

LIBRARY POLICIES HANDBOOK



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Introduction

The Public Library Standards required by the Montana State Library state that “the board adopts and regularly reviews policies that reflect the mission and goals of the library. The policies govern use of the library, its materials, and services. No single policy goes more than four years without review.” (Administrative Rules of Montana 10.102.1158)

This rule corresponds to the statute outlining the powers and duties of public library boards.

MCA 22-1-309: Trustees – powers and duties.

The library board of trustees of every public library shall:

adopt bylaws and rules for its own transaction of business and for the government of the library, not inconsistent with law

Why are policies important?

Policies set rules and expectations for how the library will be governed and used. Good policies help library staff meet the library’s mission by allowing them to maintain services in ways that are consistent and fair so that everyone can enjoy the library as intended. Good policies can also offer protection to the library in the event of legal action against the library.

Your policies allow you to enforce the rules that make your library an orderly and welcoming place for everyone. The privilege of using a public library requires a willingness to respect the rules set by the library board, as stated in MCA 22-1-311 (emphasis added):

Use of library – privileges.

Every library established under the provisions of this part shall be free to the use of the inhabitants of the city or the county supporting such library. The board may exclude from the use of the library any and all persons who shall willfully violate the rules of the library. The board may extend the privileges and use of the library to persons residing outside of the city or county upon such terms and conditions as it may prescribe by its regulations.

Some Public Library Standards requirements, such as hours of operation and internet access, may also be addressed through your library’s approved policies.

Policy categories

Areas covered by policies include:

- Library operations: fines/fees, hours of operation, how people can use the library and its resources, library patron confidentiality, public access to resources
- Collection development: why the library selects, accepts, or withdraws the materials it does for its collection
- Code of conduct: ensuring a safe and welcoming environment in the library for everyone
- Personnel: in compliance with all applicable employment laws, these policies should cover everything that is entailed in a person's employment and performance evaluation at the library.
- Legal requirements and standards: open meetings law, patron privacy, public library standards, public participation and public comment; public records request policy

Four qualities of a good policy

A good policy should meet each of these four criteria:

- Reflects the library's mission and community needs
- Is current, comprehensive, and consistent
- Is easy to access and implement
- Complies with laws and regulations

Where to start when considering a new policy

When considering whether to add a policy, ask:

- Why do we think we need this policy?
- What could be the consequences of creating this policy?
- Would it be difficult to enforce?
- Does this issue happen frequently, or is it a rare occurrence? If it's rare, it may not be useful to create a formal policy.
- How would this policy help us meet our goals?
- How would this policy help us serve our community's needs?

Policy development steps

- If you have determined that you do need a policy, you may not need to reinvent the wheel. Most public libraries have their policies posted on their websites. Many communities need to address the same issues. Your colleagues' policies can be great resources for adapting language for your own policy needs.
- As you draft a new policy, define any terms that might be vague, such as “unacceptable use” or “inappropriate behavior.” What is unacceptable to one patron may not seem unacceptable to another, so be as specific as possible.
- Fine tune and draft language for your policy. Before formally adopting ask:
 - What does this policy say about the library?
 - Does this policy suggest that your library is a safe and welcoming space? Or does it discourage patrons with unnecessary rules?
 - Can the language in the policy frame the issue in a positive way that reinforces your reasons for having the policy?
 - Can you ask your community members for their feedback on this draft policy?
 - Trustees adopt policies, but the library staff must be able to reinforce them. Can you ask your staff for their feedback on this draft policy?
- It's important to review your policies every few years because things change, and we want to make sure that our policies still reflect the needs of the library and the community.

Legal considerations

Policies are legal statements adopted by the board. It's a good practice to reflect on these questions as you review a policy:

- Is our policy legal? It's best to ask your local attorney about this if you're not sure.
- Is our policy clear and concise?
- Are the consequences reasonable and measurable?
- Is this policy fair to everyone?

Policy approval process

- First draft of the new policy is prepared by the policy committee or by the director with input from the board
- Or – the current policy is reviewed by the policy committee (see below for more information about reviewing policies)
- Any new policies or policy changes must be discussed and approved at a publicly noticed meeting. Be sure to include the drafts in your meeting materials for the public to review before the board votes.

What to include

Policies are public documents. Include:

- Name of library
- Name of policy
- Date approved or reviewed/revised by board

Implementation

Post your policies to your library website if possible; at minimum, keep copies readily available at the public desk for your staff and patrons to review.

Internal communication of a new or updated policy:

- Update your policy manual
- Publish and distribute policies internally
- Train staff on the policy's intent and how to enforce it

External communication:

- Notify the public if this policy will affect their use of the library. This might entail posting the new or updated policy to your website, in public spaces within the library, and perhaps even on a handout (for example, if your circulation policy changes, it might be useful to provide a handout to patrons when they check out items).

Reviewing policies

Schedule a regular review cycle for the board. Public Library Standards require that a policy is reviewed at least once every four years. If a policy under review is still working well for the library, great! You don't need to make any changes. Simply document that the board reviewed the policy on that date and that no changes were necessary.

Which to review first?

Your library may have a long list of policies, some of which may be long overdue for review. Where to begin? Start by considering which policies, if any, address an urgent, or time-sensitive, issue in your library. Then, consider what policies are most important to your library's operations and staff.

Urgent policy changes:

Urgent means that there is an immediate, time-sensitive issue that needs to be addressed through policy as soon as possible. Perhaps there is a recent change to the law, to your agreement with the city or county, or to city/county policies that needs to be reflected in a library policy. The board may prioritize policies when there is a time-sensitive issue to be addressed, even if that policy has been recently reviewed.

Important policy changes:

Important means that the policy may not be urgent but that it has a profound impact on library services. For example:

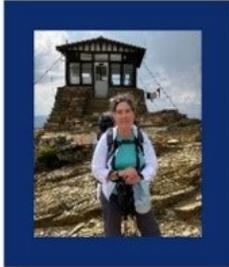
If your library has switched to a new catalog system, you may need to update your circulation policies and procedures to match your new everyday practices.

If your library is adding a brand new service or physical space within the library, such as a new meeting room or a makerspace, you may need to consider whether the library's current policies cover use of that new service or space, whether those policies need to be updated to include the new service or space, or whether you need a brand new policy to address unique considerations pertaining to the new service or space.

- When reviewing previously approved policies, ask yourselves:
 - Is the policy working as expected?
 - If not, how should it be modified?
- How will we know if the policy is no longer necessary?
- Does the policy still comply with the law? Has any legislation passed since the last review date which would make the policy inconsistent with the law?
- See the appendix for a policy review template.

Questions? Contact us!

Your Montana State Library Consultant is happy to discuss your policy questions and goals with you. Please don't hesitate to reach out if you need assistance.



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Appendix

Template for Reviewing Library Policies

Title of Policy	
Date of Adoption or Update	
Who is the policy for?	<input type="checkbox"/> Board <input type="checkbox"/> Internal/Staff <input type="checkbox"/> Library Patrons
Rate the importance of the policy to daily operation	<input type="checkbox"/> Very important <input type="checkbox"/> Important <input type="checkbox"/> Neutral <input type="checkbox"/> Somewhat Important <input type="checkbox"/> Not Important
Rate the difficulty of enforcing the policy	<input type="checkbox"/> Very difficult <input type="checkbox"/> Difficult <input type="checkbox"/> Neutral <input type="checkbox"/> Somewhat difficult <input type="checkbox"/> Not difficult
Is the policy required?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know
Does the policy clearly state expectations and consequences?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know
Does the policy clearly state who is responsible for enforcing it?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know
Does the policy clearly state how to provide comment or suggestion for improvement?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know
Does the policy balance library resources and service to the public?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know
Does the policy favor service to the public with available library resources (staff/budget)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know
Have the statutes cited in the policy, if applicable, been updated or replaced since the last review?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> I don't know