

Library Director Handbook



MONTANA
STATE LIBRARY
A GREATER STATE OF KNOWLEDGE

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Getting Started

New Library Directors

Suggestions for the first few days on the job

- ☐ Get to know your staff. 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 to introduce yourself.
- ☐ Create a calendar with important dates, such as contract dates, insurance expiration dates, dates of local significance, and deadlines.
- ☐ Meet with area librarians to learn more about your region.
- ☐ Connect with State Library staff to learn more about MSL services and the Montana library community.
- ☐ Register for an OKTA login and set up your ASPeN account.
 - OKTA is the State of Montana's service to authenticate users of state information systems.
 - It's important to create a unique OKTA account for yourself, using a different email address than the former director, to ensure that your CE credits don't get mixed up with the previous director's credits. Please contact State Library staff if you need assistance.

My MSL Consultant's Name	Email Address	Phone Number

Certification

The Montana State Library certifies public library directors, who must be certified in order for the library to meet the current public library standards and receive state aid funding each year. Public library directors must earn 60 hours of continuing education credits every 4 years.

As a new director seeking initial certification, you need to obtain the following credits:

Initial Library Administration Certificate

- 60 continuing education credits earned in a 4-year period
 - 30 credits in Library Administration Category
 - 30 additional elective credits in any category
 - Library Services to the Public
 - Collection Management and Technical Services
 - Technology

After your Initial Library Administration certificate is earned, you will work on certification as a renewal.

Renewal Library Administration Certificate

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

Once you have 60 credits you can submit for certification in ASPeN.

Visit the MSL Certification webpage for more information.

ASPeN is a source for

- Continuing education events
- Directory information for Montana's libraries
- Continuing education credit tracking for certification
- Meeting information and materials for the MSL Commission, advisory councils, and other committees.

My Certification Track Start Date	My Certification Track End Date

Continuing Education

There are many opportunities for you and your staff to keep learning, including the following recommendations (some may require creating a free account).

- Federation meetings are regional meetings for public librarians and trustees in your area, held in the spring and fall. Read the Federations section of this handbook for more information.
- The Montana State Library offers free continuing education in a variety of ways
 - [ASPeN Event Calendar](#) – find and register for Montana State Library events. 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.
 - [MSL Learn](#) – Montana State Library’s online learning platform.
 - [MSL YouTube Channel](#) – find recorded sessions from CE events to watch at your convenience and then claim CE credits in ASPeN.
 - [Subscribe to the MSL Continuing Education Newsletter](#) – monthly updates with recommended CE activities.
- [Montana Library Association](#)
- [Mountain Plains Library Association](#)
- [Pacific Northwest Library Association](#)
- [WebJunction](#)

Trainings offered through your municipal or county government are another very good source for continuing education. Staff training days offered at your library are another way to claim independent learning credits. Montana State Library staff can help you claim continuing education credit for relevant trainings.

Next Federation Meeting Dates	Webinars to Watch on the MSL YouTube Channel	Conference or Workshop to Attend this Year

MSL Learn Online Courses

Your OKTA login credentials will get you logged in to [MSL Learn](#) to enroll in self-paced courses.

For each course you complete you will automatically earn a badge and you will be able to download a certificate of completion.

For those tracking credits for MSL Certification, credits are transferred to ASPeN at the end of each month for all course completions--no need to navigate between MSL Learn and ASPeN.

[A little more about badges](#)

There are several groups of courses you can take to earn special MSL Learn badges. A digital badge is a visual symbol of your successful effort. You can add them to a LinkedIn profile or other "digital wallets" to keep evidence of your continuing education effort. For MSL Learn, you earn badges for each course you complete and you can earn a badge for the New Director Course of Study

Complete all of the following courses to earn the New Director Badge and 13 credits will be added to your certification track

1. Montana State Library: A Greater State of Knowledge – 1 credit
2. Montana Library Law – 1 credit
3. Next Level Montana Library Law – 1 credit
4. Public Library Standards – 1 credit
5. Trustee Essentials: Responsibilities – 1 credit
6. Trustee Essentials: Understanding Local Government Budgeting and Finance – 1 credit
7. Trustee Essentials: Understanding Local Government and Its Relationship to the Library – 1 credit
8. Connecting with Local Government Officials – 1 credit
9. Hacking ASPeN: A How-to Course for Directors, Staff, and Trustees — 2 credits
10. Youth Services Overview – 1 credit
11. MontanaLibrary2Go – 2 credits

Courses to Take First Month	Courses to Take in 6 Months	Courses to Take by the End of the Year

Leadership and Responsibilities

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

Responsibility Area	Board	Director
Policy Making	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
Administration of the Library	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
Personnel	Employ library director and confirm staff appointments	Employ, supervise, and evaluate staff
	Develop or accept local government 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
		Work with local government and/or follow best practices for managing personnel records

Responsibility Area	Board	Director
Budget	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.
	Review financial reports and/or claims to monitor expenditures	Expend funds as agreed upon within the budget. Prepare claims. Review financial reports.
Board Meetings	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
Public Relations	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
Continuing Education	Read trustee materials and library related publications	Call significant materials to board's attention
	See that new trustees have orientation	Organize new trustee orientation

Responsibility Area	Board	Director
	Attend Federation and trustee-related meetings	Inform trustees of important meeting dates. Attend federation meetings.
	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
Planning for the Library's Growth	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 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

Responsibility Area	Need to Learn ✓	Where I Can Learn More
Policy Making		
Administration of the Library		
Personnel		
Budget		
Board Meetings		
Public Relations		
Continuing Education		
Planning for the Library's Growth		

Tips for Working Together Successfully

- Spend the first year building trust between the director, the board, and local government officials.
- Pick your issues carefully. The keys to working with each other are respect, communication, and tact.
- If the board makes a decision that 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.

Encouraging 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, productive, and respectful?
- Are the agenda items board-level or trivial?
- Is every board member encouraged to participate?
- Does another board member contact the missing members and encourage them to attend next time?
- Do you follow a consistent schedule and time frame for board meetings? Do you usually start and finish on time? Is the room comfortable? Can you provide inexpensive snacks and water?
- Is the meeting day and time convenient for your trustees most of the time?
- Are your meetings exciting and interesting? Do board members have an opportunity to brainstorm or plan for the future?

Working with 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.

For additional guidance on working with local government officials, please see the [Connecting with Local Government handbook](#) on the State Library's website.

Library Operations

Planning

The Long-Range Planning Process

“Long-range planning” usually means creating a plan for the next 3-5 years. Long-range planning should involve everyone in the community: trustees, staff, patrons, and non-users. Involving everyone in the process is time consuming, but doing so helps you and your board to create a plan that is relevant to the needs and aspirations of your community.

Preparing to Plan

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:

Have you recently reviewed the current plan?	Where are we now?	What are the community's needs and how can the library help meet those needs?
Where do we want to go as a community?	What needs to be done tomorrow? Next week? Next month? In the next 6 months?	What are the Strengths, Weaknesses, Opportunities and Threats (SWOT) you see in the community?
What would be helpful for you to learn about your community that you don't already know?	What data would be helpful for future planning?	Who is accountable for implementing your plan?
What aspects of strategic planning will you need to learn more about so you can update or create a successful plan?	Do you need a facilitator to help with the strategic planning process?	How can you support implementation?

For more information about strategic planning, please see the [Montana State Library's Strategic Planning](#) resources.

[View and discuss](#) the [Strategic Planning for Public Libraries video playlist](#).

Planning for Facilities

The Board needs to determine if the library facility meets the current needs of the community 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 Disaster

Disaster response and prevention is essential for the continuation of library business. A written disaster plan helps ensure the health and safety of the staff, decreases the amount of time it takes to begin recovery, and increases 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, and 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.

Standards

All Montanans deserve access to library services that meet their needs. The public library standards identify a base level of service that residents and visitors should receive wherever they are in Montana. To be eligible for state funding, libraries must meet the public library standards.

[The Public Library Standards](#) can be used to set goals and plan for the future. While the standards themselves define the 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.

[Visit the Public Library Standards webpage](#) for more information about current standards, operating procedures for reporting on how your library meets the standards, and other supporting resources.

Personnel Matters

Library staff is the most important resource you have. Your library staff will determine whether 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.

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 personnel matters.

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 have a personnel policy, it's best to use the policy of the local government office.

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.

[39-29-101 through 39-29-112, MCA](#) 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.

[39-30-201, MCA](#) 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?
- 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?)
- 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

Employees need to have a method of expressing concerns or differences. Employees should be told to follow the procedures set in your local government's grievance policy. 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.

Library 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.

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.

See the [Public Library Policies Handbook](#) for more information.

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 them. 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?

Typical Procedures	Have or Need?
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	

Typical Procedures	Have or Need?
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 library funding comes from local, state, and federal sources. Private funding sources such as grants and donations can also be 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

To prepare a budget and manage library finances wisely, you need to know where the funds come from and how much revenue you can expect each year. You also need to be aware of any restrictions on use of the funds and any reporting requirements.

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.

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, and motorcycle fees. 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.

More information about [mill levy campaigns and setting up a Library Depreciation Reserve Fund](#) is available on the Montana State Library website.

State Funding Sources

There are two state funding sources for Montana's public libraries: State Aid 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 Montana Legislature and 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 State Aid.

Funds provided through the Montana State Library may not take the place of general operating funds provided through your local tax base. Per capita and per square mile aid is based on a population distribution formula 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. (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.

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 in 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 and federation funds must comply with the [public library standards](#). Please contact the Montana State Library for assistance with complying with the public library standards.

Other Funding Sources

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.

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 supports the library's mission by providing financial support and advocating 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 and organize fund-raising events such as book sales.

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.

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.

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
July	Review fourth quarter budget report.
	Review goals, objectives, and strategies for past fiscal year
	Make adjustments for present fiscal year if needed.
August	Review final annual report for just-ended fiscal year.
	Approve and submit it to appropriate governing body
September	Begin work on needs assessment for next year.
	Brainstorm approaches.
	Delegate follow-up effort (director, committee).
October	Review first quarter report.
	Evaluate objectives and strategies in progress.
	Review previous fiscal year audit.
November	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.

December	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.
January	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.
February	Board should review draft budget prepared by director and committee.
March	Board should consider holding a public hearing on draft preliminary budget.
	Adopt preliminary budget.
April	Submit preliminary budget request or certified budget to funding body.
May	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.
June	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.

Additional guidance on [budgeting and finance](#) is available on the State Library's website.

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.

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 a huge difference in how people perceive the library. Don't forget the telephone: staff members should always be courteous on the phone.

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 media 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 businesspeople, 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, contribute to 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.

Advertising in the newspaper, on the radio or television 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. Most people relate to stories about people and their experiences with the library more than stories that are just about the numbers. Photographs of library events and people add to the story.

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

A library website is another way to promote the library and share information about using the library. Some libraries rely on a social media page to serve as their primary web presence. Although this may be easier than managing a website, make sure that your social media account is set to public access so that people who are not registered with the service can also view information.

How to Talk about the Library

Try to find out what your listener's interests and values are and focus your conversation on how the library's mission connects with those interests and values. You might also want to ask them what library services would be meaningful for them. It's okay if they bring up something that is outside the scope of what your library can provide right now. The point is to be a listener and show that you care about what the community thinks and wants from its library.

If someone asks a question, 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, and then be sure to follow through.

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. 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. It can be hard to stay positive during difficult times. If you can't say something positive, then simply focus on sharing the facts without adding your opinion.

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

Public relations (PR) implies two-way communication providing information about the library and gathering information as well.

A PR campaign involves four basic steps:

Research: First, in the research phase, the library assesses attitudes and needs of various target groups in the community.

Planning: 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.

Communications: After the plan is completed, the library 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.

Evaluation: 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.

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 Library Director and 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 Library'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. Many programs can be done for free or at a low cost, especially when you consider what partners or subject matter experts in your community might be willing to help out. Programming is unique to each library and the needs of the community you serve. 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. Meeting people and community groups outside of the library helps the library director and trustees gather outside perspectives on how to ensure that the library is meeting the community's needs. Some partnerships for the library to consider may include local organizations whose missions compliment the library's mission, other local government departments such as parks and recreation, public safety, and public health, and the local schools. Find time to visit with people from these organizations to find out if you have some shared goals that you can work on together.

It's important to develop relationships with elected officials and the staff who oversee and work for the city or county. These individuals can help you navigate the budget process, local issues, and challenges.

It is also helpful to include your library board in the process. 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.

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, and 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.

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

MLA is a statewide professional organization dedicated to supporting libraries, trustees, and library staff in Montana. MLA lobbies for legislation and funding related to Montana libraries, hosts continuing education events, 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.

[Visit the MLA website](#)

Wired-MT

Wired-MT is an email listserv for Montana library staff, trustees, and supporters, provided by the Montana Library Association through OCLC's listserv platform. Instructions on how to subscribe to Wired- MT is available at mtlib.org.

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 Montana State Library distributes funding from the legislature directly to each of the six federations.

Federations support library staff and trustees by providing continuing education opportunities, awarding monies, supporting collaborative efforts among the federation's libraries to improve library services, and offering networking opportunities. Many of the library directors in your federation have had similar experiences to yours and might be able to help you connect with regional resources.

At federation meetings, federation members network, receive training, and decide on the appropriate way to use the money granted by the state. Each federation elects a coordinator who is responsible for answering questions and providing guidance for planning.

[Visit the MSL Federation webpage.](#) for more information.

Library Laws

Because public libraries are supported by public tax dollars, they are subject to numerous laws and regulations. It is helpful for the director to be familiar with state and federal laws and understanding their consequences. When dealing with legal issues, work with your board to consult with the city or county attorney for interpretation of the law.

The Constitution of Montana [Article X, Education and Public Lands, 1(3)] directs the Legislature to "provide a basic system of free quality public elementary and secondary schools" and "other such educational institutions, public libraries and educational programs as it deems desirable."

Laws specific to libraries are contained in the Montana Code Annotated (MCA). In addition, there are a number of several Administrative Rules of Montana (ARM) that concern library operation and funding mandates.

[Free Public Libraries \(MCA 22-1-3\)](#)

The following items are addressed in this MCA chapter:

- Creation of a legal public library
- Mill levies, special library funds and bonds
- Authorization, allocations and investment of a library depreciation reserve fund Trustee appointment, compensation, and term length
- Board size, vacancies and election of Board chair powers and duties of trustees Board appointment of and compensation for the library director and staff
- Various laws covering city, county, and city-county libraries

Montana Laws

- [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](#) - 22-1-309 - this law covers the powers and duties of the public library board.
- If you are a district library, please see [MCA 22-1-707](#).
- [Library Records Confidentiality Act](#) - 22-1-1103 - Montana protects its citizens by making library records private.
- [Information Access Montana Act](#) - 22-1-325 - This act provides state aid to public libraries which is administered by the Montana State Library Commission. Two aid provisions in this act include the following:
 - [Direct State Aid to Public Libraries](#) - 22-1-326 - The per capita portion of the direct state aid to public libraries is distributed annually and is based on a formula using the library's service area size and population.
 - [Statewide Interlibrary Resource Sharing Program](#) - 22-1-328 - The purpose of the program is to administer funds appropriated by the legislature to support and facilitate

re-source-sharing among libraries in Montana. Currently this funding is used to reduce the costs of OCLC software (used to provide interlibrary loans) and to reduce the ongoing costs of the Montana Shared Catalog (MSC.)

- [Library Federations](#) - 22-1-331 - Public libraries that participate in federations are eligible for state aid monies that are awarded through the federation. Details include establishment of a federation, participants, benefits, governing board, resolution of disagreements, and administration of federation appropriations.

Many state and local laws not specific to public libraries will also be of interest to trustees. For instance, local zoning laws, parking restrictions, building codes and safety restrictions need to be considered. Questions about these and other laws can be directed to the city or county attorney.

Although your Montana State Library consultant is not able to provide legal advice, they can provide information about laws and guidance on how to seek legal assistance.

Federal Laws

Numerous federal laws affect public libraries. A selection of these laws of particular interest to trustees includes the following.

Employment Laws

US Department of Labor - Minimum Wage Information *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) 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

- ***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.
- **Age Discrimination Employment Act (ADEA):** Prohibits employers from discriminating on account of age. The protected age group is 40 years old and older.
- **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.
- **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.
- **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.

Appendix 1: Deadlines

MONTH	DEADLINE
JANUARY	
FEBRUARY	Complete preliminary budget
MARCH	Adopt preliminary budget
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 Board orientation for new trustees
AUGUST	Approve and submit federation report to MSL Governing body approves and adopts final budget
SEPTEMBER	Federation Annual Reports due
OCTOBER	
NOVEMBER	MSL Public Library Annual Statistics data due State aid received
DECEMBER	

Appendix 2: Montana State Library

The Montana State Library provides information, resources, and guidance to Montanans to help expand their knowledge and empower their decisions. We offer leading-edge data and applications, plus a dedicated staff, to help all people efficiently seek accurate and transparent answers about Montana.

[Read More About Our Work](#)

There are several newsletters you can sign up for to stay up to date on activities of various areas within MSL.

[Subscribe to Newsletters](#)

Montana State Library Commission

The Montana State Library Commission is the governing board of the Montana State Library. The Commission administers federal and state funds made available to Montana for library services, provides for library services for the blind and physically handicapped, sets standards for public libraries, and certifies library directors, staff, and trustees.

[Learn More About the Commission](#)

State Librarian

The State Librarian directs the Montana State Library, serves as executive officer of the State Library Commission, and oversees 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 programs or legislation necessary for effective library service to the people of Montana.

Library Services and Technology Act

In 1996, the Library Services and Technology Act (LSTA) replaced the Library Services and Construction Act (LSCA), which had been in operation since the 1950s. LSTA, which is administered by the federal Institute of Museum and Library Services (IMLS), helps states develop electronic networks among libraries. These networks make it possible for libraries to share information resources as well as provide library services to users with special needs.

LSTA funds are awarded annually and administered by the State Library Commission. These funds are used for State Library programs, such as the Talking Book Library and Library Development Department, as well as statewide projects such as the MontanaLibrary2Go and Montana Shared Catalog.

Patron and Local Library Development Services

The Montana State Library provides leadership and guidance to libraries in order to improve programs, services, and facilities.

MSL provides consulting services, continuing education opportunities, and learning programs for library employees across Montana. These resources, training sessions, and professional development opportunities help library staff meet the needs of their patrons and create thriving opportunities for their communities.

Consulting

Our consulting team supports successful libraries by providing guidance and training to library directors and trustees throughout the state. Statewide Consulting Librarians are assigned to individual public libraries within specified consulting territories. These territories are based on the six Library Federations.

Certification and Continuing Education

The Montana Library Certification Program was established to promote continuing education and to recognize librarians and trustees who continue to expand their knowledge and skills to provide improved services for patrons and communities. We provide a variety of opportunities to engage in continuing education for all library staff and trustees.

Lifelong Learning

The Montana State Library provides lifelong learning support to all Montanans through a combination of librarian professional development and training, program development, and meaningful partnerships. Lifelong Learning projects include sustained, long-term efforts in early literacy, virtual programming, and summer reading, as well as other topics such as health information, STEM programming, wildlife education, and civic engagement.

Montana History Portal

The Montana History Portal (formerly the Montana Memory Project) (MHP) supports the creation of, and provides free access to, digital collections of items relating to Montana's cultural heritage and government. Libraries, museums, local government agencies, and historical societies across Montana contribute content to the website.

Montana Shared Catalog

The Montana Shared Catalog (MSC) is a consortium of multi-type libraries and branches across Montana, allowing libraries to share an online catalog and system administrator staff. The libraries that enjoy the greatest benefit from MSC membership also participate in sharing groups in which library patrons can seamlessly place holds on items from dozens of libraries around the state and pick up the item soon afterward. This program is made cost-effective through the use of a courier service, in which crates of items are delivered from library to library.

Talking Book Services

The Talking Book program works with the National Library Service for the Blind and Print Disabled to provide free library services to Montanans who cannot read standard print due to a visual, physical, or reading disability.

The program aims to improve patron quality of life and offer ease of access to reading materials so that patrons have opportunity to educate themselves and become informed voters connected to society, make informed and healthy decisions to be productive in the workforce, and contribute to society.

Montana Library Network

In the late 1990s MSL became the first state to negotiate a contract for all libraries in Montana to make use of technology provided by the national organization, OCLC, to catalog library collections and to share their collections with other library patrons through interlibrary loan. Then in 2002, MSL created the Montana Shared Catalog. This consortium started with 17 founding members and has grown steadily to serve 210 libraries and branches. To date, Montana remains one of the only states to offer a statewide library catalog system. From there, Montana created a statewide platform for Montanans to download e-books, audiobooks and digital magazines called Montana Library 2 Go. Most Montanans know this service through the popular Libby app. As is the case with the MSC, Montana libraries share a single online platform and digital collection, saving significant staff time and resources.

Federation Grants

Montana's six library federations meet twice yearly for training and to develop plans of service through which they prioritize how to spend their federation grants to support collaborative library services. In particular, federation meetings represent an important opportunity to support library trustees which is a significant area of focus for MSL.

Public Library Standards and State Aid

MSL distributes funding to MT public libraries that comply with statewide standards set by MSL. Annually public libraries self-report whether they meet public library standards and/or request deferrals if they are unable to meet a standard for a particular reason. To receive a deferral, libraries must state how they intended to meet the standard within a specified period of time. Staff time is administering the reporting system, answering questions about the standards, and reviewing and considering requests for deferrals.

GIS, Data, and Information Programs

The Digital Library collects and provides access to multiple types of information of interest to state employees, federal partners, and the citizens of Montana.

Government Information

MSL makes a concerted effort to create citizen access to state publications to fulfill MCA § 22-1-212: "The state library shall administer a state publications depository library program to identify, acquire, catalog, preserve, and provide access to state publications."

Digitized publications are available via the Internet Archive and state web pages dating back to 1996 are archived at [MT.GOV Connect](#).

Montana Natural Resource Information System

Established in 1985 by the Montana Legislature, the Montana Natural Resource Information System (NRIS) was designed to simplify the task of identifying and acquiring natural resource information. NRIS's mission is to make information on Montana's natural resources easily and readily accessible.

Montana Natural Heritage Program

The Montana Natural Heritage Program (MTNHP) is the state's source for reliable, objective information and expertise to support stewardship of our native species and habitats, emphasizing those of conservation concern. MTNHP strives to provide easy access to information in order for users to save time and money, speed environmental reviews, and inform decision making. The MTNHP manages information on native and non-native species and biological communities which can be accessed on the Montana Field Guide, Natural Heritage Map Viewer, Species Snapshot, and Species of Concern web pages and applications.

Water Information System

Like the MTNHP, the Water Information System (WIS) is a program of NRIS and is designed to collect, manage and provide access to information about Montana's water resources and water supply and drought status. Also similar to MTNHP, WIS staff work closely with local, state, and federal agencies, to complement their work and make this work more efficient. For example, WIS staff have produced county drought status maps since 2002. This work has been done in partnership with the Natural Resources Conservation Service and serves as an archive of data about drought and water supply status.

Montana Spatial Data Infrastructure

The Montana Spatial Data Infrastructure (MSDI) is made up of 15 "framework" geographic databases vital for making maps of Montana and understanding its geography. MSDI datasets are generally accepted as the best available, standardized, statewide data that meet the essential, digital geographic information needs of Montana's citizens, its government, commerce, legislature, area researchers, and more.

Land Information

The Land Information program at the Montana State Library is responsible for several MSDI data sets including Mapping Control, Administrative Boundaries, Structures and Addresses, and Cadastral. Cadastral Parcels and Administrative boundaries are tied to points on the ground (a National Geodetic Survey benchmark, a survey corner, or building address). MSL works closely with partners including the Bureau of Land Management, surveyors and local governments, to communicate the importance of good data creation and sharing data so it can be used consistently for multiple purposes.

Information Products

MSL's Information Products team is responsible for maintaining MSL's website and web applications to ensure Montanans have seamless self-services access to the wide variety of online information applications supported by MSL. Over the years, MSL has transitioned from applications developed in-house to commercial off-the-shelf and semi-custom applications that are easier to maintain and upgrade as technology advances.

Statewide GIS Coordination

To most effectively create, manage and share GIS data, MSL needs local, state, and federal partners that actively invest in GIS. MSL GIS Coordination staff work closely with governments and agencies to create opportunities for standardization and collaboration. MSL also looks for opportunities to coordinate with partners not currently invested in GIS to make sure that those partners do not miss out on opportunities or new requirements like public safety and elections needs. MSL leads a multi-sector advisory council to inform the investment in Geospatial data development, coordination and communication. With input from the advisory council, MSL creates a geospatial information plan to outline internal work priorities and identify priorities for investment through the MGIA grant program. MSL staff also works closely with counterparts in other states and federal partners to make sure that MSL is following national standards, and that Montana maximizes opportunities for federal resources.

Montana Geospatial Information Act Grant program

The MGIA grant program has historically served to support the creation of local GIS data that contributes to the Montana Spatial Data Infrastructure. Due to the sharp decline in MGIA revenue no MGIA grants were awarded in FY 25 and MSL does not anticipate making grant awards for the foreseeable future.

Next Generation 9-1-1 Data Services

The State of Montana has actively worked to map structures and addresses as a function of public safety and emergency response since federal funding became available for this purpose following the 9/11 terrorist attacks. MSL's expertise in the data standards necessary to align location information with modern emergency response technology led to updates in Montana's public safety legislation in 2017. Following a study conducted by MSL about Montana's 911 GIS data readiness in 2018, the 2021 Legislature created a statutory appropriation to fund Next Generation 911 data development by local governments. With that funding MSL staff trains local

governments to create and update location information that complies with public safety data standards. MSL also administers software as a service contract that allows local governments to check their location information to make sure it meets the standards for public safety data readiness.

Montana State Reference Network

Montana State Reference Network (MTSRN) is the state-owned real time positioning network (RTN), operated with the cooperation of partners that include tribal nations, the Montana Department of Transportation, Montana State Library, counties, educational institutions and private entities who maintain, operate, or otherwise contribute to its operation. This growing statewide global navigation satellite systems (GNSS) network consists of permanently located global positioning system (GPS) receivers that generate real-time, high-accuracy GPS positioning.

Research Resources

MSL provides research and professional development resources for state employees and contractors as well as for Montana library staff.

Appendix 3: Public Library Standards

The following Administrative Rules of Montana constitute the standards public and accredited tribal college libraries must meet to receive state aid per capita and/or federation funding.

For more information visit msl.mt.gov or contact your library consultant.

10.102.1158 LIBRARY BOARD, GOVERNANCE, AND WORKING WITH THE DIRECTOR

(1) A public library is defined at [22-1-301\(3\)](#), MCA, established in Title 7, MCA, or an accredited tribal college library that provides service to the public. All libraries must comply with the standards set forth in ARM Title 10, chapter 102, subchapter 11.

(2) The public library board shall meet at least six times a year and shall comply with Montana's open meeting laws.

(3) The public library board members shall learn about the services the library provides to users, the role of the board in providing administrative and financial oversight, and the role of the board in planning for new services for users.

(4) The public library board shall receive at least three hours of continuing education each year.

(5) The public library board shall understand the revenue sources that fund the library, the budgeting process, and shall adopt an annual budget for the library.

(6) For a public library defined at [22-1-301\(3\)](#), MCA, and created under Title 7, MCA, at least 70% of the revenue shall be derived from local tax revenues. Grants, donations, and other revenue sources supplement but do not supplant local tax support. For an accredited tribal college library that serves tribal members, the tribal council shall recognize and support the efforts of the library to obtain funding.

(7) Public library boards and directors shall identify the requisite financial resources necessary to provide adequate library services pursuant to the library's mission and shall regularly communicate with community and local government leaders about financial needs and ability to meet community needs.

(8) The public library board, in consultation with the director, shall identify in writing what they want to accomplish in the next three to five years, and that plan shall be focused on meeting community needs. The board and director shall annually review their plan and progress made.

(9) The public library board shall adopt emergency response plans that ensure the safety of the public and staff as the primary priority.

(10) The public library director or designee shall submit the Montana Public Library Annual Statistical Report to the Montana State Library. The public library board and director shall annually review public library statistics.

(11) The public library board shall adopt and regularly review policies that reflect the mission, objectives, and goals of the public library. The policies shall govern use of the public library, its materials, and services. No single policy may exist more than four years without review.

(12) The public library board and director shall be familiar with the most current Public Library Standards Road Map maintained by the Montana State Library.

History: [22-1-103](#), MCA; IMP, [22-1-103](#), MCA; [NEW](#), 2021 MAR p. 1138, Eff. 7/1/22; [AMD](#), 2023 MAR p. 1858, Eff. 12/23/23; [AMD](#), 2024 MAR p. 605, Eff. 3/23/24.

10.102.1159 SERVING THE COMMUNITY

(1) The library is open during convenient hours. At a minimum, the library is open at least the following number of hours weekly:

Service Area Population	Minimum	Desirable
Fewer than 3,500	15 hours	25-40 hours
3,501 – 9,999	30 hours	40-50 hours
10,000 – 24,999	40 hours	50-60 hours
More than 25,000	50 hours	60+ hours

(2) Everyone has safe, comfortable, and convenient access to the library and its services.

(3) Everyone has access to updated and regularly maintained physical and digital library content and services.

(4) Everyone can find library materials online.

(5) Everyone has access to virtual and face-to-face programming.

(6) Everyone has access to information about local community and government activities that assists them with understanding local community issues and allows them to engage civically in the community.

(7) Children and caregivers have access to early literacy programming and materials either through the library or by being directed to another community organization that specializes in early literacy.

(8) Everyone has access to information about library programs and services through internal and external marketing efforts of library staff.

(9) Everyone has access to a library website or social media site.

(10) Everyone can obtain materials and services from another library through interlibrary loan services.

(11) Everyone has access to the Internet via wired and WIFI connections.

(12) Reasonable accommodations are made so that people with disabilities have access to the library's services.

History: [22-1-103](#), MCA; [IMP](#), [22-1-103](#), MCA; [NEW](#), 2021 MAR p. 1138, Eff. 7/1/22.

10.102.1160 PERSONNEL

(1) Staff members are offered health insurance according to local policy.

(2) Staff members are offered retirement benefits according to local policy.

(3) The board adopts a sufficient budget for continuing education.

(4) During 90% of open hours, paid staff are available to assist users.

(5) Staff have the tools and training they need to perform their work.

(6) The director is or will be certified by the Montana State Library within the required timeframe mandated by the certification program adopted by the Montana State Library Commission.

History: [22-1-103](#), MCA; [IMP](#), [22-1-103](#), MCA; [NEW](#), 2021 MAR p. 1138, Eff. 7/1/22; [AMD](#), 2023 MAR p. 1858, Eff. 12/23/23.

10.102.1162 DEFERRALS

(1) Any library may request, in writing, a waiver from the state librarian by July 25 of each year.

(a) The state librarian may grant a waiver of any of the standards in ARM [10.102.1158](#) through [10.102.1162](#) if the library:

(i) explains why the standard(s) is not being met; and

(ii) provides a compliance plan by which the library will meet the standard(s).

(b) State Library staff will work with the library director to decide upon a timeline for achieving the standard(s). The state librarian shall make the final decision on the amount of time the library has to comply with the standard(s) and will notify the library requesting the waiver of the decision by letter by October 1.

(2) Any library may request a one-year extension of the waiver from the state librarian in writing by July 25 of each year. The library shall provide the state librarian with an updated compliance plan with an explanation of why they cannot meet the standard(s).

(3) The state librarian may grant an extension for one year only. No further extensions will be granted.

History: [22-1-103](#), MCA; [IMP](#), [22-1-103](#), MCA; [NEW](#), 2021 MAR p. 1138, Eff. 7/1/22.