, when possible, is from the same type of library or a nearby library. Mentors visit the new library at least once in the early months to meet the new staff and see how the library is organized. Balsam suggests that mentors call, text, or arrange a Zoom meeting two to three times in the first year to see how Balsam is working for the new member.

Individual Balsam libraries have great leeway in how much of the extensive Evergreen system they use. Anyone in the group can dig deeper into the Evergreen system and share their new learning. The Kids OPAC is still being explored, as is producing more reports specific for individual libraries needs.

Librarians often hear positive comments as the patrons discover and learn to use the new and improved catalog. Patrons with internet access may search all Balsam libraries or just their local library, and patrons have commented positively on this increased access to a wider variety of materials. This access

was especially important during the COVID-19 pandemic, with patrons finding and requesting items for curbside delivery. The software's patron accounts also provide increased support for local libraries. Libraries can choose to provide their patrons with password-protected individual accounts, which allow patrons to keep track of what they check out, develop lists for future reading, and place holds on their local library items. If the library is part of the Balsam interlibrary loan group using the Maine State Library van delivery program, patrons may also place holds on items in that group's libraries.

Library board members or trustees are often heavy users of their library and they voice appreciation for replacing library clerical work time with time for providing more programs for the local community.

KEY LEARNINGS FROM THE
BALSAM EXPERIENCE

1. An online local library catalog is a useful resource for connecting with local patrons.
2. Libraries with online catalogs gain more library support.
3. Libraries with patron access accounts gain more patron support.
4. Financial support is needed for improving local patron access to local library resources.
5. Listening to the library staff is critical.
6. Addressing needs mentioned by staff is more important than tackling all library standards.
7. Mentoring with a familiar face or voice works.
8. Follow-up contact on a regular schedule works.
9. Group meetings with time to ask questions works.

10. Training, certification, and auditing is a best practice approach to cataloging.
11. Staying connected with Maine InfoNet and sharing the needs of the small rural libraries is important.

It only took four interested librarians to start the process that led to major changes in the Balsam libraries. The support of the Maine State Library and the professional library organizations helped acquire the funding and provided some of the library-centered education. The members' increased technology knowledge led to more frequent communication among isolated rural areas. Face-to-face meetings with a mentor or time in the group meetings provide a level of comfort for asking seemingly "stupid" library questions. Every librarian has grown in understanding how to use the online catalog as a means to gain local support for their library. Developing a library consortium focused on an online catalog is a work in progress. More importantly, the consortium linked isolated rural librarians with ongoing support beyond just acquiring new technology.

Nancy B. Grant has been a library media specialist in Maine schools for 36 years and president of Maine Balsam Libraries Consortium for 10 years. She has an extensive record of service to Maine's library community, serving on the board of Maine Infonet since 2015, as a library trustee for the Thompson Free Library in Dover-Foxcroft for 20 years, and as a member of the Maine School Librarians Association since 1988. Grant was Maine's Library Media Specialist of the Year in 2007.