

# 2023 LIBRARY DIRECTOR MANUAL



MONTANA  
**STATE LIBRARY**  
A GREATER STATE OF KNOWLEDGE

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## **Introduction**

Welcome to the Montana library community. If you are reading this, we're guessing you are a new director, or perhaps you've been working in the Montana community for a while and need a quick refresher on something.

We made this manual short and concise. It's designed to give you a quick introduction to various organizations in Montana, to library law, and to issues you might face when working with policies or personnel.

## **Getting Started – New Library Directors**

### **Suggestions for the first few days on the job:**

- Get to know your staff and reassure them. Do you remember what it was like to have a new boss? Your staff feels much the same way as you might have. Try to remain neutral and avoid any negative comments about the way things were done in the past.
- Tour the building with staff and schedule time to work with them. It will give you a good feel for how things are done.
- During this period, you should be spending time acquainting yourself with the staff, the community, and your library.
- Listen! Ask questions and really listen to the answers. Until you develop a feel for the library and hopefully a good working relationship with your staff and board, you don't want to make any major changes.

### **Suggestions for the first month:**

- Get to know your board members. Ask them questions like: what do they think of the library? where do they want the library to go?
- Read through the former director's files and correspondence. It will give you an idea of what has been going on in the past.
- Review the long-range plan, financial operations and policies.
- Read through board meeting minutes to get a historical perspective and to have an idea of how much information board members expect.
- Contact local government personnel.
- Create a calendar with important dates, such as contract dates, insurance expiration dates, dates of local significance and deadlines.
- Meet with State Library staff and area librarians to learn more about your region and the Montana library community
- Register for OKTA login and set up your ASPeN account. You'll find helpful information on this and other MSL services in Knowledge Base articles <https://montanastatelibrary.zohodesk.com/portal/en/kb>

## Montana Library Scene

We're going to briefly describe some of the entities you will work with in the Montana library world. These are organizations dedicated to providing excellent library service in Montana.

### Montana Library Association

The Montana Library Association (MLA) offers camaraderie, guidance, and support. MLA is a statewide professional organization dedicated to supporting libraries, trustees and library staff in Montana. The group lobbies for legislative changes, provides continuing education, promotes library interests and development, and offers its members a chance to network with other library staff.

Throughout the year MLA hosts retreats and an annual conference where members can meet and learn more about what is happening in libraries.

MLA is a membership organization which represents all types of libraries, public library trustees, and members of Friends organizations within its divisions and interest groups. MLA standing committees work on a variety of library-related issues including government affairs, intellectual freedom, marketing, and professional development.

*Focus* is the bi-monthly newsletter of MLA. It covers library information, upcoming events, and relevant library news. Learn more about MLA at <http://www.mtlib.org>

### Wired-MT

Wired-MT is a listserv for Montana library staff provided by the Montana Library Association. A listserv is an electronic forum where people can post ideas or find out what is happening in the area. This listserv is a great resource for library staff and board members, so we recommend subscribing to it. Instructions on how to subscribe to wired- mt can be found at <http://www.mtlib.org>. Library staff can read messages posted on a variety of topics and they can post messages and/or questions for others to read.

### Federations

Montana is one of the few states that organizes its libraries into federations. Essentially these are regional support systems for libraries. Every year the State Library receives money from the legislature that is distributed to federations. There are six federations in Montana. When you are looking for support or help in your area, try the members of your federation. Many of these librarians have had similar experiences and might be able to help you connect with regional resources.

Federations support library staff by providing continuing education opportunities, awarding monies, consulting and reference services, offering reciprocal borrowing privileges, and networking opportunities.

Federations are comprised of libraries of all types, but public libraries are central to their existence. Meetings to network, receive training, and decide on the appropriate way to use the money granted by the state are held each year. Typically federations meet at least once a year. Trustees and library directors are encouraged to attend. Each federation elects a coordinator who is responsible for answering questions and providing guidance for planning.

Federation members are responsible for developing a plan of service that describes how federation funds will be used for the year. Common activities include continuing education and money for cataloging and reference tools. Libraries must work together in order to thrive; federations are one way of achieving this cooperation.

You can find contact information for your federation coordinator, links to the plans of service and meeting information here ([http://libraries.msl.mt.gov/library\\_development/consulting/federations](http://libraries.msl.mt.gov/library_development/consulting/federations))

## Continuing Education

There are many opportunities for continuing education, both in Montana and out-of-state. This section is intended to give you an idea of what opportunities are available in Montana, approximately when they happen and contact information.

- MLA Annual Conference occurs in April. The conference lasts three days and has several pre-conferences. Workshops cover a wide range of topics and tend to be shorter. Check out <http://www.mtlib.org> for more information.
- MLA hosts a couple of retreats every year. One is the PLD/ASLD Fall Retreat. PLD ASLD is the Academic and Special Library Division. Just in case you are wondering, there is also a School Library Media Division. The Fall retreat offers workshops focusing on pertinent library topics. You can find out more about this retreat on the MLA website at: <http://www.mtlib.org>.
- MSL offers workshops on a variety of topics. These can cover everything from grants to children's services to trustees. For more information on this and other learning opportunities: <https://msl.mt.gov/libraries/learning/Continuing-Education>
- Federation meetings are held in the spring and fall. Contact your Federation coordinator for more information.
- Online classes are available in a variety of ways. The Montana State Library offers online classes developed by state library staff, online training with our training specialist, as well as Webjunction courses. To learn more about our online trainings please see our continuing education page: <https://msl.mt.gov/libraries/learning/Continuing-Education>.
- Montana Library Event Calendar. This online resource is a statewide training/event calendar created to provide a focused source of information for library-related activities that can be used as a planning tool for librarians and trustees. The calendar is managed by Montana State Library with cooperating libraries. The website address is <https://mslservices.mt.gov/ASPeN/Events/>
- Our Continuing Education Coordinator and Statewide Consulting Librarians will provide on-site workshops on a variety of topics. We request that at least 4 people attend each training. Please contact our training specialist at 406.444.3365 for more information.



## Certification

Since we just talked about continuing education opportunities, we'll take a quick look at certification in Montana. The State Library certifies public library directors, who must be certified in order for the library to meet the current standards and receive state aid. Public library directors must obtain 60 hours every 4 years. As a new director seeking initial certification, you need to obtain the following credits:

### Total Credits

60 continuing education credits earned in a 4-year period

### Library Administration Category

30 credits

30 additional elective credits in any category

- Library Administration
- Library Services to the Public
- Collection Management and Technical Services
- Technology

### Renewal after Initial Certification

### Total Credits

60 elective continuing education credits earned in a 4-year period

Once you have the 60 credits you can submit for certification within ASPeN. For more information about the program please see <https://msl.mt.gov/libraries/learning/Certification>

## **Montana State Library**

The Montana State Library (**MSL**) is the source for State Government Information, Natural Resources Information, and Geographic Information. The State Library supports the development and excellence of Montana's tax-supported public libraries. Staff also support reading for Montanans with visual or physical disabilities through the Talking Book Library. There are a number of newsletters you can sign up for to stay up to date on activities of various areas within MSL.

<https://public.govdelivery.com/accounts/MTLIBRARY/subscriber/new>

## **Library Commission**

The Commission provides assistance and advice for all public libraries in the state, administers federal and state grant funds made available to Montana for library purposes, provides library services for the blind and physically handicapped, sets standards for public libraries, and certifies librarians.

## **State Librarian**

The Montana State Librarian provides leadership and articulates a vision for statewide library services, recognizes divergent library objectives, and develops statewide consensus among Montana's libraries. The State Librarian directs the Montana State Library, serves as executive officer of the State Library Commission, conducts strategic long-range planning and evaluation of library services. The State Librarian also advises the Governor and the Montana Legislature on the present status of library and information services and on new programs or legislation necessary for effective library service to the people of Montana.

## **Public Library Standards**

Public libraries must meet the essential standards found on the website below to receive state funds. You will be asked to certify compliance on an annual basis. State Library staff are happy to answer questions about these standards.

The essential standards according to Administrative Rules of Montana 10.102.1150 through 10.102.1154 can be found at

<https://docs.msl.mt.gov/librariesweb/documents/Standards/FINALEssentialStandardsARM.pdf>

## **Montana Shared Catalog**

The Montana Shared Catalog (MSC) is the name of a statewide catalog project originally funded by the State Library. More than 180 public, school, academic, and special libraries from all regions of Montana are members of the MSC. By working together these libraries seek to offer patrons the best library service possible.

How to Join: [http://libraries.msl.mt.gov/statewide\\_projects/montana\\_shared\\_catalog/join](http://libraries.msl.mt.gov/statewide_projects/montana_shared_catalog/join)

## **Supporting the development and excellence of Montana’s public libraries**

<https://msl.mt.gov/libraries/>

Montana State Library staff provide consulting and training services to libraries in Montana. Staff are available to answer questions about library services, policies, working with library boards, and to brainstorm programming ideas. Consulting staff can facilitate a strategic planning process for the library and assist with meeting the public library standards set by the Commission. State Library staff also provide training and continuing education opportunities for library staff and trustees across the state using input received from librarians and board members. State Library staff scan the national library environment to determine other topics that might be of interest to Montana libraries. Finally, staff oversee the certification program adopted by the Commission.

Staff members also encourage and assist libraries with collaborative efforts that improve and provide library services statewide, including several efforts where libraries have joined forces to offer expanded library services. These cooperative efforts make it possible to offer an equivalent level of service for all sizes of public libraries. Staff monitor the national scene, listen to what librarians are requesting, and manage the technical aspects of planning, implementing, and maintaining cooperative services.

The last major service provided is assistance with programming in libraries. Staff research and arrange professional development opportunities on a variety of topics. The most significant investment of staff time goes towards supporting early literacy efforts in libraries. However, staff focus on all ages and provide programming ideas and training for teens, adults, and seniors.

## **Providing Information about State Government, Natural Resources, and Geographic Information**

Montana State Library staff provide policymakers and citizens with information about Montana's resources and government. With the advent of new technologies, much of this information is electronic in nature.

MSL staff act as the principal resource for serving the work-related information needs of state employees and provide backup reference services for Montana libraries as well as public access to state publications for Montana citizens.

Staff acquire and provide access to information on Montana's natural resources for government agencies, business and industry, and private citizens. Staff operate a clearinghouse and referral service to link users with the best sources of information and service. These services include the Natural Heritage Program (NHP).

NHP scientists collect, manage and disseminate biodiversity information: plants, animals and natural communities, emphasizing those that are rare, declining or have outstanding quality.

Montana citizens and GIS practitioners in Montana have a decades-long investment in a strong foundation of GIS knowledge, partnerships, spatial data infrastructure, and data sharing tools. This investment in GIS empowers local, state, and federal government staff as well as business, industry, education, and research personnel seeking to understand Montana's economy, demography, landscape, and much more.

Montana State Library staff support State GIS Coordination in Montana to ensure that this investment not only endures but is further expanded, strengthened, and utilized.

## **Talking Book Library**

[https://msl.mt.gov/libraries/talking\\_book\\_library/](https://msl.mt.gov/libraries/talking_book_library/)

Montana's Talking Book Library (TBL) provides free library services to Montana citizens who are blind, visually impaired, physically disabled, or learning disabled. This program is affiliated with the Library of Congress' National Library Services for the Blind and Physically Handicapped. Services provided to Montana patrons include recorded books and magazines, playback equipment, descriptive videos and Braille books. TBL staff advise and assist individuals, other libraries, nursing homes, schools, and institutions in providing library services to eligible disabled individuals.

## **Montana History Portal**

<https://www.mtmemory.org/>

The Montana History Portal (Portal) is an online source for digital collections relating to Montana's cultural heritage. In part, these collections document the Montana experience. Access is free and open through the Internet. Many of these items are digitized copies of historic material, some items are contemporary. All serve as a resource for education, business, pleasure, and lifelong learning.

Many Montana libraries, museums, archives, and cultural institutions add materials to this collection. Contents may include maps, copies of photographs, rare books, historic documents, diaries, oral histories, audio and video clips, paintings, illustrations and art.

## **ASPeN**

ASPeN stands for Access to Services, Programs, and eNetworks. <https://mslservices.mt.gov/aspn/>

It is a database providing a variety of services for Montana's library community. Library Directors will be able to update their library's information, keep track of their continuing education, and complete paperwork required by the Montana State Library. In order to use ASPeN for these purposes, you'll need to register for a login with OKTA, Montana's state login service. MSL staff are available to assist you with ASPeN questions and issues via a ticket system linked from the main page.

# The Library Director, Board, and Local Government Officials

The director, board, and local government officials must work together. It's important for you to get to know your county and city officials. Ask them about the needs of your community. Find out what is important to them. It will make it easier for you to communicate with them about the importance of the library and why it matters.

In the chart below, we explore the different roles of a director and board.

	<b>Board</b>	<b>Director</b>
<b>Policy Making</b>	Determine the goals and objectives of the library, as well as methods of evaluating progress towards them	Provide assistance and direction to the board in setting goals and objectives and determining methods of evaluation
	Consider what policies are needed	Recommend needed policies and advise board
	Officially adopt policies	Carry out policies and interpret them to staff and public
<b>Administration of the Library</b>	Employ director, adopt plans, policies and budget, which gives board indirect responsibility.	Has direct responsibility by administering the library within the framework of the board's plans, etc.
	Keep in touch with library's progress via personal visits to the library, librarian's reports, and feedback from the public.	Report status, problems, etc. to the board either via board meetings or other methods.
<b>Personnel</b>	Employ library director and confirm staff appointments	Employ and supervise staff.
	Develop personnel policies and make sure working conditions are acceptable.	Recommend needed improvements and/or new policies.
	Evaluate library director.	Suggest evaluation criteria and provide materials for board.
		Maintain records of personnel evaluations.
<b>Budget</b>	Scrutinize preliminary budget, make necessary changes, adopt official budget.	Prepare preliminary budget. Research and provide board with information relevant to the discussion.
	Explore and consider ways of increasing library funding.	Decide on use of money within budget, long range plan, etc.
	Authorize expenditures.	

	<b>Board</b>	<b>Director</b>
<b>Board Meetings</b>	Attend and participate in all regular and special meetings.	Attend all regular and special meetings.
	Maintain "open meetings" as required by law.	Give appropriate public notice.
	Approve minutes.	Act as secretary to the board, prepare agenda and provide minutes.
<b>Public Relations</b>	Establish and participate in planned public relations program.	Maintain an active program of public relations.
	Serve as link between the library and the community	Interpret board policies to staff and public.
	Keep political fences mended.	Involve library in community activities.
		Keep political fences mended.
<b>Continuing Education</b>	Read trustee materials and library related publications.	Call significant materials to board's attention.
	See that new trustees have orientation	Organize new trustee orientation.
	Attend Federation or trustee-related meetings.	Inform trustees of important meeting dates.
	Support continuing education for library staff and board members.	Inform trustees of important continuing education opportunities and urge trustees to include travel money, etc. in budget.
<b>Planning for the Library's Growth</b>	Analyze the community and consider library's strengths and weaknesses.	Suggest and provide materials for community analysis. Help analyze library's strengths and weaknesses.
	Set goals and adopt short and long range plans for the library.	Recommend plans and means for implementing.
	Set priorities and decide on course of action.	Administer library in terms of plans adopted by board.

## **Tips for Working Together Successfully**

- Spend the first year building trust between the director, the board, and local government officials.
- Pick your issues carefully. Bring up major things, but don't bother each other with things that are only mildly irritating.
- The keys to working with each other are respect, communication, and tact.
- If someone has an idea that is not feasible for the library, point out some of the practical difficulties. Keep your cool and treat the request with respect and tact.
- If the board makes a decision you do not agree with, it is still your duty to carry it out. The only exception to this is where the decision forces you to do something illegal or unethical. For all other cases, adhere to the board's decision and don't express a negative opinion about it to the staff or public.

## **Getting Board Members to Attend Meetings**

Are you having problems with board members not attending the meeting? If the answer is yes, ask yourself these questions. Working on these issues may help you get better attendance.

- Are meetings businesslike and productive?
- Are the agenda items board level or trivial?
- Is everyone encouraged to participate?
- Does another board member contact the missing members and encourage them to attend next time?
- Are your meetings positive?
- Do you follow a schedule for board meetings? For example, meet 2nd Tuesday of every month.
- Do you serve food? It does work!
- Are your meetings exciting and interesting? Do board members have an opportunity to brainstorm or plan for the future?

## Library Laws

Here is a brief summary of the various pieces of law that are the backbone of the legal system in Montana. Hopefully you won't need an in depth understanding of various legal issues in order to work with your board and local government officials. A basic understanding of the legal system in Montana as well as knowledge of some critical laws will be helpful when working with others. The Montana Constitution, Montana Laws, and Administrative Rules of Montana as they pertain to public libraries.

- [Constitution](#) - a document that guides many of the decisions of lawmakers and others who work with the law
- [Laws](#) - the Montana Code Annotated is the collection of laws that you must follow. These are more general than the administrative rules. Think of this as what you must do to comply with the law. The Montana Code Annotated is created by the state legislature.
- [Administrative Rules](#) - these rules identify how to comply with the law. Think of them as spelling out the details within the Montana Code Annotated. State agencies create administrative rules.

Please review the following laws, as they are important to know and understand. You can find more information about these laws at

[https://msl.mt.gov/libraries/library\\_development/consulting/library\\_law/laws\\_and\\_rules](https://msl.mt.gov/libraries/library_development/consulting/library_law/laws_and_rules)

- [Open Meeting Law](#) - Montana has a strong open meeting law where the public is given the right to attend meetings and learn about what their government agencies and departments are doing to provide better service for Montanans.
- [Powers & Duties of the Library Board of Trustees](#) - this law covers the powers and duties of the library board. If you are a district library please see [MCA 22-1-707](#) for information about what your board is legally able and expected to do.
- [Library Records Confidentiality Act](#) - Montana protects its citizens by making library records private. What people read, what websites they visit, and even what library programs they attend are protected by this law.

These three laws are very important, but there are other laws that may impact you. Please visit the website above to learn more about library law. We will talk about the financial laws in other chapters of this handbook. If you have a question about library law, please contact your state library consultant.



# Planning

## The Long-Range Planning Process

Long range planning should involve everyone in the community: trustees, staff, customers and non- users. A library is a community center. Involving everyone in the process is time consuming, but you get a much better picture of your library and where it should go. In addition, involving others helps even out the work load. Effective planning is hard work, so share the load with others.

### Preparing to Plan

How much time are you prepared to devote to the planning process? That will help determine whether you are going to do a board plan with community input vs. a community focused plan. The latter usually takes a bit longer and requires a planning committee to ensure that stakeholders are represented and heard. You will also need to decide up front how you are going to keep people informed of the planning process and results.

The work of the long range planning committee is to identify what the community needs and how the library can help meet those needs. The committee's role is not to set the library's goals and objectives. That is the Board's job. Involving the community in the planning process, however, will ensure that those goals and objectives are firmly rooted in the community's best interests.

Here are some of the questions you'll want to look at in your planning process:

- Where do we want to go as a community?
- Where are we now?
- SWOT – some planning processes include a SWOT analysis looking at the Strengths, Weaknesses, Opportunities and Threats they see in their community.
- What are the community's needs and how can the library help meet those needs?

### The library's written long-range plan

After the community committee's road map is complete, the Library Director and Board can prepare the library's long-range plan setting goals and objectives for serving the community. The following elements should be included in the written plan:

- A short summary of the plan highlighting what the library wants to accomplish in the next three to five years.
- The mission of the library.
- Goals and objectives.
- Implementation activities and the staff members responsible.
- Measuring success

It is important that the Board monitors the implementation of the plan and its on-going effectiveness. Given today's ever-changing communities, the goals and objectives in the plan might need to be adapted.

Trustees should set a schedule for reviewing the plan that includes periodic progress reports from the library director and any committees that are implementing parts of the plan, as well as an annual review and final evaluation. ([See the Library Evaluation chapter](#) for more on the evaluation process.)

## **Additional Planning**

After the long-range plan is in place, it becomes the basis for how the library operates. As the Board considers other elements of library services, it can use the long-range plan as the starting point for planning for facilities, technology and public relations.

### **Planning for Facilities**

The typical public library serves the community with a variety of programs and a diverse collection of materials. The Board needs to determine if the facility meets the current needs of the library as well as its future needs based on the long-term plan. Will there be a need in the near future for more meeting rooms, for example? Do services focus on a particular user population, such as children or seniors? Will that change over time? Each group has its own needs and the facility should reflect that.

After the long-range plan is developed, the Board might decide that the library facility needs to be renovated or upgraded. If so, it is vital that the public be informed. Clearly communicate how the library's plan to meet future needs of the community is changing the face of the library. More information about planning for facilities is available from the State Library.

### **Planning for Technology**

In addition to short-term issues, such as periodic upgrades of computer equipment, the Board must also consider long-term technology issues in light of the long-range plan. For example, if computer classes were identified as a community need, the Board may want to plan for the purchase of computers as well as find space for a computer lab within the facility. Or if digitization of local history was identified as a community need, the library might require a different set of technology and equipment than it currently owns. The long-range plan will be the guide for developing a technology plan that reflects the community's priorities.

### **Goals or Objectives?**

Goals are general accomplishments that support the library mission. In general, goals are not time limited and are often not expected to be fully accomplished. A sample goal is: The library provides materials which are appropriate to the lifelong learning of its adult users.

Objectives are specific, measurable, time-limited descriptions of desired results. Achievement of objectives will be the basis for assessment of success in meeting library goals. One of many possible objectives that would relate to the above goal is: During the next fiscal year, increase turnover rate of selected sections of the adult nonfiction collection to 5 circulations per item.

### **Planning for Public Relations**

On-going communication with the public is key to implementing the library's long-range plan. Written plans for each public relations campaign will help the library achieve its goals. The plans should include a clear description of the target audience, that is, who the library wants to reach; a timeline; short- and long-term goals of the campaign; staffing requirements; the budget; and details of how success will be measured. (See the Marketing and Public Relations chapter for more on public relations.)

## **Planning for Disaster**

Disaster response and prevention is essential for the continuation of library business. A written disaster plan will help ensure the health and safety of the staff, decrease the amount of time it takes to begin recovery, and increase the recovery rate for materials.

When preparing a disaster plan:

Consider types of disasters most likely to happen, including the possibility that the entire building or collection might be destroyed.

Consider what services would be most affected if patrons and staff did not have access to the building and its collections.

Determine who has the decision-making authority in the case of a disaster:

- to close the library
- contact the insurance company
- assign staff to the recovery effort
- hire temporary staff if needed
- serve as media spokesperson.

It is the director's responsibility to ensure that the staff is knowledgeable about emergency procedures, but trustees should be familiar with them as well. One of the Board members might be responsible for having a copy of the disaster plan stored at home in case the library copy is damaged or is inaccessible.

## **Deciding on Success - Reviewing how a library is doing**

In order for a library to be successful, we need to be able to answer two questions:

1. What progress are we making, or what difference has the library made for the people it serves?
2. What changes occurred?

### **Identifying Desired Outcomes**

Part of the Board's responsibility in completing the long-range plan is defining its goals or desired outcomes. Outcomes result from a discussion of the critical question, "What changes or accomplishments are expected?" These can occur in the library users, the library, local agencies and organizations, and ultimately, the community.

For library users, changes might be expected in their knowledge, behaviors or attitudes. Examples of these changes include learning more about a specific subject, being a more informed consumer, reading more for relaxation or becoming more open to divergent viewpoints. Program attendance figures, the number of information requests and collection use statistics also can be used to indicate outcomes. Community collaboration is another area where desired outcomes can be defined.

### **Setting Targets**

Once the Board has defined its desired outcomes, it can set measurable or observable objectives, or targets, including timeframes for completion. For example, targets may be to increase circulation by 10 percent within a year, reduce complaints by 50 percent by the end of the fiscal year, or hold three adult programs. These targets provide useful benchmarks for both the extent and quality of library services. Without clear targets, we can only describe what was done, not what was accomplished.

"Impact stories" can be done to supplement measurement of outcomes. These are stories that illustrate how things have changed for the users, library, collaborators or community. The process of describing impact uses quotations and observations to tell the library's story, providing a better understanding of how others are influenced by the library. They also bring multiple "voices" to the process.

### **Evaluation Process**

Once the first two steps are completed, the process is primarily a mechanical one. The Board will need to determine who will be responsible for the evaluation and the timeline. Among those involved may be library staff, volunteers, users, community partners and funders.

The Board will also need to determine how information is collected. Possible methods include collecting statistics, interviews, questionnaires and structured observation. The key to choosing strategies is to consider which are the most appropriate for the information needed to document change, while keeping in mind the time and cost of each approach.

Evaluation helps promote both the effectiveness and efficiency of the library's operations and services. The goal of the process is to use the information to improve the library, making it a learning process for all involved.

### **Library Standards**

The Public Library Standards can be used to set goals and plan for the future. These are defined in the Administrative Rules of Montana; libraries are required to meet the Essential level to receive state funding. While the Essential level provides basic benchmarks, the Public Library Standards Roadmap offers ideas and possibilities for continually improving library services and is a good resource for boards seeking to lead their library forward.

## **Personnel Matters**

In this chapter we will discuss personnel issues that the director needs to consider..

### **Personnel - Director**

Library staff is the most important resource you have. Your library staff will determine whether or not a customer enjoys coming to the library. Even if your collection is not new and your building needs some work, a smiling, friendly staff member can make a customer's experience pleasant. Likewise staff that ignore customers will make any experience the public has uncomfortable.

Managing personnel is probably the most challenging part of any managerial job. You're working with people who have their own needs and agendas. Different people require different management styles, which further complicates the job. The other issue to be aware of is the legal trouble a library can get into over its personnel policy (or lack thereof). You will have your own management style, but a good personnel policy can guide you and assist you in treating people equitably.

This chapter covers the personnel policy, hiring, interviewing, evaluations, promotions, discipline, grievances, and finally some employment laws. Although we can give you a basic introduction to each, you should talk with other library directors or read articles, books, etc. about this topic.

Personnel management is complex, but the thing to remember is that communication and treating people fairly and with respect are the best tools you have.

### **Personnel Policy**

The library generally operates under the personnel policy of the governing authority. You may be required to use city or county application forms, etc. If your library doesn't follow city or county policies or if you do not have a personnel policy, it's best to use the policy of the local government office. If that is not an option because the library is an independent district, creating a policy should be one of your goals. A well-thought out policy is the heart of a good management system. Here are some of the things that should be included in a personnel policy:

- The mission statement for the library
- General expectations of all employees
- Job descriptions for all positions
- General descriptions of compensation
- Description of benefits, including paid leave
- Description of staff development and continuing education opportunities
- Hiring procedures
- Job evaluation procedures
- Procedures for promotion
- Disciplinary procedures
- Grievance procedures
- Procedures to terminate employment

Because your personnel policy is a legal document that may be treated as part of an implied contract between the library and its employees, it should be reviewed by your library's attorney before it is finalized and approved.

We'll now look at each of these parts separately. Remember even if you're a small library, personnel procedures must be equitable for all employees. The legal implications of bad personnel policies are the same for any size library.

**The mission statement for the library:** Employees are expected to support the mission statement of the library. This also reinforces the purpose of your library.

**General expectations of all employees:** A general expectation includes things like treating customers and co-workers with respect. It is a listing of what every employee should be doing.

**Job descriptions for all positions:** Job descriptions are specific for each employee. Job descriptions are the most important part of a personnel policy because they are the basis for hiring, evaluation, and discipline. They should include:

- A detailed description of the results of the work to be done by the position.
- A description of the minimum educational and experiential requirements of the person holding the position.
- A description of other desired education and experiential traits of the person holding the position.

**General description of compensation:** A simple description of salary ranges and other compensation.

**Description of benefits, including paid leave:** Answers questions like what types of benefits does your library offer? Does it offer retirement? Insurance?

**Description of staff development and continuing education opportunities:** Libraries are changing rapidly like so many things in this world. Staff needs continuous training and opportunities for development. The opportunity to grow and learn is important to many people and can motivate them to do better. List what types of development and continuing education opportunities exist for staff.

**Hiring procedures:** We'll look at this one in a lot more detail later on, but it should include the hiring process of the library. This includes things like whether or not you conduct more than one interview, how you recruit people and how you select people.

**Job evaluation procedures:** Again, we'll go over this one in more detail, but this part of the policy should answer questions like how often do you evaluate someone and what methods do you use.

**Procedures for promotion:** It's fine if you promote from within but remember to state this in your policies. A word of warning be careful that the employee you are promoting meets the minimum qualifications you have listed on the job description for the position. Since promotion is a reward for better than average service, you should also be able to document that the employee you are promoting has had better than average evaluations in the lower level position. This is especially important if more than one employee has expressed an interest in being promoted to the higher position.

**Disciplinary procedures:** If it is necessary to discipline an employee what steps will you take? What is your disciplinary process? This topic will be covered in more detail.

**Grievance procedures:** Employees may perceive a personnel problem differently from their supervisor. Because of this, employees should have a procedure to follow when they feel that they have not been treated fairly. The policy should clearly state the steps an employee must take when filing a grievance procedure.

**Procedures to terminate employment:** To protect yourself, clearly lay out what procedures you will follow when terminating an employee. We will talk about termination when we discuss discipline.

## Hiring

If you are a city or county library, contact your county clerk or human resources office for advice. They can be of great assistance in this process and can even provide templates and applications. Where possible rely on the work of your local government officials. This will save you time and generally helps you follow the law correctly.

Use your job descriptions as a basis for hiring. To avoid discrimination or any appearance of discrimination, all job openings at the library should be advertised. The advertisement should briefly describe the position and the minimum requirements. It can also include the anticipated starting salary. You can also request a resume, if you would prefer that.

The only exception to hiring in this manner should be when you promote from within your library. This process should be addressed in your personnel policy and you should only promote *qualified* employees.

**Application Forms:** The application form, in addition to asking for name, address, and telephone number, should ask for information that will tell you how well the applicant meets the minimum requirements and the desired traits of the person holding the position. It should not ask for unnecessary information that could lead to a charge of discrimination. Such information would include race, marital status, number of children, pregnancy status or religion. In other words, if you don't need information in order to evaluate the person's ability to do the position's work, don't ask for it. A reasonable deadline for applications should be set.

MCA 39-29-101 through 39-29-112 spells out a requirement that military veterans be given some preference for hiring for public employment in Montana, which means that you should ask for veteran status on your job applications.

MCA 39-30-201 gives preference to persons with disabilities. The code states that a public employer shall hire a job applicant who is a person with a disability over any other applicant with substantially equal qualifications who is not a preference-eligible applicant.

## Interviewing

From the written applications, the top three to five applicants can be chosen to interview. The interview should help you explore the applicants' qualifications further. You do not have to hire the person who gets the highest score on the written application; the interview can be used as a separate test of an applicant's suitability for the job. As with the written evaluations, an objective way of scoring these interviews should be worked out before the interviews take place. Each applicant should be asked the same basic set of questions during the interview process. A written evaluation of each interview should be made immediately after the interview is completed.

Here are some general guidelines for interviewing:

- Set aside a period of time for the interview. Make sure you will not be disturbed.
- Put the applicant at ease. Remember how nervous you were when you last interviewed.
- Ask questions that cannot be answered "yes" or "no". The applicant should do most of the talking.
- Have a general "game" plan for the interview. Concentrate on the qualities of the applicant and her/his suitability for the position. Then provide details of the position, the conditions of employment and information about the library itself. If you do the opposite, the applicant can slant his answers to fill your needs. Others contend that the applicant should be given a brief overview of the library and the position, and then asked what s/he could bring to this position. Do what feels right to you. Just be consistent for each applicant.



- What is the applicant's perception of library work? If it's not realistic, can this person handle what library workers really must do? Does the candidate want to work and learn? Will this person be positive, productive and part of the team, or negative, unproductive, and difficult to work with? Is the candidate willing to work the schedule at this location? If the first group of candidates doesn't produce anyone you are satisfied with, don't be afraid to start over.

**Sample Interview Questions:** Make sure you are only asking questions related to the person's ability to meet the job requirements. Here are examples of questions you can ask and questions you should avoid. This is not an exhaustive list.

Why do you want this job?

- Why do you want this job?
- What qualities do you have that you feel would help you in this position?
- What skills or talents do you possess that you feel qualify you for this position?
- If I asked former employers (or teachers) about you, what would they say? Why?
- What part of your last job did you enjoy the most? (Or for those with limited work experience, what was your favorite class or teacher?) Why?
- What part of your last job did you enjoy the least? (Or for those with limited work experience, what was your least favorite class or teacher?) Why?
- What are your strengths?
- What are your weaknesses?
- What would you do if a patron came into the library angry? How would you handle the situation?

Never ask questions which have nothing to do with the job, such as:

- Are you married? (Or variations, such as what does your spouse
- Do you have any children? (Or variations, such as who will stay with your children while you work?)
- Will you be driving to work?
- What church or social groups do you belong to? (Or variations designed to ascertain membership in controversial or questionable organizations, political preferences, etc.)
- Are you taking any medications? (Or variations designed to ascertain the physical and mental health of the individual.)
- Do you need the family plan insurance? Do you live alone? (Or variations designed to ascertain the individual's lifestyle.)

When the decision has been made and the person you have chosen has accepted the position, it is a matter of courtesy to inform other applicants of the decision. This is usually done with a short note through the mail.

Such a note should simply state that the position has been filled, and it should wish them luck in their future job search. You should *not* explain your decision in the note. All applications and evaluation materials should be kept on file.



## Job Evaluations

Some libraries conduct evaluations for new employees after their first six months on the job. Whether or not this is your policy, each person in the library needs to hear about their performance from their immediate supervisor at least once a year. When you are conducting a job evaluation, you are not evaluating the person; you are evaluating how well they do the job. There should be two components to a job evaluation. The first is a written evaluation on how well the employee accomplishes all the different desired results of the job. The desired results should be found in the job description. The employee's immediate supervisor should write this evaluation. Both negative and positive evaluations should be explained in writing. Some libraries also have employees evaluate themselves on the task elements in writing. They then compare their self-evaluations with the evaluations of their supervisor.

The second part of the process is a conversation between the supervisor and the employee about the written evaluation. This discussion allows the employee to respond both positively and negatively to the written evaluation. If there are problems, the employee can talk about these and sometimes a mutually satisfying solution can be found. For example, a negative comment about an employee's speed in performing a task might be explained by the employee as a result of poor equipment. If there is agreement on the issue, the written evaluation should be amended. If there is disagreement, the employee should be allowed to tell their side of the story in writing, and this document should be placed in the employee's file.

One common mistake that supervisors make in evaluating employees is to withhold the truth about problems, based on a desire "not to hurt their feelings." This mistake has two negative results. First, it means that employees will not improve their performance; because no one has told them they are not meeting expectations. Second, if disciplinary action ever becomes necessary, it will be harder because there will be no documentation that there have been long standing problems. It is more difficult to discipline employees if you have never told them there is a problem. Nothing in the formal evaluation should be a surprise. Think of it more as a summary of the year. If an employee is having problems, let them know right then. Don't wait until the formal evaluation to tell them.

## Discipline and Termination

*Progressive Discipline:* Except in extreme cases, such as when someone has endangered patrons or other staff members, the library should use a progressive discipline approach to employees who are having problems. One of the most important tools for preventing discipline problems is setting clear standards and expectations for performance - not only in what tasks should be accomplished and how they will be measured, but also our expectations of how we will treat each other and our library's users.

A progressive discipline approach begins with relatively mild measures of discipline, and proceeds to more serious steps if the problem is not corrected. The emphasis of this approach is communication and giving the erring employee a chance to improve. Some typical steps in progressive discipline are as follows:

- **Informal Discussion:** The supervisor discusses the problem with the employee informally, trying to understand the problem and reach a mutually acceptable solution.
- **Oral Warning:** The supervisor warns the employee that their behavior is unacceptable, and that if improvements are not made other action will be taken.
- **Written Reprimand:** The supervisor writes a formal reprimand, copies of which are sent to the employee and the supervisor's superior. The reprimand describes the problem and consequences that might occur if the problem is not corrected. The reprimand is placed in the employee's file. At this point, there may also be some outside intervention from the supervisor's superior.

- Suspension: The employee is sent home for a specific period of time. They are not paid for the time missed. The employee should be afforded notice of the allegations and an opportunity to be heard prior to suspension without pay. A note explaining the action is placed in the employee's file.
- Termination: The employee is fired. The reasons for firing are documented and placed in the file, along with a summary of the history of the progressive discipline process.

## **Grievance Procedures**

We talked about the importance of having a type of grievance procedure. Employees need to have a method of expressing concerns or differences. Employees should be told to follow the procedures. Sometimes an employee may try to go directly to the library board rather than the supervisor on staff. Board members should be informed of any staff problems when this might happen, and they should be reminded of the proper procedure.

Your library may have to follow a labor union's grievance procedure. If so, then you can skip this next part. If you don't have a procedure, then you may want to keep reading. Grievances should be filed in writing. The first step in the grievance procedure usually is fact finding and mediation between the employee and supervisor, if it is warranted. Fact-finding and mediation should be done by a superior in the organization, or if that is not possible by a competent, disinterested outsider. In small libraries the library board usually mediates. If it is found that the grievance was warranted, appropriate action should be taken.

If it is found that the grievance was unfounded, the supervisor should be warned not to take retaliatory action. If the grievance involves an ongoing dispute involving disciplinary action against the employee, the normal disciplinary procedures should continue.

## Important Employment Laws

This is the last part of this chapter. We cannot cover all of the employment laws that might affect your library. We will give you a short description of a few employment laws and what they do.

These descriptions are not intended to fully explain the law, but to send up some “warning signals” of areas that you should be concerned about.

- **US Department of Labor - Minimum Wage Information** (<http://www.dol.gov/dol/topic/wages/minimumwage.htm#doltopics>)

**Minimum wage - federal and state:** Almost all library workers will fall under the federal minimum wage laws. Make sure that you are paying them at minimum wage or more.

- **Fair Labor Standards Act (FLSA)** (<https://www.dol.gov/agencies/whd/flsa>)  
**Fair Labor Standards Act (FLSA):** This includes the federal minimum wage, and it also lists requirements for overtime pay and compensatory (comp) time. It also prohibits covered employees from contributing volunteer hours to their place of employment. The Fair Labor Standards Act also includes child labor provisions, which set certain limitations on the use of juveniles as employees. If you use students under 18 years of age as pages, you should be aware of these restrictions.  
**Federal Equal Employment Opportunity Law** (<https://www.eeoc.gov/laws-guidance>)
- **State and Federal Civil Rights Laws:** Prohibits employers from discriminating on the basis of race, color, religion, sex, or national origin in hiring, promotion, and other employment policies.
- **Federal Age Discrimination Act Information** (<https://www.eeoc.gov/statutes/age-discrimination-employment-act-1967>)  
**Age Discrimination Employment Act (ADEA):** Prohibits employers from discriminating on account of age. The protected age group is 40 years old and older.
- **ADA Home Page** (<https://www.ada.gov/>)  
**Americans with Disabilities Act (ADA):** Strengthens prohibitions on discrimination against the disabled and requires employers to make their facilities accessible to the disabled and to make reasonable changes in their accommodations for the employment of disabled people.
- **U.S. Immigration Support** (<http://www.usimmigrationsupport.org/irca.html>)  
**The Immigration Reform and Control Act:** Requires that employees complete an I-9 form within three days of starting work, verifying their identity and authorization to work.

Employers may condition an offer of employment on the successful applicant’s completing the form but may not specify what documents must be used to complete the form.

- **Federal Family and Medical Leave Act** (<https://www.dol.gov/agencies/whd/fmla>)  
**The Family and Medical Leave Act (FMLA):** Allows employees to take up to 12 work weeks of paid or unpaid leave for certain medical and family reasons. It requires that employees taking such leave be allowed to return to their original job or an equivalent job with equivalent pay, benefits, and other employment terms and conditions.

## Policies and Procedures

Policies set the direction for the library and protect it from misunderstandings. They are broad, philosophical guidelines that address personnel, collection management, operations, program development and intellectual freedom.

A good policy gives you and your employees guidelines, as well as protection. In the event of a problem, you'll have more leverage if you have a good policy in place. Written policies are an excellent training tool for new employees, and the public responds to what they perceive as a clear statement of authority. When library staff can show customers a written policy about the problem, customers tend to respect the library's policy.

- **Personnel Policy:** Includes job descriptions for all library staff, evaluation criteria, job expectations, information about salaries, benefits, etc. Please note that if you are not a district library, you need to work with your city, county, or school to ensure that your personnel policy matches theirs when it comes to shared benefits like retirement, time off, and health insurance.
- **Collection Development Policy:** Describes what kinds of materials will be selected, how will they be selected, how donations will be handled, how collection maintenance will be done, and how the library will respond to complaints about materials.
- **Operational Policies:** covers library hours, loan periods, how to deal with overdues.
- **Acceptable Use Policies:** who has the right to use the library without charge, what types of behavior are acceptable and what types are not. It may set special conditions for the use of library resources. A good example of this is an Internet Use Policy.
- **Special Policies:** are specific to your library. If you have a genealogy collection, you may want to develop a policy for how it can be used, who can use it, etc.

If you don't have all of the policies, start slowly. Writing good policies takes time. Give yourself, library staff, and trustees plenty of time to discuss a policy. Be sure to ask for staff input. They will have to explain the policy to customers, so they can add real value to the process.

Library policies should be based on community needs, the library mission statement and established goals; they should not be a reaction to specific problems that arise.

### 4 Tests of a Good Policy

1. It's legal - the policy complies with all local, state, and federal laws.
2. It's fair - the consequences of violating the policy should not be excessive.
3. It's clear and concise - the language should be clear enough that the average person can understand the consequences. It should also be clear enough that staff members can enforce the policy.
4. It's consistent - the policy should apply equally to everyone. It should not favor one group over another.

[See Appendix](#) for a list of possible policies

## Procedures

Earlier we talked about procedures being practical rather than philosophical. Think of them as a way to keep your library running smoothly. They are very important for training new staff, so you should make sure you have the necessary procedures and that they are kept up to date.

Procedures don't have to be fancy or long. Your library probably already has some procedures, and hopefully even has a manual. Putting all of your procedures in one manual makes them easy to find. If your library doesn't have procedures written down, work with library staff to develop some. The person who does a particular job should be the one to write the procedure. Although procedures don't need to be approved by the library board, it can still take time to develop them. What procedures typically need to be included in a manual?

- Opening and closing the library
- Circulation: check-out, check-in, etc.
- Interlibrary Loan
- Ordering materials: how? who?
- Receiving/processing new materials
- Collecting statistics
- Setting up board meetings
- Special events, such as story time
- Other special procedures, such as reserving the meeting room
- Emergency procedures: who to call in the event of an emergency, what to do
- Budget preparation
- Summer Reading Program
- Annual report
- Use of library meeting room

By now you should have observed that these procedures cover routine tasks. Tasks can be done daily, weekly, monthly or even annually. Some of these tasks may require special forms. Be sure to include a copy of the forms in the procedure's manual.

## Finances Overview

Public libraries must have stable funding to continue serving the community. Public library funding comes from local, state and federal sources. Private funding sources, however, are also important. The major source of public library funding in Montana comes from local property taxes, either through a specific mill levy or an appropriation from general funds. In this chapter, we will discuss the different funding sources, and how to budget and track library finances.

### Funding the library

The Board is responsible for ensuring that there are adequate funds for all operations of the library. This vital function requires that Board members:

- Understand library funding laws
- Have a knowledge of funding sources
- Develop a working relationship with the appropriate governing body Be willing to seek prospective funding sources for the library
- Ask other libraries how they meet their funding needs Explore ways of sharing resources with other libraries Explore community resources
- Be innovative

Sound financial management by the Board of Trustees, in cooperation with the Library Director, is crucial to ensure ongoing library services for the community. To prepare a budget, you need to know where the funds come from and how much revenue you can expect each year. In Montana, public library funding comes from local, state and federal sources. Private funding sources are also important.

### Local Funding sources

The major source of public library funding in Montana comes from local property taxes, either through a specific mill levy or an appropriation from general funds. State law allows the governing body of a city or county with an established public library to levy a special tax in the amount necessary to maintain adequate public library service if an increased mill levy is approved through a vote of the people.

In addition, emergency mill levies can be used as a source of funding for special needs. The timeline below outlines the steps and timing necessary to pass a mill levy.

Libraries that receive funds from mill levies are eligible to receive prorated money from sources other than property taxes as well, such as ancillary taxes including motor vehicle taxes, oil and gas production taxes, motorcycle fees and so on. State law also allows the governing body of any city or county, or a combination of the city and county, to establish a library depreciation fund. This money can be used to acquire property, make capital improvements and purchase equipment necessary for library services. City or county funds allocated to the library but not spent at the end of the fiscal year can be applied to the Library Depreciation Reserve Fund. The library board must request establishment of this fund.

Support for libraries differs considerably among cities and counties in Montana because taxable valuation and the amount levied varies from place to place. Initiative 105, passed by Montana voters in 1986, significantly compounded funding problems for libraries by freezing the level of local property taxes from which public libraries receive most of their funding. To obtain more local support for your library, you may wish to ask the public to vote on a special mill levy for the library. Running a library mill levy campaign is a time-consuming task, but worth it. You'll receive a much-needed boost to your budget if you are successful and will be able to offer better services.

The Board can explore local options with the city or county budget officer and should consider reviewing MCA [15-10-420](#) and [15-10-425](#) for more information on running a mill levy.

## Suggested Mill Levy Timeline

Month	Activity
January-March	Library Director and Board of Trustees define goals and prepare a budget for the upcoming year, determining if an exceeded mill levy election will be needed.
April-May	Trustees communicate with city or county commissioners about the budget and need for the additional mill levy.
June-July	Board of Trustees seek out the legal requirements and ballot language.
August – September	Trustees recruit for Board/citizen’s task force and appoint task force members.
October – December	Task force identifies funding sources and develops the petition*. Task force presents recommendations to the trustees. Trustees adopt task force recommendations and support petition.
January	Task force circulates petition*, which must be signed by at least five percent of the resident taxpayers. Trustees meet with city or county clerk to review ballot language. Trustees and commissioners meet to discuss petition and election. Trustees and task force hold an informational meeting about the adopted mill levy vote.
February	Library Board files petition* with governing body at least 90 days prior to the general election. Task force recruits a citizens' campaign committee.
March-May	Citizen's campaign committee prepares facts, fliers and other materials; holds information meetings for the public; and implements other steps in publicity campaign.
June	Election**
	<p>* Petition may not be required if local governing body handles the entire process by its power of resolution.</p> <p>**Develop comparable timelines for elections not in June by working back from the date of election.</p>

## State funding sources

There are two state funding sources for Montana's public libraries: The Information Access Montana Act (IAMA) and the Coal Severance Tax. Libraries must meet certain standards in order to receive state funding.

State aid to public libraries is provided through the Information Access Montana Act (IAMA) passed by the Montana Legislature in 1989. The act is designed to broaden access to existing information by strengthening public libraries, augment and extend services provided by public libraries, and permit new types of library services based on local need. The Montana State Library Commission administers IAMA.

IAMA funds may not take the place of general operating funds. The law allows the Commission to withhold these funds when there is a reasonable link between the reduction in local funding and the receipt or expectation of IAMA funds. In such cases, the reduced funding from a mill levy or local government appropriation must be less than the average amount the library had received from these sources the preceding three fiscal years.

IAMA has four components. Per capita and per square mile is most important. This aid is based on a population distribution formula (See [MCA 22-1-327](#) or [ARM 10.102.4003](#)). The amount of money received by individual libraries can change as the population distribution changes. These funds are distributed annually, and the local libraries receive the money by early November.

The other three components are not active at present but include:

- Statewide interlibrary resource-sharing program (See [MCA 22-1-328](#) and [ARM 10.102.4001](#)). These funds have recently been going to OCLC and MSC. This law is being looked at for increased funding and diversification in upcoming legislative sessions.
- Statewide library access program (See [MCA 22-1-329](#))
- Base grants. (See [MCA 22-1-331](#) or [ARM 10.102.5106](#))

## Coal Severance Tax

In 1979, the Montana Legislature designated that a portion of the state severance tax (See [MCA 15-30-108](#) or [ARM 10.102.5102](#)) on coal mining go to the library federations to help local libraries provide basic services. The federation libraries receive the annual funds by early November. Each federation submits an annual plan of service to the Commission for approval that details how the funds will be spent.

Libraries that receive state aid must comply with the [public library standards](#). Please contact the Montana State Library for assistance with complying with the public library standards.



## Federal Funding Sources

On occasion, federal grants for specific programs become available for libraries. Trustees and directors can learn about these and other grant opportunities through library literature.

Two of the most common sources of federal funds for library services in Montana are the Library Services and Technology Act and the Telecommunications Discount Program (E-Rate).

### Library Services and Technology Act (LSTA)

The LSTA grant program is designed to serve all types of libraries: public, academic, research, school, special and consortia libraries. Administered by the Institute of Museum and Library Services (IMLS) agency, LSTA provides annual funding to all state library agencies to "develop library networks to share library information resources across institutional, local, and state boundaries and to reach those for whom library use requires extra effort or special materials."

The act also authorizes a national grant competition for education and training, research and demonstrations, preservation and digitization, and models of cooperation between libraries and museums. In addition, IMLS provides grants to improve Native American and Native Hawaiian library services.

In Montana, the State Library Commission administers LSTA grant funds. The amount of money received each year varies; depending on the funding LSTA receives in each federal budget. The funds awarded to Montana are used for State Library programs such as the Talking Book Library, consulting, lifelong learning, and continuing education services, and for statewide cooperative projects such as Montana Library2Go, Montana History Portal, and Montana Shared Catalog.

### Telecommunications Discount Program (E-Rate)

(<https://www.usac.org/e-rate/>)

Since 1997, the federal E-Rate program has provided Montana libraries discounts on eligible telecommunications services ranging from 20 percent to 90 percent, depending on economic need and location. It is administered through the nonprofit Universal Service Administrative Company (USAC), which was established by the Federal Communications Commission (FCC) to implement the Telecommunications Act of 1996. The Schools and Libraries Divisions of USAC administers the schools and libraries program.

The determination of economic need is based upon the percentage of students eligible for participation in the national school lunch program. Libraries use a weighted discount percentage, which includes figures for all the schools in the school district in which the library is located.

Eligible services include internet access, and acquisition and installation of equipment to provide networked access to internet services. To apply for E-Rate discounts, a library must meet the Montana Public Library Standards. To receive discounts on services or equipment, a library must comply with **Children's Internet Protection Act**.

Libraries that wish to receive federal funding in Category 1 or 2 must comply with both CIPA and the Neighborhood Children's Internet Protection Act (NCIPA). CIPA requires use of a technology protection measure (often referred to as a filter) on any computer that can access the Internet, including staff computers. Any public library using E-Rate or LSTA funds for certain purposes must comply with the filtering requirements. Filtering is not required when a library receives funding for telecommunications only. Although filters must be installed on every computer that can access the Internet, adult users can request that the filter be removed.

Therefore, the State Library recommends that libraries purchase filters that can be disabled.

## Other Funding Sources

As funding needs increase, many libraries seek grants from foundations, corporations, endowments and government agencies. Local businesses are another option. Library boards can solicit funds from these businesses directly or determine if the business has a community support program.

You and your library board might also want to explore partnerships with civic organizations for special products or fund-raising activities. Potential partners include community service clubs, the League of Women Voters, local youth groups, and many more.

## Library Foundations

Library foundations can be a valuable funding tool to encourage gifts, bequests, memorials, and other monetary donations. The foundation board and staff also represent an important partnership for the library. A local library foundation can be of immense help, but open communication is the key. You and the foundation need to work in concert for the good of the library.

A library foundation functions as a separate entity and can attain nonprofit status from the Internal Revenue Service, so that gifts are tax deductible for the donors. Establishing a library foundation also opens up funding potential from other foundations that do not give grants to tax supported agencies.

## Budgeting

Once you know where your funding comes from and how much you can expect, you can prepare the budget. Budgeting is vital to the library operations and planning.

The budgeting process includes the following steps:

1. Define the library's goals for the upcoming year based on the library's long-range plan. What does the library really need? Base the budget on those needs. The budget will change as the goals change.
2. Gather information to project costs of providing services and meeting the year's goals.
3. Estimate potential income from taxes, gifts, fines, fees, grants and any other possible source of income.
4. Compare costs and income to see if all the goals can be met. If income exceeds or equals costs, the budgeting process continues.
5. Adjust objectives if funding doesn't cover goals, or search for additional funding. Approve written budget and present it to the funding body.

The Board and the director work on the budget together but, ultimately, the Board is responsible for its approval and will typically present it to the entity with funding authority, within the required time frame and procedural steps. It is important for Board members to support the budget and speak out for library funding.

As in any planning activity, it is important to establish a schedule. Once you know where funding comes from and how much you can expect, you can begin to prepare the budget. Budgeting is vital to the library's planning process and one of the most important Board functions. A comprehensive, balanced budget cannot be compiled overnight. Allow adequate time for planning, gathering information, reviewing goals and producing a finished product that will allow the library to meet the community's needs for library services. The schedule below shows specific steps for building the budget. You may have a different schedule at your library. This is simply a possibility for building your library's budget.

## Sample Budgeting Calendar Based on a July 1 to June 30 Fiscal Year

Month	Activity
<b>July</b>	Review fourth quarter budget report.
	Review goals, objectives, and strategies for past fiscal year
	Make adjustments for present fiscal year if needed.
<b>August</b>	Review final annual report for just-ended fiscal year.
	Approve and submit it to appropriate governing body
<b>September</b>	Begin work on needs assessment for next year.
	Brainstorm approaches.
	Delegate follow-up effort (director, committee).
<b>October</b>	Review first quarter report.
	Evaluate objectives and strategies in progress.
	Review previous fiscal year audit.
<b>November</b>	State aid is received.
	Review present costs and projections.
	Review current needs assessment; brainstorm possibilities for responses.
	Reach agreement on prioritized needs.
	Assign further research if needed for June reporting.
Obtain and review information on projected revenues for coming year.	
<b>December</b>	Review goals and objectives for present year.
	Establish goals and objectives for the coming year based on staff, community and other input, as well as agreements of previous month.
	Distribute goals, objectives with request for appropriate strategies and budget requests.
<b>January</b>	Review second quarterly report.
	Review strategies and budget requests.
	Prioritize by objectives established in November.
	Library board should assign committee (if not already done) to work with director to prepare draft budget for board review.
	Reconfirm projected revenue information.
<b>February</b>	Board should review draft budget prepared by director and committee.
<b>March</b>	Board should consider holding a public hearing on draft preliminary budget.
	Adopt preliminary budget.
<b>April</b>	Submit preliminary budget request or certified budget to funding body.
<b>May</b>	Continue to work with submitted request or budget.
	Review third quarter budget report.
	Adopt final budget for next year and submit it to appropriate authority.
<b>June</b>	Review and finalize any adjustments in closing out the present year.

## Following the Money

The library board has responsibility and final control over the library's expenditures. Although the library board should delegate the power to purchase materials, supplies and other goods to the director, the board needs to be aware of purchases and should monitor the budget throughout the year.

The library director should provide the board with a monthly statement that shows at least the following:

- Monthly income
- Total income for the year
- Cash on hand
- Monthly expenditures by budget category
- Cumulative expenditures for the year by budget expenditure
- A list of library accounts, including checking and savings accounts, and certificates of deposit.

The director and board review the reports, looking for yearly patterns of expenditures, such as energy bills in the winter, fees for building repairs or grounds maintenance in the summer, special program costs such as those associated with summer reading programs and purchases of supplies and materials that occur once or twice a year.

The monthly budget review is a good time to compare budget figures with actual amounts. Did the library get the expected income? If not, it is important to find out why and make adjustments in the budget if necessary. Compare actual expenditures with budget amounts as well. The library director should be able to explain discrepancies.

If costs are greater than expected, the Board might have to adjust the budget. It's also important to know why funds are not being spent. Perhaps an under spent book budget means the staff does not have the time to make book selections, and that funding more staff is becoming a priority.

## Community partners

Just as the public library promotes the common good of the community, so too can the community work to promote the good of the library. Friends of the Library and volunteers can be wonderful assets to a library. Both groups help the library build a network of library supporters and both can help library staff accomplish more. In this chapter we'll talk about how friends and volunteers can help, how to recruit them, and how to manage them. Try talking to other libraries about their success with friends and volunteers. Your public library colleagues probably have the best hints and tips.

### Friends of the library

In many Montana communities, citizens who support the public library have established Friends of the Library organizations. A Friends of the Library group is a nonprofit organization that voluntarily supports library causes and services. Each group has its own bylaws, board, committees and policies, and sets its own goals.

A Friends group can help assess your library's strengths and weaknesses, provide financial and moral support, and advocate for the library and its cause. Friends do not have a policy-making role; they are meant to help improve and extend services.

The Friends can serve as publicity agents for the library, sponsoring cultural and educational programs, as well as advocates for the library with local government. They can develop and coordinate volunteer services in cooperation with the library director and staff; organize fund-raising events; and encourage donations of materials, as well as bequests and endowments.

It is important to work closely with the Friends group to ensure that the goals of these volunteers are consistent with those of the library. The Friends' role can be enormously important, especially in small libraries with very limited budgets.

To prevent public confusion or misunderstanding about the role of the Friends group, the library Board needs to clearly communicate its needs and expectations of the organization. In some communities, a trustee is appointed to act as a liaison to the Friends to ensure coordination of the group's activities with library policies and goals. In turn, a member of the Friends group might be invited to attend Board meetings.

### How to organize a Friends group

- Determine the purpose of the Friends. Are they needed to raise money? Volunteer at the library? Advocate for the library? Provide public relations? Or are the Friends a way to get the community involved?
- Select a steering committee to develop a Friends group. The committee should be composed of people from different backgrounds who have diverse skills, including PR experience, leadership skills, and knowledge of the law.
- Friends need to be tax-exempt; otherwise they will have to pay taxes on any money they make. A lawyer can help with this process.
- Define dues structure and membership categories. Can families join? Individuals? Businesses?
- Decide on how you will publicize the Friends. Through a brochure? Posters? What artwork or logo will be needed? How will information be distributed?

- Begin a campaign drive to recruit members. As much as possible, include trustees, elected officials, and other important people in the community.
- Decide on a tentative schedule for the first year. This helps recruit members, because they can join committees.
- If Friends are raising funds for the library, set goals and objectives. People like to know where their money is going.
- Set your first meeting date. Make the agenda brief.
- Develop a long-range plan for the Friends and re-evaluate it periodically.

These are the steps for organizing a new Friends group, but what if the library already has one? Perhaps the Friends group is faltering or has pretty much disappeared. United for Libraries has created a list of steps you can take to revitalize your Friends.

### **How to revitalize your Friends**

- Define problems. Confidentially ask dropouts why they are leaving.
- Give a party for members and past members only. Make it fun and have refreshments and music. It should have a relaxing atmosphere and any excuse for having one will do.
- Be sure to include dropouts and ask people to do small things. This will help get people to the party. Have them bring food, for example.
- Send out pre-event and post-event publicity with photos and names. This shows appreciation for the Friends and advertises it as a fun and meaningful group.
- Use the information gained from dropouts and current members to re-think goals and objectives. Perhaps the Friends needs to go in a different direction.
- Reorganize the board to reduce the stress of having too much to do.
- Review the benefits of the membership. Does the Friends reflect the community?
- Review communications to members. Are they being informed of what is going on? Open lines of communication are important for any group. Consider enrolling new members as a year-round effort. This adds new blood to the group and helps keep the Friends fresh.
- Appreciate and recognize people.

## **Volunteers**

Recognition is important to volunteers. Volunteers can enrich the library by helping staff reach beyond what they normally do. Although volunteers can help with filing, shelving, etc. think beyond those boundaries. Remember volunteers are people with varied interests who may have some special talents that would enhance your library. Here are some things to consider, if you are starting a volunteer program.

### **Volunteer programs**

Enlist full board and staff cooperation. For the program to be successful, both board and staff must believe in its value. If they do not, volunteers will pick up on this and will not remain at the library. Review with board and staff all library activities to see if a volunteer work program would be of help to the library in meeting goals and objectives. Sometimes volunteers aren't really needed, while at other times (like during summer reading) volunteers are necessary. Taking the time to think about what the goals are, volunteers can be utilized more effectively.

Assess activities and specific tasks to see where volunteer assistance could most properly be utilized. Take the time to plan what areas volunteers will work in and what they can do. This will save time and frustration.

Appoint a volunteer coordinator. If the library is small, the director may be the coordinator. It is important that someone is responsible for working with the volunteers and making sure things are running smoothly.

Prepare job descriptions for volunteer tasks. Just like a paid employee, it is important that volunteers know what is expected of them. A job description can also help you pinpoint what you need.

Establish who will supervise each volunteer. In a small library this is pretty easy to do. Try to choose someone who is good at working with people and is comfortable with volunteers.

Establish evaluation measures for continual feedback on volunteer job performance. Volunteers also like to know how they're doing. This doesn't have to be a formal process, but something should be in place. It's important to keep track of how well the volunteer program is working.

Prepare policy and procedure guidelines for volunteers. A well-written policy about volunteers and their use in the library will keep everyone focused.

Develop orientation and training programs. It is important for volunteers to receive some type of orientation. An orientation to the library will make them feel more comfortable. Training is necessary to make sure they perform their tasks correctly and it can also be a perk. Maybe the volunteer would like to learn more about searching the Internet and a class is being offered to staff. By including volunteers, they feel more a part of the library and earn rewards for their help.

Plan formal recognition programs. Volunteers need to be recognized and appreciated. A formal program is a great way of publicly acknowledging their contributions. It's also important to recognize them informally. A simple thank you can go a long way.

Here's an easy way to acknowledge the importance of your volunteers: Give volunteers name tags to wear. It adds a professional aspect to volunteering, and it's helpful for customers.

### **Recruiting volunteers**

Think about why people volunteer. Maybe they would like to meet new people or want new challenges. Understanding a person's reason for volunteering can help identify potential candidates and possible volunteer projects. Think outside of the normal volunteer routines. Many libraries ask volunteers to shelve and/or file. If people want to have more human contact in this time of computers and machines, asking someone to read at story time may be the best way to enhance a volunteer's experience at the library.

Many volunteers can be recruited by word of mouth. Talk with frequent library users and find out their interests. Ask volunteers to let others know about volunteering activities. Put up flyers or posters that talk about what volunteers can do for the library. Ask school clubs to do community service work in the library. The National Honor Society, Key Club, Business Professionals of America (BPA), and many other organizations require members to do community service projects. Be creative. Consider starting something like a homebound program, where trusted volunteers will deliver books to those who cannot leave their homes. A great volunteer can organize this for you and supervise others in doing this.

## **Managing and Keeping Volunteers**

Clear communication is important. Volunteers and staff must work together and listen and learn from each other. Make volunteers feel welcome and as if they are a part of the library.

Be sensitive to what the volunteer brings to the library. Each person has certain expectations, skills, and talents.

Recognize volunteers and find ways to involve volunteers in supporting, stimulating, and recognizing each other.

Work with volunteers to plan training and support. Volunteers can indicate what support and training they need. Be sensitive to the types of trainings or experiences the individual will best respond to and be selective and focused when providing that training. We all learn differently and respecting those differences can make the experience positive for both the library and the volunteer.

Be alert for opportunities within a volunteer's assignment to offer experiences for growth and challenge. Volunteers like new challenges. They get tired of only filing or shelving books. If a volunteer is becoming bored, try to find ways to make his/her job more interesting.

Enable volunteers to grow. Like staff members, volunteers want to feel appreciated and that they have gained something from a position.

In planning with a volunteer, allow for a loss of learning and momentum in part-time work. Volunteers have busy lives and other projects, so sometimes they may forget something or lose their drive.

Ensure that volunteers understand library jargon and traditions. This is where orientation is important. Make volunteers feel like a part of the organization and they may find it easier to understand why things are done the way they are.

Encourage initiative and experimentation. Volunteers bring new eyes to the library. If they think of a better way to do something or wants to try a new project, listen carefully. The volunteer may be on to something that will improve the library. If they are, let them take the initiative in seeing something through.



## **Marketing and Public Relations**

Libraries can offer so much to the local community, but part of our job is educating our community about what we offer. Marketing is about understanding our community's needs and wants, and then showing how the library meets those needs and wants. In this chapter, we will discuss the library's image, publicity, programming, and community relations.

### **Marketing the library**

Marketing means different things to different people. Some think it is advertising, others think planning events, while still others see it as public relations. It is all of those things and more. You can think of marketing as a broad range of activities that tie together the following four "Ps."

Planning: developing an array of services (products) that the public (customers) wants  
Publicity: telling customers about the services

Public relations: taking part in activities that help users and non-users develop a positive attitude about the library

Politics: advocating for the library with elected officials  
Everyone at the library has a role to play in these areas.

### **Planning**

All efforts to market the library are based in the library's mission and long-range or strategic plan. In developing a plan, the Board has analyzed how the library can best support the needs of the community and developed services and facilities in response. Customer service is at the bottom of all communications and services at the library, and it is important for library directors and boards to be aware of how customers experience the library.

### **The Library Image**

What do people see when they go to the library? What do both users and non-users think of the library? Developing a positive image and creating a warm, welcoming place is important. If a library doesn't have either of these then all the publicity and programming in the world won't make any difference. If people perceive the library in a negative light, nothing will bring them into the library.

So how can your library team develop a positive image and make the library inviting? One of the best ways is free! Library staff must practice excellent customer service skills. An inviting smile, and a greeting when customers come in the door makes huge difference in how people perceive the library. Don't forget the telephone: staff members should always be courteous on the phone.

Customers who call deserve the same professional and positive experience as those who walk in the door.

Library Staff should receive training in customer service and the various library departments. It is important for staff to understand the basics of every department in the library. Someone working in circulation can then explain the process of adding a new book to a questioning customer. Having this basic knowledge can make staff members feel more confident and appear more professional and competent to customers. The best form of advertising is word-of-mouth from satisfied customers to others.

Once a welcoming service environment has been created, look at the physical aspects of the library. Are there directional signs that make it easy for people to find what they are looking for? Are policies and information materials about library services and regulations readily available to the public?

Does the library look neat and clean? Is it comfortable? Think of places you have been that have made you feel welcome and if possible, incorporate those ideas into your library. Bright colors, simple directions, comfortable surroundings, simplicity, and a willingness by staff to serve with a smile will give your library a positive image.

## **Publicity**

For many of us, marketing and publicity is the same thing, but marketing and publicity have different components. Publicity is using newspapers, radio stations and other techniques to inform people about the library. Publicity can mean everything from a press release to an image advertising campaign. Whatever form it takes, it is important that the library be visible throughout the community. Directors and trustees can be part of this by bringing the library up in conversation.

Whether talking to friends or having informal conversations with local officials or business people, a conversation is a good opportunity to build awareness about the library and its services.

Directors and trustees can also give formal presentations about the library to service groups and other organizations, write letters to the editor of the local paper and carry library literature to give out when an opportunity arises.

The library can develop bookmarks, flyers, and newsletters. These should be simple, colorful and useful. Typically, this is a time intensive but less expensive way of marketing the library. What kinds of information should these items have? The library hours, phone numbers, story time hours, and special events are all good for this type of publicity. Have these items available at the service desks. People can pick them up or staff members can hand the items out.

Book lists, displays and exhibits typically address a certain subject. Book lists give people an idea of what books the library has on a topic. Displays and exhibits can do this as well. The difference is the visual impact. While book lists may list several items, the displays and exhibits let people actually look at the item. A formal display can focus on a particular topic or books can be displayed throughout the library. Choose eye-catching covers that make people want to check a book out. For exhibits, work with other local artists and students. This works to the advantage of both groups, since both get a chance to do some publicity. Plus, this is helpful for developing positive public relations and highlighting the importance of the library as a community center.

Advertising in the newspaper, on the radio or television is more formal, but has the potential to reach non-users. It's important to develop good relations with local media. Find out when the deadlines are and what the procedure is for inserting something into the newspaper or on a radio or TV station.

Human-interest stories are the best, both for the media format and for your audience. We relate to stories about people and their experiences with the library more than we do stories that are just about the numbers. Photographs of library events and people add to the story and are very important.

Library events can also be included in the newspaper community events column, which is usually free.

A library website or social media is another way to promote the library. Think of a website or a social media site as giving patrons access to the library 24 hours a day. Even in a small library, there are valuable things that can be added to the library's online presence. First, it's a place to list hours,

phone numbers, and contact information. Library services and how to get library cards can also be described. A link to an online catalog can be included so patrons can search for items from home.

With some online catalogs, patrons can even reserve items, see what they have checked out, and place ILL requests.

The library's website or social media site can also include information about special events coming up in the library, recommended sites, exhibits featuring local information, and lots of other useful stuff. The only limitation is how much time the library can devote to designing and maintaining the library's online presence.

Be creative in how you publicize the library. It can be the difference between a well-known and well-used library and one that is not.

## **How to talk about the library**

Speak to your listener's interests, not your own. For example, if you are speaking to someone who loves to hunt and fish, it doesn't do much good to talk about the library's collection of craft books.

Don't give out false information. Be sure of your facts. If you don't know the answer to a question, tell the person that you'll find out and get back to them.

Don't make assumptions about what your listener knows. Don't use library jargon. Make sure you listen as well as talk.

Be positive about the library, even if you disagree with something that is happening at the library. Being negative about the library gives a poor impression of the library; discussions about library problems should be conducted in the director's office or boardroom.

To talk effectively about the library, trustees need to be very familiar with the library collection and services, attend continuing education programs and visit other libraries. In addition, the library director and trustees should know the community, participate in civic activities, and serve on local committees to gain insight into the needs of people in the community.

## **Public Relations**

More encompassing than publicity, public relations (PR) implies two-way communication - not only does it mean providing information about the library, but it involves gathering information as well.

A PR campaign involves four basic steps: research, planning, communications and evaluation. First, in the research phase, the library assesses attitudes of various target groups toward it. Next is the development of a written plan that includes a clear description of who the library wants to reach with the campaign, a timetable, short- and long-range goals of the campaign, staffing requirements, a budget and how success will be measured.

After the plan is completed, the director communicates the message to the identified target groups. Publicity tools might include press releases, newspaper articles and photographs; radio and television public service announcements (PSAs); community group newsletters; displays, exhibits, and special events; billboard space (donated); printed materials such as bookmarks, booklists, flyers, brochures and posters; and personal contacts.

At scheduled points during the PR campaign and at the end of the campaign, the process is evaluated using the measurement factors identified during planning.

Policies and procedures for PR programs vary, depending on the size of the library, its financial resources, the number of staff and other local circumstances. The role of the trustees in these

programs, however, is consistent: be prepared to speak to the issues, participate in events, and communicate with local leaders and organizations about the library.

## **Media Relations**

Typically, the director serves as the spokesperson for the library, and the Board chair serves as the spokesperson for the Board. Designating a media spokesperson can save the Board from unintentional and sometimes destructive misunderstandings.

Should a reporter call an individual at home to get a response to a particular issue, for example, redirecting the reporter to the spokesperson will ensure that the Board's agreed-upon message is the message the reporter receives. The director should keep the spokesperson informed of all potentially newsworthy issues as they develop.

## **Programming**

Programming is yet another way of marketing the library and improving public relations. It can offer new services to library users and even draw in non-library users. Many programs can be done for free or at a low cost. While many libraries have story time and summer reading programs, programming is unique to each library. Remember to keep your community in mind as you decide what types of programming to offer.

## **Community Relations**

Working with the community to build a better library is important. Directors and trustees should get out into the community, either by speaking at local civic clubs, joining the Chamber of Commerce, or by helping other local groups. Getting out of the library helps the library director and trustees meet non-library users who may be able to share ideas on how to make the library more welcoming for them. When giving presentations about the library, take bookmarks, flyers, etc. along. It helps people remember the library when they take something home with them.

When other local groups are offering programs, help them out by providing bibliographies, having displays in the library, or offering to loan them book collections. Ask community groups for specific assistance in promoting a project or program. Be sure to offer them help when they need it. In these times, communities must work together. Libraries and community groups can help each other out and in doing so help improve community relations.

The public library should try to work with the school system. We're all aware of times when teachers assign homework without realizing the effects on the library (public or school). The library can work with the school librarian and the school's teachers to create a better environment for students.

Library staff members can visit classes, give library tours, or help out with special teacher loans of materials and reserves. The library can also work with parent groups.

## **Politics**

Because libraries depend on public funds, politics are a fundamental part of marketing the library. Library Board Trustees have a duty to advocate on behalf of the library and the citizens who use its services. Extending local public relations activities to elected officials shows them that public libraries are a factor in creating and maintaining sustainable communities.

When there are specific issues you ask these officials to act on, the advocacy role becomes that of a lobbyist. It is in this role that trustees are the personal face of the library. Although the library director and staff are also advocates of the library, political decision makers may view them as biased participants who have a personal, professional and economic stake in the library. A trustee, on the

other hand, has the credibility associated with being a citizen who is voluntarily providing a community service.

### **Advocacy involves:**

- Getting to know officials at all government levels and helping them learn about the library.
- Speaking out about what libraries do for the officials' constituents.
- Assembling facts and translating them into action.
- Planning and presenting evidence of need for a law or appropriation.
- Trustees can make a difference because they:
  - See the library from the user's viewpoint.
  - Have a perspective on the full range of public services.
  - Represent a broad base of consumers.
  - Are volunteer participants in government.
  - Vote.

The need to advocate for the library to elected officials is ongoing throughout the year. Contact them on a regular basis. Invite them to special programs and ask for their input on long-range planning issues. By building relationships with officials, they will be informed and aware of the vital role the library plays in the community.

## **Strategic marketing Checklist**

### **The Role of the Director and Library Staff**

- Develop the annual marketing plan and budget.
- Evaluate marketing efforts and regularly report on these to the Board.
- Plan staff training on marketing efforts.
- Analyze public relations needs, plans and budget
- Assess public attitudes toward the library.
- Develop rapport with media, community groups, writers, artists, business leaders and other libraries.
- Coordinate special activities with community groups.
- Actively promote the library on television, radio, in newspapers.
- Provide friendly service to all members of the public.
- Attend appropriate training and continuing education events.
- Interpret library policies, procedures and services to the public.
- Maintain community awareness.

## Appendix 1: Deadlines

MONTH	DEADLINE
JANUARY	E-Rate Form 471 Window Opens- changes annually, watch USAC for date
FEBRUARY	Complete preliminary budget E-Rate last date to begin filing process for upcoming funding year (Form 470)
MARCH	Adopt preliminary budget E-Rate Form 471 Window Closes-see January
APRIL	Submit preliminary budget to funding body
MAY	Director's evaluation Review library policies Federation Plans of Service due
JUNE	Close out budget for current year Complete Board evaluation for past year Adopt and submit final budget for upcoming year
JULY	Public Library Standards form due Federation Grant Agreement form due Board orientation for new trustees E-Rate Form 470 Filing Window opens
AUGUST	Approve and submit federation report to MSL Governing body approves and adopts final budget
SEPTEMBER	Federation Annual Reports due
OCTOBER	E-Rate Deadline for most libraries to file Form 486 to begin funding and invoicing/BEAR deadline for previous funding year
NOVEMBER	MSL Public Library Annual Statistics data due State aid received
DECEMBER	

## Appendix 2: A Policy List for Public Libraries

The following list of policies may be relevant to your needs. It is arranged in the form of an outline to show how policies relate to one another.

1. Mission and Role Statement
2. Board Bylaws
3. Public Service Policies
  - a. Eligibility for borrowing and services
    - i. Resident and nonresident
    - ii. Programming and outreach
  - b. Collection Management Policy
    - i. Mission and goals with community description
    - ii. Responsibility for selection
    - iii. Selection criteria for each format
    - iv. Scope and priorities of collection
    - v. Selection procedures and vendor relations
    - vi. Evaluation, weeding and maintenance
    - vii. Censorship, access and challenged materials procedure
    - viii. Intellectual Freedom Statement, Library Bill of Rights
    - ix. Gifts and donations
  - c. Circulation Policy
    - i. Loan period and renewal
    - ii. Confidentiality
    - iii. Reserved material
    - iv. Fines, damages
    - v. Interlibrary loan
    - vi. Special collections
    - vii. Audiovisual equipment
    - viii. Fees
  - d. Reference Policy
  - e. Facilities Policy
    - i. Hours of operation
    - ii. Americans with Disabilities Act compliance
    - iii. Security
    - iv. Meeting room use
    - v. Exhibits and displays
    - vi. Copiers and other equipment use
  - f. Community Relations Policy
    - i. Cooperative borrowing agreements
    - ii. Relations with schools
    - iii. Volunteers
    - iv. Friends groups
  - g. Patron Behavior Policy
    - i. Unattended children
    - ii. Respect for staff, users and library property
  - h. Internet Use Policy

- i. Management PoliciesGeneral
  - i. Responsibility and authority
  - ii. Budget, accounting and financial management
  - iii. Procurement, including gifts
- j. Personnel
  - i. Responsibility and authority
  - ii. Job descriptions and classifications
  - iii. Salaries and benefits
  - iv. Hours, annual and sick leave, overtime, holidays
  - v. Hiring, termination, resignations and nepotism
  - vi. Performance evaluation and promotion
  - vii. Continuing education/professional development
  - viii. Discipline and grievances
  - ix. Americans with Disabilities Act compliance
  - x. Fair Labor Standards Act compliance
  - xi. Sexual harassment
  - xii. Personnel records
- k. Facilities
  - i. Responsibility and procedures for maintenance
  - ii. Acquisition and ownership
  - iii. Insurance and liability
  - iv. Emergency preparedness
  - v. Americans with Disabilities Act compliance
  - vi. Use of equipment, vehicles, etc.