

PUBLIC LIBRARY FACILITIES HANDBOOK



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

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Introduction & Acknowledgements

The purpose of this handbook is to provide public library directors and boards with guidance and resources for a variety of facilities management and planning responsibilities, ranging from day-to-day facilities management to planning for major renovations or construction projects.

Throughout the handbook we have included quotes from experienced public library directors to help provide real-world insight into these topics.

The Montana State Library would like to thank and acknowledge for these contributions to the making of this handbook.

- Tiffany Christensen (Conrad Public Library)
- Abbi Dooley (North Lake County Library District – Polson)
- Mitch Grady (Livingston-Park County Public Library)
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- Dawn Kingstad (Glendive Public Library)
- Mark Wetherington (Bitterroot Public Library)

Where to Begin?

If you're brand new to your library, you may be wondering where to begin learning about the building and grounds that are now within your care. Here are some recommended first steps:

- Connect with the city or county's facilities person and ask them to walk through the building with you.
- Talk to library staff, the library board, and maybe the clerk or finance officer at the local government level to understand who has been responsible for what when it comes to maintenance and repairs.
- Find or create a document or spreadsheet that lists what small maintenance work needs to be done and when (read below for a suggested checklist).
- Consider hiring a structural engineer, architect, or work with your city or county to identify "big" maintenance work that needs to be done with estimates on how much it might cost.

Day-to-Day Facilities Management

A requirement of the Montana Public Library Standards is that everyone has safe, comfortable, and convenient access to the library and its services. Maintaining your library property is an ongoing project. Let's start with the day-to-day responsibilities before considering long-range plans and goals for your facility.

This checklist, produced by the Wisconsin Division for Libraries & Technology, may be helpful in scheduling routine tasks and maintenance.

Adapt this list to the needs of your library. If you aren't sure who is responsible for a certain task, ask your board, city, or county.

Sample Maintenance Schedule

Custodian

- M-F
- 7:00 a.m. – 12:00 p.m.
- Overtime as needed

Daily

- Mop restrooms – Custodian
- Mop vestibule tile – Custodian
- Scrub and disinfect all restroom hard surfaces, including mirrors, sinks and toilets – Custodian
- Refill bathroom products – Custodian
- Take out trash in public areas, restrooms, and service desks – Custodian
- Vacuum high traffic areas, including services desks, lobby, main walkway, PACs, computers, children's library - Custodian
- Fill coffee machine and stock coffee supplies – Staff
- Clean break room dishes – Staff
- Disinfect returned books with stains/slop on them – Staff
- Set up meeting room tables – Custodian and Staff

Weekly

- Clean glass entry doors - Custodian
- Vacuum offices, study rooms and carpeted meeting rooms – Custodian
- Vacuum and mop children’s program room - Custodian
- Take out trash in offices - Custodian
- Mop the reading room – Custodian
- Mop large meeting room - Custodian
- Change burned out light bulbs – Custodian
- Clean toys in children’s library – Staff
- Wipe down service desk – Staff
- Wipe down all electronics – Staff
- Wipe down counters, desks, cabinets, and empty pencil sharpeners – Staff
- Dust stacks – Staff

Biweekly

- Deep clean/sanitize restrooms
- Restock hygiene products, hand sanitizers, hand soaps
- Exchange entryway rugs - Contracted

Monthly

- Inspect and test safety items (flash lights, radio, fire extinguishers, defibrillator, first aid supplies) – Staff
- Inspect plumbing fixtures and pipes for leaks – Custodian
- Pour water down floor drains – Staff
- Check fire suppression system compressor and release valves – Custodian
- Clean and inspect upholstered furniture, spot clean carpet – Custodian

Seasonally

Winter

- Clear snow and ice from sidewalks – Parks & Rec Department
- Clear snow and ice from entryways – Custodian
- Clear light snow from entryways during extended hours – Staff
- Plow parking lot, alley, and book drop area – Streets Department

Spring

- Clean all windows – Contracted
- Shampoo Carpet – Custodian
- Mulch flower beds – Friends of the Library

Summer

- Water plants – Friends of the Library
- Mow lawn – Parks & Rec Department
- Dust stacks – Volunteers

Fall

- Inspect roof, flashings, brick, caulk, vents, signage, doors, and sidewalks for leaks, cracks or damage - Custodian

Biannually (Spring/Fall)

- Service HVAC equipment and change filters – Contracted
- Clean gutters – Custodian
- Update landscape plantings – Friends of the Library
- Adjust light timers – Staff

Annually

- Touch up painting and staining around building – Custodian
- Fire extinguisher charging and inspection – Contracted
- Fire code inspection – Fire Department
- Fire suppression system inspection – Contracted
- Inspect the parking lot for needed maintenance – Public Works Department

A building safety checklist is also included in the appendix.

Planning

Why plan?

A facilities plan can be used to more fully document your library facilities' current state and future needs. The plan may include the library's projected use and capacity needs; noted deficiencies in its current state; a schedule for inspections and maintenance; and an inventory of what works well and what doesn't work well at a more granular level. This plan may also help you to quickly compile a wish list in the event of financial windfalls and potential donors.

Planning and Budgeting for Ongoing Maintenance

Your maintenance checklist should help you to anticipate potential costs for routine maintenance and repairs. Review the past several years of your library's budget to estimate how much, on average, you might expect to spend on regular maintenance and repairs.

It may be tempting to delay maintenance work, but doing so can lead to more expensive repairs in the future. Here is one library director's story about delayed maintenance, the cost, and how they have begun to plan for maintenance work.

Before I became director, the main library had not had any significant building repairs for 28 years. Those before us believed they were fiscally responsible and financially frugal by putting off many repairs. The library was forced to become solely responsible for itself and opted for a specified library mill levy. The library won that mill levy by a large margin.

The library is currently installing an HVAC system. The project is worth \$155,000, and a private donor and multiple successful grant recipients secured the funds. We received \$35,000 from the county's capital improvement fund, but it was the first year that the library lost its share of the county's entitlement tax, so we lost funding.

We don't have access to county capital improvement funds. We've included around \$30,000 in improvements as part of our own regular budget. This involved telling the City Finance Officer what the plan was for those funds when we submitted our budget.

Library Depreciation Reserve Fund

In the event of unexpected costs or projects whose costs are expected to exceed what is allowable in the library's annual operating budget, a library depreciation reserve fund may help.

Our depreciation fund has mostly been used for our renovation project. We've also used it for big furniture and equipment purchases. We had to use a big chunk of it for a roof repair that was found in the course of construction.

We use our depreciation fund to pay for random big expenses, which we try to split with the city since they own our building. They lease it to us, but we have a collegial informal relationship. No hard terms documented for who pays for what. New roof, new air handler, new boiler.

The Library Depreciation Reserve Fund (LDRF) is a type of reserve fund specifically for libraries, as defined in Montana Code Annotated (MCA):

22-1-305. Library depreciation reserve fund authorized.

The governing body of any city or county or a combination of city and county in Montana may establish a library depreciation reserve fund for the replacement and acquisition of property, capital improvements, and equipment necessary to maintain and improve city, county, or city-county library services.

22-1-306. Moneys for library depreciation reserve fund.

Moneys for the library depreciation reserve fund are those funds which have been allocated to the library in any year but which have not been expended by the end of the year. Such moneys include but are not limited to city or county or city-county appropriations, federal revenue sharing funds, and public and private grants.

As the law states, a depreciation reserve fund is a separate dedicated fund which a library may use for one-time purchases and improvements for the library. This is similar to a capital improvement fund but has fewer restrictions on how the funding may be spent. This allows the library to set aside funds for future needs and long-term projects. It also gives the library board the full authority over the use of the funds.

Please review the Montana State Library's [Library Deprecation Reserve Fund Handbook](#) for more information.

Planning for the Future

A facilities master plan, like your library's strategic plan, is a road map that can help the board prioritize allocation of resources and fundraising efforts in order to ensure that the library and community have the facilities needed to meet future goals.

Questions to ask as you develop a facilities master plan:

- Does your library currently meet your community's needs in terms of:
 - Use of spaces (both indoors and outdoors)?
 - Capacity?
 - Safety?
 - Accessibility?
 - Functionality (efficient and reliable mechanical, plumbing, electrical systems)?
- How might your answers change in the next several years?
- What might your library need to add or change to meet your community's needs in the future? How will these changes impact your library's facilities?

Consider who else needs to help you answer these questions and whether conducting a community survey or discussion would be beneficial.

Whether you are working with an architect or with a local group of stakeholders to develop your plan, you may find it helpful to gather and review this information:

- Your community's growth projections
- Current funding sources and budget requirements
- Potential funding sources
- Long-term plans for your community and your library
- Drawings of your current facilities, if available
- Maintenance records

Disaster Planning

Emergency response plans are required for Montana public libraries. [ARM 10.102.1158 Library Board, Governance, and Working with the Director](#) states:

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

The following information is available for developing your library's emergency response plan.

Pick a place to start that is most urgent or relevant to you.

Potential Risks

Consider the following risks (if they are applicable to your area.)

- Fire
- Earthquake
- Flood
- Severe Winter Storm – what would you do if it looked like there was a severe winter storm that might strand people? (This might be especially applicable to any children who couldn't get a hold of parents or people who had no form of transportation.)
- Are you at risk for any kind of water damage from a broken main or pipes in the library? What would you do in that situation?
- Are you at risk for any major power outages? What would you do if you had a power outage that was going to last quite awhile?
- Are you at risk for any kind of sewer system backup?
- Are you at risk for gas leaks?
- Disruptive patrons – what would you do if you had a patron whose behavior was potentially a threat to staff and/or other patrons?
- Do you have a procedure ready in case of an active shooter event? Ask your local police for advice.
- Do you have a procedure ready in case of a public health emergency? Ask your local public health department for advice.

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 and serve as media spokesperson.

It is the director's responsibility to ensure that the staff is knowledgeable about emergency procedures, but trustees should be familiar with them as well. One of the Board members might

be responsible for having a copy of the disaster plan stored at home in case the library copy is damaged or is inaccessible.

Resources:

Pocket Response Plan Templates

- [The Pocket Response Plan](#) is a concise document for recording essential information needed by staff in case of a disaster or other emergency.

Ready.gov

- [Ready.gov YouTube Videos](#)
- [Ready.gov Plan](#)
- [Ready.gov Business Planning](#)
- [Ready.gov Risk Assessments](#)

Building Assessment and Planning for Construction or Renovations

At some point you may discover as part of your maintenance and planning processes that more substantial changes are necessary. The planning process for construction or major renovations typically starts with collecting community input on library services and space, collecting staff and director input on library needs, and deciding on whether to remodel the existing building or build a new building.

From there, the library will work with architects and complete a building assessment or a Preliminary Architectural Report (PAR).

Preliminary Architectural Report

In general, having a Preliminary Architectural Report (PAR) has helped immensely. Unfortunately, our experience in facilities management is that a good chunk of money has to be spent in order to really start this process.

The PAR process may involve the following steps:

- Architects analyze feedback from community and staff and use their own knowledge about library design and facilities to create possible designs and locations for a new library. This may be valuable if there is a need to relocate and build a new building.
- Architects can analyze the existing building and create a plan for a major overhaul and remodel. This is valuable if the current location is desirable and the building's square footage works for the library's needs.
- Architects can analyze a specific location and provide a detailed report that will incorporate public and staff input and create a design recommendation for a new building or major remodel of an existing building. The design recommendation includes fairly accurate cost estimates.

Funding your PAR

Funding may be available to assist the library with preparing a PAR, such as the Montana Community Development Block Grant (CDBG) Rehabilitation Program. Per the requirements of this program, a PAR must:

- be prepared by a professional architect licensed to practice in the State of Montana;
- adequately describe existing building conditions (if applicable to the proposed project) and problems and propose a specific course of action for solving the identified problems or meet other identified needs;
- provide sufficient information to adequately assess the need for, feasibility, and general, estimated cost of the proposed project; and
- thoroughly address all of the other issues identified in the PAR outline.

The architect should use their professional judgment to present sufficient information during preparation of the PAR, taking into account that different projects require varying levels of detail

(rehabilitation of an existing building versus construction of a new building) and consideration of the specific course of action for solving the identified problems or meeting identified needs.

The architect should provide appropriate documentation, wherever possible, to support the analysis of the condition of the property and the final proposal submitted.

The public should be involved in the selection of the specific course of action for solving the identified problems or needs, especially representatives or members of any groups that are expected to be the principal users of the proposed structure or facility.

For more information about the Community Development Block Grant offered through the Montana Department of Commerce, please visit [the Department of Commerce website](#).

Renovation vs. New Construction

Things to Consider:

- **Location.** Are you happy with your location, or do you think that you could serve your community better at a different location? If you need to move to a different location, what additional costs might that entail? Would it cost more to repair or renovate the existing building, or to start over? Would an intra/interagency land swap be possible?
- **Environmental and health concerns.** In some circumstances you may have no choice but to mitigate health concerns in older buildings.

The roof leaked so that it looked like waterfalls on the library walls, which led to mold. The floor was caving in, and asbestos in the basement needed removal. Pretty much anything that could go wrong was going wrong with the old building.

The Montana Department of Environmental Quality provides funding through the [Brownfield Program](#) which may be available to eligible libraries. The Brownfields Program provides assessment, planning, and cleanup assistance at properties such as former gas stations, vacant historic buildings, and former commercial/industrial sites.

- **Budget and fundraising capacity.** What is your budget goal for this project? Are you willing and able to seek a bond to fund a building project? Will you work with library support groups? Would you consider taking out a loan?

Our plan for the library changed many times until a local church donated some new land. It was decided that the most cost-effective and realistic route was to purchase a modular and renovate it. There were many roadblocks and times that we would receive setbacks. The total cost of the project was almost \$400,000. The majority of the funding came from a letter campaign that was sent to all of the high school alumni.

Our goal was to complete a large-scale renovation project without the need to go out for a bond. Our Foundation was on board with this after we were given an estimate of \$2 million. The project cost closer to \$2.5 million (COVID cost increases were a big part of this), so we took out an INTERCAP loan to make up

the difference while our Foundation continues to raise money to pay it off. They were able to raise close to the \$2 million within 3 years.

For information about INTERCAP loans for government entities, please visit [the Montana Investment Intercap webpage](#).

Cost Estimates for Planning and Project Management

- Needs assessment only (collecting public input): around \$20,000. This can also be done in-house with experienced staff and capacity.
- Preliminary Architecture Report: typically ranging from \$50,000 - \$100,000 depending on what is requested. Funding may be available.
- Cost of a major design (determined after the PAR): 10 to 15 percent of overall project.
- If project management is handled in-house, it may reduce the overall cost of the project. However, expect the project to take longer. It's very difficult to simultaneously manage a library and a major facilities project.
- Fundraising consultant – cost varies. This person can create a strategy for you and can assist with some of the fundraising work but not all of the work.

There was no general contractor. Decisions relied on me and the staff to decide the next part of the process. Please, please, please do not do this! The stress was insurmountable, and we did have some hiccups, like the state inspector saying we did not have all our permits. We, of course, then got those permits, but our renovations were halted, and more funds were needed.

Working with Architects

- The preliminary architecture report process can be what the library needs – an assessment of the work needed and a design document.
- Architects can help you synthesize various public and library staff comments and can turn that information into a design process.
- Architects can give you a sense of what different parts of the project might cost.
- They can manage the process and help you figure out next steps.
- Architects can give you drawings and language that can help you find funding and explain why the library needs a new building or a major remodel.
- Architects can provide support information and often are aware of grant opportunities that may be helpful throughout the process.

Questions to Consider

- Is there any desire to remain in the current location?
- What locations have been proposed? Is there any interest in pursuing one of them? What is the hold-up with the proposed options?
- Would the county planner help the library with this process?
- Should you include a county commissioner or other county officials on a steering committee?
- Is the “good prospect” site a Brownfields site? There is funding to help with a PAR.
- Does the board want to hire an architectural firm?
- Is speed or saving money more important? If speed is important, consider hiring a project manager.
- Does your current building layout support your staff's needs?
- What needs to change to help your library prepare for emerging and future needs?

Our inside book drop... what a huge difference for our staff when there is bad weather.

Our coffee shop was a controversial addition, but it is gaining a following and it's a big amenity for the staff.

Public Relations

Make sure that the public can easily find information about your project and that they know who to contact with questions. Of course, any decisions involving public resources must be made in an open meeting. The more consequential the decision, the more notice your board should provide to the public to ensure that they have adequate time to understand what decisions are being made and how they can participate or offer public comment.

Public engagement is really important. The city recognized that and made sure the Requests for Qualifications (RFQ) for the consultants/architects were clear and included number of public meetings/open houses, public survey, and work with a steering committee. The architects facilitated the meetings and provided input on the survey. The architects also helped make attractive images and materials to promote public engagement. City identified what they wanted to know and how they wanted the process to work.

Time your public events with other things happening in the community to maximize public awareness and participation.

Describing the scope of work and what is expected of the architects is important. Make it clear what needs to be done, the role of the architects, and the role of the library.

Working with your Local Government

MCA 22-1-309 vests the trustees of city or county libraries with exclusive control over the construction or lease of library buildings.

They have the power to acquire, by purchase, devise, lease or otherwise, and to own and hold real and personal property in the name of the city or county or both;

and to sell, exchange or dispose of real or personal property when they determine it is no longer required.

City or county libraries can accept gifts, grants, donations, bequests of property (real and personal) from whatever source to expend or hold.

Trustees of library districts must seek approval from the Board of County Commissioners when accepting donations of land or facilities, but there is no such requirement for city or county library boards. However, the city or county must agree to put the property on its insurance because the library board cannot legally own the property.

An Attorney General opinion [42 Op. Att'y Gen. No. 98 (1988)] held that a city or county commission does not have the authority to override a decision by the library board regarding library property, even if the property is held in the name of the city or county, because the intention of its acquisition was to serve the library.

However, facilities are owned by the board in the NAME of the city or county. This creates complications with property insurance, who maintains the building, and who pays for repairs and

work on the building. While it may be owned in the name of the local government entity, it is the library board that decides what happens with the property.

Because of this authority and lack of funding, cities or counties will often require the library board to pay for:

- Maintenance and repair of the building.
- Property insurance on the building.
- Snow removal
- Custodial services

They may pay for those services out of the general fund, or they may charge you for the services.

Tension or conflict between a local government and a library board can arise when facilities issues need to be addressed. It's a good idea to be proactive in meeting and building a relationship with your local government staff and officials before you need to seek help from them.

If you don't already have a Memorandum of Understanding (MOU) with the city or county outlining responsibilities for the insurance, utilities, and maintenance for the building and library grounds, you might consider asking them to work on an agreement with you.

Different tasks related to library facilities

Your local circumstances may vary, but this list outlines how responsibilities may typically be delegated:

- Oversee day-to-day maintenance of facilities - director
- Approve expenditures from library funds for facilities maintenance and improvements - board
- Create facilities maintenance plan - director, working with board (board approves)
- Have the power to contract for services to maintain and improve the library - board
- Oversee the work of library maintenance contracts - director
- Have the power to acquire, purchase, lease, or otherwise own library property in the name of the city - board
- Have the right to sell, exchange, or dispose of property - board
- Accept gifts, grants, donations, and bequests of property - board
- Insure the property - board
- Hold the title/deed to the property - board in the name of the city and county unless an independent library district
- Raise funds to help fund facilities improvements - library support groups
- Recruit and organize volunteers to help with tasks such as gardening - library support groups

Please see the appendix for a sample MOU. The Montana State Library cannot provide legal guidance. Please contact your legal counsel if you need assistance.

Accessibility

Reading through the Americans with Disabilities Act itself is useful for getting into the mindset of accessibility to public spaces as a basic right. Explain to the public how architectural barriers bar access and how the changes you are making will help reduce these barriers.

We relied heavily on our architects for identifying necessary ADA improvements. We did have a few people come in in the early planning stages to help us identify areas that were inaccessible – specifically by a big, electric wheelchair.

Resources for Creating an ADA Improvement Plan:

- Regional [Centers for Independent Living](#) - they are experts in completing Accessibility Assessments. These are disability-led non-profit organizations that understand the needs and priorities of people with disabilities. There are four regional offices which cover every county in Montana.
- Another resource is your county ADA Coordinator.
- Online resources about making buildings more accessible:
- [Design for Accessibility: A Cultural Administrator's Handbook | National Endowment for the Arts](#)
- [Creating Accessibility in Libraries | Library Journal](#)
- [ADA Standards for Accessible Design](#)

Accessibility Funding Resources:

- [Montana Main Street Program | Montana Department of Commerce](#)
- [Transportation Alternatives Program | Montana Department of Transportation \(MDT\)](#)
- [Montana Community Foundation | All About Montana's Future.](#)
- [MontTECH](#)

Historic Preservation

I highly recommend hiring an architect who has experience with historic buildings - they should know what requirements and stipulations are typical.

If your library is on the National Historic Register, changes will comply with the regulations. The Register appears to care mainly about the building's exterior appearance.

Your city or county may have its own ordinances pertaining to altering historic buildings. This may include dealing with some kind of historical preservation board.

The public may have strong feelings and attachments to the building and its fixtures. It's a good idea to provide clear and consistent communication to the public when undergoing renovations on a historic building.

There is a lot of sentiment for the building's history even if accessibility and location is not ideal. Try not to change things more than is necessary.

Your local government officials may have strong feelings about the building, as well. Many in local government think of and talk about the building as a point of civic pride. They need to be informed ahead of time and given the justification for the changes, especially if the city or county is helping pay for the project. They may also have ideas and experience to share with you before your project gets underway.

Renovations and work on a historic building can be very expensive. Expect to encounter problems you didn't know existed. Problems you knew existed, but thought were minor enough to ignore, will turn out to be a much bigger deal than you thought. Expect that everything will take longer than you or the contractors estimate, and budget high.

Make sure that your Friends and Foundation groups are aware of the project, its purpose, and the general timeline. It's a good idea to prepare them with a list of talking points and your contact information.

Renovation on historic buildings may require extra consideration, so before your project gets underway give yourself additional time to review any requirements, schedule discussions with people like the historic preservation board, and budget for unexpected expenses.

Resources for Funding Work on Historic Buildings

Ask your nearby museums, historical societies, local government, the Montana State Library, Montana State University Extension, local non-profits, schools, churches—anyone who may be or has been working on similar projects - for advice on where to look.

Was your library building originally funded by some local philanthropic group? If they or their descendants are still around, they might be worth talking to. Find out what grants might be available from the Carnegie Foundation if your library qualifies.

Many grants for historic building preservation require strict adherence to the Secretary of the Interior's Standards for the Treatment of Historic Properties.

[This site](#) has some explanations as well as access to the guidelines.

These guidelines can make a project a lot more complicated, especially if the building is being used for a purpose other than originally intended.

An issue specific to our building is our historic windows - I would love to replace them with modern windows that replicate the historic design but provide better insulation/energy efficiency and lower maintenance costs. However, the guidelines specifically state restoration over replacement. Apparently, it can be done, but it takes an extensive inspection and report from a professional to explain why replacing is a better solution.

Resources:

[Foundation for Montana History](#)

[Montana State Historic Preservation Office](#)

Solar Panels

Several libraries in Montana have been able to take advantage of grants or donations to install solar panels, which reduces electricity costs. Here is one library's story:

Members of a local nonprofit approached the library to include solar panels on the building as part of a grant with NorthWestern Energy. I asked them to go over the idea at a library board meeting to gain their approval first.

Before proceeding with the project we spoke to our local preservation board, who advised against adding panels on the oldest section of the library (the Carnegie section).

Working as a committee with the two members of the nonprofit, we sent out a Request for Proposal per the grant requirements. We got three replies and picked the installer who seemed the most interested and knowledgeable.

From there, it was up to the director to arrange the dates for the work and talk to the installer about the finer details, including showing them where the panels were to be installed on the roof. The financial end was handled entirely through the nonprofit and the utility company.

Be sure to walk through the entire project with both the installer and someone with the fire department. Ideally, include the fire department in the planning process as well, at least to look over the initial plans. After the panels have been installed the fire department should inspect the system and see where all the controls are.

If your building is older, ensure that the installation of solar panels doesn't compromise it in any way. The installer themselves should have some expertise in this area, so don't hesitate to ask questions. Ask whether they've considered wind and snow loads. You may know things unique to your building that aren't obvious to them.

The NorthWestern Energy grant paid for all the solar array and installation. The Friends of the Library generously paid to have the part of the roof resingled in tandem with this project because the life expectancy of the solar panels was greater than the life expectancy of the shingles that would live underneath it, meaning when the shingles began to fail, their replacement would be severely complicated by the solar panels mounted atop them. The solution was to replace the shingles first. Proactive!

Resources:

[EBSCO](#) offers a solar panels grant for subscriber libraries.

Landscaping

Some Montana libraries have created distinctive, water-efficient grounds for their libraries by replace the grass lawn with a xeriscaped, or drought-tolerant, garden. Using flowers and plants that are native to Montana and similar climates, they have installed gardens that are both beautiful and low maintenance. If you are interested in making similar improvements to your library's grounds, your local extension agent or garden club may be able to help you get started.

The sprinkler system developed a leak underneath a concrete pad near one of the entrances. The library took this misfortune as an opportunity to xeriscape the grounds using plants native to Montana, which, in addition to being more beautiful and environmentally conscientious, would also save money on irrigating and tending a lawn.

We contacted the local Extension office staff in charge of the Master Gardener program in our county. They helped us organize volunteers to dig up the existing lawn, plan a layout, and pick out native plants for the new garden.

The criteria for the volunteer group specified that the library was seeking a low-budget, naturalistic layout using only plant plants native to the area. This project has taken a couple of years to fully get underway. First the group removed what was left of the lawn. The next year they planted perennials on the main part of the grounds. This year they will work on the boulevards and add native landscaping rocks throughout.

Volunteers will appreciate having a clear, concrete plan to follow. Your Extension Agent may be able to help you formulate a timeline and plan that suits your group's needs and budget.

Transforming your lawn to a native plant garden may take a long time while the plants are establishing themselves. If your project will unfold over the course of several months or even years, it's a good idea to regularly inform the public about why this transformation is taking place and what outcomes they should expect to see at the end of the project.

Resources:

[Find your local extension agent](#)

General Advice from Library Directors

Don't let one bad experience with a contractor color your future experiences. A relationship may be worth enduring one subpar experience.

My best advice is to keep plodding. You may not be able to move forward; you may have to move in a different direction, but you will get there. It will take longer than they say. It will cost more than they say. Find ways to keep your sanity. Find a way to work through your stress. Know that you are not alone. Many of us are stuck in similar situations. Please feel free to reach out if you need help. You've got this!

Appendix

Safety Checklist

(created by the Midhudson Library System)

1. A regular schedule for changing Air Conditioner/Furnace filters has been established per manufacturer's recommendation. _____ Completed _____ In Progress _____ Not planned
2. A regular schedule and/or a preventive maintenance contract has been established for the air conditioner. _____ Completed _____ In Progress _____ Not planned
3. A preventive maintenance and/or repair contract has been established for any automatic doors. _____ Completed _____ In Progress _____ Not planned
4. Per local codes, boiler maintenance and repair are scheduled. _____ Completed _____ In Progress _____ Not planned
5. Where appropriate and necessary to avoid injury, chair mats are purchased. _____ Completed _____ In Progress _____ Not planned
6. Electrical outlets in public spaces, especially Children's Services, are child-proofed. _____ Completed _____ In Progress _____ Not planned
7. A schedule is developed to replace batteries in clocks. _____ Completed _____ In Progress _____ Not planned
8. Cords on window coverings, especially in public areas, are safely attached to avoid accidents. _____ Completed _____ In Progress _____ Not planned
9. Domestic Hot Water is inspected when necessary and advance financial plans are in place to replace water heater when appropriate. _____ Completed _____ In Progress _____ Not planned
10. A regular schedule of maintenance is determined for drinking fountains to address functional issues such as chemical build-up. _____ Completed _____ In Progress _____ Not planned
11. Elevators and other lifting devices are inspected regularly, per local code, and a preventive maintenance contract is established. _____ Completed _____ In Progress _____ Not planned
12. Fire Extinguishers are placed per local fire codes and a regular inspection schedule is established to insure proper operation. _____ Completed _____ In Progress _____ Not planned

13. A regular schedule is established to maintain the floor covering (carpets, tile, wood, etc.).
_____ Completed _____ In Progress _____ Not planned

14. Equipment and supplies are on hand to remove graffiti. Materials and techniques may differ for different surfaces. _____ Completed _____ In Progress _____ Not planned

15. A regular schedule of inspection and preventive maintenance is established for the building heating system. _____ Completed _____ In Progress _____ Not planned

16. A regular schedule and preventive maintenance is established for humidifying or dehumidifying systems. _____ Completed _____ In Progress _____ Not planned

17. Replacement bulbs and any equipment necessary to replace light bulbs is on-hand.
_____ Completed _____ In Progress _____ Not planned

18. Replacement bulbs and any equipment necessary to replace outdoor lighting is either on-hand or the source is established. _____ Completed _____ In Progress _____ Not planned

19. Contracts for regular maintenance and/or materials and equipment are established for maintenance of library grounds, including lawn, flowers, shrubs, trees, flag poles, etc.
_____ Completed _____ In Progress _____ Not planned

20. Contracts and/or equipment and materials are established to maintain library parking.
_____ Completed _____ In Progress _____ Not planned

21. Maintenance of exterior signage is planned. _____ Completed _____ In Progress
_____ Not planned

22. A plan for painting of parking lot stripes is established. _____ Completed _____ In Progress
_____ Not planned

23. Materials and equipment is on-hand or contracted for maintenance of restroom fixtures, including seals, valves, etc. _____ Completed _____ In Progress _____ Not planned

24. Procedures are established to repair, replace or add interior signage as necessary.
_____ Completed _____ In Progress _____ Not planned

25. A regular plan to inspect, clean and maintain smoke alarms and carbon monoxide detectors is established. _____ Completed _____ In Progress _____ Not planned

26. Materials and procedures for snow and ice removal are established including days and hours when the library is not open to the public, based upon local codes. _____ Completed
_____ In Progress _____ Not planned

27. A plan for regular maintenance of interior and exterior trash receptacles is established.
_____ Completed _____ In Progress _____ Not planned
28. A regular schedule of inspection and maintenance is established for the ventilation system.
_____ Completed _____ In Progress _____ Not planned
29. Vendors and sources are established for repair and/or replacement of windows.
_____ Completed _____ In Progress _____ Not planned
30. Wall shelving is secured. _____ Completed _____ In Progress _____ Not planned
31. A regular schedule of termite and other pests inspection and treatment is established.
_____ Completed _____ In Progress _____ Not planned
32. A regular schedule of roof, mortar and foundation by a professional is established.
_____ Completed _____ In Progress _____ Not planned
33. A regular cleaning maintenance schedule is established.
_____ Completed _____ In Progress _____ Not planned
34. All staff is trained to be aware of misplaced rugs and trip hazards in staff and public areas.
_____ Completed _____ In Progress _____ Not planned
35. Emergency and exit lighting is in place and a regular schedule of inspection is established to insure proper operation. _____ Completed _____ In Progress _____ Not planned
36. The library is compliant with all electrical codes as determined by a professional electrician.
_____ Completed _____ In Progress _____ Not planned

Sample Memorandum of Understanding Agreement

This agreement between the _____ **Public Library**, hereinafter referred to as Library, and _____ **County**, herein referred to as County, shall become effective as of [date of last approval in minutes either by local govt or Library]

Facilities

The County will provide its building at [address]. The Library will conduct business in accordance with all applicable Montana Code Annotated, Administrative Rules of Montana, and Library policies and procedures. Library policies and procedures are available for public review at the Library. The buildings are to be used as a library without rental charge. The following shall be budgeted for and paid for through the funds held by the County in designated Library accounts: electricity; telephone; internet; water; sewer; garbage; building, liability, and property insurance; and building maintenance.

Building Maintenance

The County will maintain the Library facilities and its fixed structures (water/sewer systems, etc) including HVAC. The County will also maintain the grounds and provide snow removal. In the event of negligence, the Library will reimburse the County such costs as may be incurred. The Library will be responsible for cleaning, furnishings, shelving, carpet, and/or other such interior improvements. Either the Library Board of Trustees (or its designative representative) or the County may propose desired capital improvements to the buildings and grounds. Appropriate allocation of the costs of such capital improvements shall be negotiated between the Library and the County. When the Library has made a request that is supported by data and background information, the County Board of Commissioners shall move to review and make a decision regarding the request within 60 days.

Access to Building

The County and its agents shall have access to the Library facilities to maintain, monitor, repair, and/or replace fixed systems and to allow for library deliveries. The County shall not provide access to others unless specifically directed by the Library Director. Entry and access to the Library facilities without the Library Director's approval during off hours by non-Library and non-County personnel is strictly prohibited.

Duration of this Agreement

This Agreement may be amended by mutual consent accomplished by formal written amendment being signed by the parties. This agreement is binding in perpetuity or until terminated by both parties. It may be terminated with Notice of Termination being made and delivered in writing. Such written Notice of Termination must be delivered between parties at least 365 days prior to actual termination of the Agreement.

[Signatures: Commissioners, Library Board Chair, Attest [usually Clerk & Recorder], Date approved by County Commission, Date approved by Library Board]

Preliminary Architectural Report

Exhibit 10-B

PRELIMINARY ARCHITECTURAL REPORT (PAR) REQUIREMENTS

MONTANA CDBG Rehabilitation Program

A. A PAR MUST:

- be prepared by a professional architect licensed to practice in the State of Montana;
- adequately describe existing building conditions (if applicable to the proposed project) and problems and propose a specific course of action for solving the identified problems or meet other identified needs;
- provide sufficient information to adequately assess the need for, feasibility, and general, estimated cost of the proposed project; and
- thoroughly address all of the other issues identified in this PAR outline.

The PAR outline presented here is by no means all-inclusive. The architect should use his or her professional judgment to present sufficient information during preparation of the PAR, taking into account that different projects require varying levels of detail (rehabilitation of an existing building versus construction of a new building) and consideration of the specific course of action for solving the identified problems or meeting identified needs.

- The architect should provide appropriate documentation, wherever possible, to support the analysis of the condition of the property and the final proposal submitted.
- The public should be involved in the selection of the specific course of action for solving the identified problems or needs, especially representatives or members of any groups that are expected to be the principal users of the proposed structure or facility.
- Architects and project representatives can call staff (406/841-2770) to request clarification and guidance regarding this PAR outline.

B. ENVIRONMENTAL CONSIDERATIONS RELATED TO THE PAR

All Montana state and CDBG funded projects are subject to the Montana Environmental Policy Act (MEPA) and the National Environmental Policy Act of 1969 (NEPA).

Both laws seek to avoid adverse impacts on the environment by mandating careful consideration of the potential impacts of any development assisted with federal funds or approved by a Montana state agency.

- **NEPA** establishes national policy, goals, and procedures for protecting, restoring, and enhancing environmental quality within the United States as a whole;
- **MEPA** seeks to avoid or mitigate adverse impacts on the natural and human environment by mandating careful consideration of the potential impacts of any development assisted with state funds or approved by a Montana state agency;
- Architects and project representatives should consult the Environmental Checklist, Environmental Assessment, and/or Environmental Review Record that has been completed by the sponsoring unit of general local government.
- In order to avoid delays, all applicants to state or federal infrastructure or housing funding programs should consider potential environmental impacts during project planning. As a result, local officials may be able to avoid or mitigate potential environmental impacts through project

design or location decisions by carefully considering potential, adverse environmental consequences of projects and the actions that could be required to mitigate any identified adverse consequences.

- Various funding agencies have different requirements related to the environmental review process, the selection of the preferred alternative, and adoption of the preliminary architectural report. Applicants should contact those agencies that they are considering applying to so that each agency's specific requirements can be met concurrently and avoid any unnecessary delays in project completion.

C. PRELIMINARY ARCHITECTURAL REPORT OUTLINE

- I. PROBLEM AND/OR NEED DEFINITION - DESCRIBE AND DOCUMENT THE PROBLEM(S) TO BE SOLVED OR NEED(S) IDENTIFIED.
 - A. IDENTIFY THE PLANNING AND SERVICE AREA OF THE FACILITY.

Using narrative and drawings, describe the planning and service area. The description should include the following information:

1. **LOCATION** - Indicate legal and natural boundaries, major obstacles, environmental constraints (such as floodplains), etc., using maps, photographs, and sketches of the planning and service area for the structure or facility.
2. **GROWTH AREAS AND PROJECTED POPULATION TRENDS** - Identify specific areas of projected, concentrated population growth and relate these to the forecasted growth in the clientele to be served by the proposed NSP project.

Provide population projections for the project's planning and service area (and for the persons and/or groups the facility will serve) for the projected design period (i.e., the anticipated useful life of the proposed facility).

Base projections for the clientele to be served upon historical records, Census data, or economic projections, citing recognized sources.

- B. EVALUATE THE CONDITION OF THE EXISTING FACILITY OR STRUCTURE (IF APPLICABLE TO THE PROPOSED NSP PROJECT). Describe the existing facility or structure, including at least the following information:
 1. **HISTORY** - Provide a brief history of the facility or structure, including when the unit was constructed, major improvements implemented in the past, and any past problems.
 2. **CONDITION OF FACILITIES** - Describe the present condition and any problems such as code deficiencies, general structural decay, presence of asbestos, mold or moisture, lead based paint, subsidence issues, overcrowding, or handicapped accessibility. Describe the adequacy or capacity of the existing facility(ies) or structure(s) to meet existing and long-term needs.
 3. **HEALTH AND SAFETY** - Describe concerns and deficiencies, compliance issues, and relevant regulations such as the International Building Code, (and other codes as listed in "Special Requirements Concerning Code and Standards Enforcement" in Chapter V of the Application Guidelines), asbestos, lead-based paint, handicapped accessibility, zoning ordinances, and other federal, state, local, or tribal requirements concerning the existing facility.

Attach pertinent correspondence to or from appropriate federal, state, and local regulatory agencies, especially information that provides documentation of health and safety concerns and deficiencies.

FINAL PROPOSAL

- A. DESCRIPTION OF SELECTED SITE
 1. **IF PROPOSING REHABILITATION OF EXISTING BUILDINGS** - Describe existing buildings within the selected site that could be modified or rehabilitated to accommodate the proposed facility or structure. Describe the potential benefits and possible deficiencies with the proposed design, building or site, including code compliance issues, floor space, handicapped accessibility, and potential for long-term expansion, as applicable.
 2. **IF PROPOSING NEW CONSTRUCTION** - If proposing new construction, describe the selected building site for new construction, any existing structures on the site(s), potential for long-term expansion, proximity to other services, environmental constraints, etc.
- B. **REGULATORY COMPLIANCE AND PERMITS.** Describe issues that must be addressed regarding compliance (for either a new building or a rehabilitated building) with appropriate regulations such as the International Building Code and other relevant codes, zoning, asbestos, lead-based paint, special permits, handicapped accessibility (American Disabilities Act and HUD 504 regulations), designated 100-year floodplains, and any other applicable federal, state, local or tribal requirements.
- C. **LAND ACQUISITION ISSUES.** Identify sites to be purchased or leased and any easements needed, if applicable.
- D. **CONSTRUCTION SITE PROBLEMS OR ISSUES.** Discuss potential concerns such as geological constraints, limited access, underground storage tanks, floodplains, high water table, asbestos, lead-based paint, contaminated soil, noise, odors, or other conditions that may affect cost of construction or long-term operation of the (new or rehabilitated) facility or structure.
- E. COST ESTIMATES FOR THE SELECTED SITE.
 1. **PROJECT COSTS** administrative, financial, engineering, architecture, and anticipated construction costs and
 2. **PROJECTED ANNUAL OPERATION AND MAINTENANCE COSTS.** In responding to items 1 and 2 for Housing projects, consult Section C (Financial Analysis, Parts I-VI) of the Uniform Application for Montana Housing Loan, Grant & Tax Credit Programs previously submitted with the NSP application.
 3. **OPERATIONAL REQUIREMENTS.** Discuss the expertise required to operate the facility or structure and any unique operational requirements or benefits of the proposed NSP activity and project.