Wyoming Public Library Directors' Handbook

WYOMING LIBRARIES

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- *New Library Directors Handbook*, Montana State Library, June 2011
- *Handbook for New Public Library Directors in New York State.* Rebekkah Smith Aldrich, Coordinator for Library Growth & Sustainability, Mid-Hudson Library System, Poughkeepsie NY
- *Manual for New Directors of Public Libraries in Utah, 4th ed.* Utah State Library Division, Department Of Heritage And Arts, August 2013
- *Administrative Essentials: A Handbook for Wisconsin Public Library Directors.* Division for Libraries and Technology, Wisconsin Department of Public Instruction. © Copyright 2008, used with permission. pld.dpi.wi.gov/pld_aecontents
- *Kentucky Public Library Trustee Manual.* Kentucky Department for Libraries and Archives, January 2012.
- *ACLB Public Library Trustee Handbook.* Association of Connecticut Library Boards, 2011.

These manuals will be included in the supplementary materials on the *Wyoming Public Library Directors' Manual* website will.state.wy.us/ldo/directors/directors_handbook.html.

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About This Guide

This handbook provides an introduction to working as a Wyoming public library director, including the Wyoming library landscape and the tasks, issues and challenges you may face. Throughout it you will find links and reading lists for more in-depth information on specific topics both within this manual and in the supplementary materials on the website.

We will add information to the website as new issues arise and new information becomes available. We welcome any comments or suggestions you may have on this guide; please contact the Wyoming State Library (WSL) Library Development Office – will.state.wy.us/ldo.

On legal issues, this handbook is only a summary and should not be construed as legal advice. While it offers an introduction to library-related statutes, you should direct any questions to your library's legal counsel.

Wyoming library directors come from a variety of backgrounds, so some of the material in this may be familiar to you. Whether you are from Wyoming or out of state, whether you have extensive leadership experience or are stepping into a directorship for the first time, we hope you will find useful information in these pages.

Additional Resources

Many resources are available to you in addition to this manual. Here are some you may wish to familiarize yourself with:

- Wyoming Libraries Directory – will.state.wy.us/directory/
- *Wyoming Library Laws*, extracted from Wyoming Statute – will.state.wy.us/slpub/LibLaws.pdf
- *Wyoming Public Library Board Members' Handbook* – will.state.wy.us/ldo/boards/handbook.html
- Wyoming Public Library Statistics – will.state.wy.us/statistics/index.html
- Wyoming State Library new library science publications – will.state.wy.us/ldo/newpubs.html or www.pinterest.com/wyolibraries/wsl-library-science-collection/
- Legislative Directory – legisweb.state.wy.us/LSOWEB/LegInfo.aspx
- Wyoming State Statutes and Constitution – legisweb.state.wy.us/LSOWEB/wyStatutes.aspx

This includes annotated and downloadable formats. You should also have *Wyoming Statutes, Annotated* in print format at your library.

- American Library Association – *Intellectual Freedom Manual*
  The 8th edition is available from the Wyoming State Library collection – search wyld.sdp.sirsi.net/client/wsl. Your library may already have a copy of this or a previous edition. The companion website is found at ifmanual.org/.
- SirsiDynix manual – linked from will.state.wy.us/wyld/docs/index.html
  Contact the WYLD Office for access.

Getting Started

What does a library director do? He or she is an administrator and business manager with ultimate responsibility for the successful operation of the library, including creating a cordial and friendly atmosphere in the library, marketing the library and acting as an ambassador to the community. The director plans and carries out library goals and objectives, prepares budgets, supervises employees, arranges for maintenance of the building and grounds, collects statistical data to evaluate the efficiency of the library, and establishes cooperative relationships with the library board and county commission, as well as with other elected officials, community organizations and colleagues in libraries across the state. The director serves as the lead professional librarian with knowledge of library best practices, sets an example for others in the delivery of reference and readers' services, and uses technology to enhance library operations.

The director is charged with accomplishing these tasks while upholding high standards of ethical decision making, as outlined in the Code of Ethics of the American Library Association below.

A healthy library in the 21st century continually looks ahead and pursues opportunities for delivering necessary and relevant services in appealing ways. There are always new fields of knowledge to acquire, new information formats to integrate, new technologies to implement, and new groups of users to attend to.

As you settle into your job, you will grow to appreciate the special opportunity that working in your local public library offers. The public library is a revered institution in towns all across this country, symbolizing the best in American values and culture. The responsibility now rests on your shoulders to ensure that your local library measures up to a long tradition of public trust and public service.

Portions adapted from Montana State Library's "New Library Directors Handbook" and "Manual for New Directors of Public Libraries in Utah, 4th Ed."

Librarian Ethics

Professional librarians uphold the highest ethics of the profession, providing quality service, defending intellectual freedom and patron privacy, respecting intellectual property, treating colleagues with respect, placing public good over personal gain, distinguishing between personal convictions and professional duties, and always striving for excellence. These are outlined in the *Code of Ethics of the American Library Association.*

Code of Ethics of the American Library Association

Read the entire policy statement at *www.ifmanual.org/codeethics*.

The principles of this Code are expressed in broad statements to guide ethical decision making. These statements provide a framework; they cannot and do not dictate conduct to cover particular situations.

I. We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.
II. We uphold the principles of intellectual freedom and resist all efforts to censor library resources.
III. We protect each library user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted.
IV. We respect intellectual property rights and advocate balance between the interests of information users and rights holders.
V. We treat co-workers and other colleagues with respect, fairness, and good faith, and advocate conditions of employment that safeguard the rights and welfare of all employees of our institutions.
VI. We do not advance private interests at the expense of library users, colleagues, or our employing institutions.
VII. We distinguish between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources.
VIII. We strive for excellence in the profession by maintaining and enhancing our own knowledge and skills, by encouraging the professional development of co-workers, and by fostering the aspirations of potential members of the profession.

Adopted at the 1939 Midwinter Meeting by the ALA Council; amended June 30, 1981; June 28, 1995; and January 22, 2008.

You Are Not Alone

The Wyoming State Library is your first resource. State library staff can offer you information, consulting and training to help you as you step into your role. Never hesitate to call or email us if we may be of assistance. You may contact the Wyoming State Librarian or the Library Development Office with general questions:

State Librarian
will.state.wy.us/wsl/contacts.html
307-777-5911

Library Development Office
will.state.wy.us/ldo/

Technical questions about your Sirsi/Dynix integrated library system may be directed to the WYLD support staff at will.state.wy.us/wyld/support.html. They may be reached at 1-800-264-1281 (Press 2), or wyldstaff@will.state.wy.us.

Wyoming State Library
2800 Central Ave
Cheyenne WY 82002
307-777-6330

Directors are encouraged to network with their peers in the other 22 county libraries. You may find contact information in the Wyoming Libraries Directory at will.state.wy.us/directory/. In addition, there are listservs specifically for directors at will.state.wy.us/wyld/email/lists.cfm.

Orientation

You will be invited to the Wyoming State Library to attend an orientation to WSL staff and services. Wyoming libraries are part of a wide range of statewide cooperative projects, and WSL offers many supportive services you should become familiar with, so it is recommended to schedule this soon after taking the helm.

Library Directors Work Session

An annual work session brings together the academic and county library directors. This event usually consists of a workshop on a topic or issue that directors determine important, strategic discussions with the state librarian, time to share successes and problems with colleagues, and an environment to unwind from the rigors of the regular schedule. The dates of the event are announced four to six months ahead so directors can mark their planning calendars and schedule other events around the dates. Attendance is voluntary but most directors attend to be with colleagues for discussions on local and statewide issues.

A planning committee of directors develops the program with input from the other directors. The Wyoming State Library underwrites much of the cost of the retreat with Library Services and Technology Act (LSTA) funds.

Documents to Put Your Fingers on Quickly

Some of these you may have researched prior to your first day or even prior to your job interview. Here's a brief checklist:

- Strategic plan, including vision and mission for the library
- Any additional planning documents such as a technology or facilities plan
- List of board members, officers and committees
- Board bylaws and calendar
- Minutes and director's reports for the last six months
- Current and previous years' budgets
- Recent financial and statistical reports
- Annual reports to the community and to the Wyoming State Library – will.state.wy.us/statistics
- Policies and procedures manual (collection development policy, internet policy, etc.)
- Organizational chart
- List of staff members, including job titles and position descriptions
- List of board members, officers and key contacts for your library foundation and any friends of the library group(s)
- List of local government officials
- List of state elected officials – legisweb.state.wy.us/LSOWEB/LegInfo.aspx and sites.google.com/a/wyo.gov/state-of-wyoming/agencies
- *Wyoming Library Laws* – will.state.wy.us/slpub/LibLaws.pdf
- Documents pertaining to the history of the library
- Documents pertaining to a new building project (if applicable)
- Any brochures or other public relations materials currently being used to promote the library
- Any passwords you may need for computer access
- Any critical building knowledge, such as disaster plans and emergency shutoffs
- List of frequently used library jargon and acronyms (see appendices)

Now that you have all the paperwork in hand, in your first month you may want to:

- 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.
- Create a calendar with important dates, such as contract dates, insurance expiration dates, dates of local significance and deadlines.
- Contact local government personnel.
- Sign up for some of the Wyoming library listservs at will.state.wy.us/wyld/email/ and www.wyla.org/wla-email-lists, particularly the "all@" lists.

Pages 6-12 of the *Handbook for New Public Library Directors in New York State* has a more extensive suggested list, although not all items on it will be applicable to Wyoming. Find it at will.state.wy.us/ldo/directors/Directors_HandbookNY.pdf.

Section adapted from the Wyoming Public Library Board Members' Handbook and the Manual for New Directors of Public Libraries in Utah, 4th Ed., August 2013

Getting to Know Your Board

The most important working relationship you will develop is the one with your board of trustees. It is critical to differentiate your roles: the general role is that the board governs the library while the director administers it.

While your tasks will include working with the board on planning and policies, ultimately it is their responsibility to set the direction for the library. Conversely, the board should not attempt to micromanage the day to day processes, nor should they intervene in normal personnel matters.

Below is a brief summary of the division of duties between director and board.

LIBRARY DIRECTOR	**LIBRARY BOARD**
Manage the day to day operations of the library.	Responsible for the governance of the library, not the day to day operations.
Recruit, hire, evaluate and, if necessary, fire library staff.	Recruit, hire, evaluate and, if necessary, fire the director. Board does not handle personnel issues for any other employees.
Let the board know what you need from them in order to be effective.	Provide frequent, substantive, constructive feedback to the director.
Implement policies. Make policy recommendations to the board.	Adopt policies. Review policies on a regular basis.
Ensure board follows adopted bylaws	Adopt bylaws for board operation
Provide information needed by the board. Implement the strategic plan. Report progress.	Develop strategic plan for overall direction of the library. Evaluate progress.
Prepare and submit to the library board a budget request based on present and anticipated needs. Assist in revisions.	Examine the budget prepared by the director and revise as needed. Officially adopt the budget and present it to county commissioners.
Advocate for sufficient funding for library personnel, programs, services, technology and facilities.	Secure sufficient funding for library personnel, programs, services, technology and facilities.
Manage approved budget through the expenditure of funds not to exceed the bottom line. Maintain complete and accurate records of finances	Review expenditures in accordance with the budget, not to exceed the bottom line.
Attend county commission meetings as appropriate. Provide the board with any information needed for presentations.	Attend county commission meetings as appropriate.

Other tasks both board and director will share. Both should:

- Attend board meetings
- Communicate openly and honestly with each other on a regular basis
- Collaborate on the strategic planning process
- Regularly evaluate community needs
- Advocate for the library
- Network with state and local politicians and community groups
- Attend county commission and city council meetings as appropriate
- Work cooperatively with the library foundation and any friends group(s)
- Participate in continuing education and training opportunities and in professional organizations
- Be familiar with the library's bylaws as well as state and federal laws affecting the library

Additional tables showing the roles and responsibilities of the director and board by specific topic may be found in the appendices.

Board/Director Relationship Resources

- You can find a brief video on this topic, "Trustee Trouble 4: Board/Director Relationships," at www.wyominglibraries.org/trusteetrouble.html.
- The Washington Library Trustee Wiki has a good list of what library boards do and what they should not do in their overview at wiki.sos.wa.gov/trustees/library-trustees-overview.ashx.
- The chart of differing roles was adapted from *Maryland Library Trustee's Manual, 2009.* It may be found in the supplementary materials for the *Wyoming Public Libraries Board Members' Handbook* at will.state.wy.us/ldo/boards/handbook.html.
- A longer discussion of the board/director relationship may be found in chapter 3 of the *Training Resource Kit for Pennsylvania Public Library Trustees*. See: will.state.wy.us/ldo/boards/handbook.html.

Getting to Know Your Staff

A high priority should be getting acquainted with staff. The Montana State Library's *New Library Directors Handbook has these* suggestions for your first few days:

- Get to know your staff and reassure them. Do you remember what it was like to have a new boss? Your staff feels much the same way as you might have. Try to remain neutral and avoid any negative comments about the way things were done in the past. It's also a good idea to not become involved in staff disputes.
- Tour the building with staff and schedule time to work with them. It will give you a good feel for how things are done.
- 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.

You will find a lengthier discussion on personnel matters later in this handbook.

Getting Started Reading List

The Wyoming State Library maintains a collection of books for professional librarians that cover all aspects of library management. Reading lists on specific topics are provided throughout this manual. These titles are held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog at wyld.sdp.sirsi.net/client/wsl.

- **What every library director should know**. Susan Carol Curzon. Lanham, Maryland : Rowman & Littlefield, [2014].
- **Library management 101 : a practical guide**. Edited by Diane L. Velasquez. Chicago : ALA Editions, an imprint of the American Library Association, 2013.
- **Library and information center management**. Barbara B. Moran, Robert D. Stueart, and Claudia J. Morner. Santa Barbara, California : Libraries Unlimited, [2013].
- **Crash course in public library administration**. Wayne Disher. Santa Barbara, Calif. : Libraries Unlimited, c2010.

For questions about the WSL professional collection, please contact the Library Development Office.

The Wyoming Library Landscape

In 1886 the Wyoming Territorial Legislature passed the first legislation in the nation enabling county-based library systems. Laramie County Library System was the first Wyoming county library to be formed under this legislation. This law led to the state's current system of 23 county library systems, ensuring that every resident of Wyoming has free access to library services.

Wyoming's public libraries, 7 community college libraries and the University of Wyoming libraries have a history of working collaboratively to serve the state's residents. Because of this cooperation, Wyomingites in even the tiniest communities have access to a vast array of library resources through the WYLD system. The Wyoming Library Community also includes more than 200 school libraries and numerous special libraries.

Wyoming does not have certification of libraries or librarians, nor does it offer direct state aid. State and federal dollars managed by the Wyoming State Library are typically put to work on statewide projects that benefit all libraries, such as the shared Sirsi/Dynix Integrated Library System (ILS) and licensed GoWYLD databases.

The state library provides support to the Wyoming Library Community, and acts in a leadership role. However, its relationship to your library is that of a colleague; it does not have authority or governance over county libraries.

The Wyoming Library Association is the statewide professional organization open to staff, board members and others involved with all types of libraries. Their website is at www.wyla.org/.

The state library maintains an online directory at will.state.wy.us/directory/ that lists all public and academic libraries, and most school and special libraries. The directory provides contact information for libraries and key library employees.

Wyoming Public Library Governance

Wyoming Statute Title 18, Chapter 7 addresses the establishment and governance of county libraries. The full text may be found in *Wyoming Library Laws* at will.state.wy.us/slpub/LibLaws.pdf.

Board of trustee duties spelled out under that statute include:

- "Control, use and disposition of the county library fund," budgeting and expending it "for the maintenance, operation and promotion of the county library and county library

system in order to carry out the informational, educational, cultural and recreational role of the county library." (18-7-103)

- "Receive and be responsible for real estate, money or other property to aid the establishment, maintenance or operation of the county library system." (18-7-104)
- "Appoint a competent librarian who with the approval of the board of directors shall appoint a library staff. The duties and compensation of the staff shall be determined by the board." (18-7-104)
- "Prescribe rules and regulations for the establishment, organization, operation and use of the county library and library system." (18-7-105)

Additional roles not spelled out in statute include monitoring the library's effectiveness, engaging in strategic planning and advocating for the library.

County government has primary responsibility for funding the library. Statewide, about 95% of Wyoming public libraries' operating revenues come from county sources. Direct state and federal dollars provide only a tiny amount. Income from private fundraising and endowments varies by library.

The county commission appoints from three to five library board members who serve without compensation and who may be removed by the commissioners for misconduct or neglect of duty. Each library board selects its own officers. Board members may serve two consecutive three-year terms before having to step off the board for at least two years.

It is vital that the board and director understand and keep to their respective roles. The director should defer to the board on governance issues, and the board should refrain from micromanaging the library. Although developed primarily for trustees, the "Trustee Trouble" video series (www.wyominglibraries.org/trusteetrouble.html) offers concrete examples that may helpful to you.

Wyoming State Library

will.state.wy.us

Know that you are not alone: Wyoming State Library staff are always glad to help you with your questions or concerns, whether it be technical help from our WYLD office, a reference question or a consulting request. Call 307-777-6333 or the toll-free (in Wyoming) number at 800-264-1281. Individual contacts may be found at will.state.wy.us/wsl/contacts.html.

The Wyoming State Library was created in 1871 as the special library for state government. Its duties defined by statute include:

- Managing federal funds from the Library Services and Technology Act (LSTA) program and any sub-grants to individual libraries (W.S. 9-2-1026.5) will.state.wy.us/admin/lsta.html
- Serving as the state documents depository (W.S. 9-2-1026.6) will.state.wy.us/sis/wydocs
- Responsibility for library development throughout the state, helping libraries expand their services (W.S. 9-2-1026.6)

In its role as the agency responsible for library development, the Wyoming State Library provides a number of services to your library that are outlined here.

LSTA in Wyoming

Library Services and Technology Act (LSTA) federal funds are made available annually to the Wyoming State Library through the Institute of Museum and Library Services (IMLS). A strategic plan identifies the types of projects that will be offered to benefit library employees, libraries and Wyoming residents. Employee continuing education, resource sharing, interlibrary cooperation, digital collections and centralized purchasing services for materials and supplies are ongoing priorities. Learn more about LSTA at will.state.wy.us/admin/lsta.html.

Resource Sharing:

Cooperation among Wyoming libraries allows your library access to a world of resources beyond the building's walls, both in terms of materials held by other libraries and shared electronic resources. The state library provides leadership to promote resource sharing among Wyoming libraries. Its LSTA strategic plan (will.state.wy.us/admin/lsta.html) outlines its strategy and tasks. These include:

- Technical and administrative support for statewide interlibrary loan
- Licensing shared databases for GoWYLD.net
- Digitization initiatives that create Wyoming-specific electronic resources found on the Wyoming State Library Digital Collections portal at digitalcollections.wyo.gov/

When statewide projects are developed, public libraries are involved in the decision-making process because the county library director has the formal role for making commitments, meeting cost sharing requirements and determining the level of involvement for the library.

WYLD Office

This Wyoming State Library office provides technical and administrative management of the WYLDCat system and GoWYLD electronic resources. (will.state.wy.us/wyld/support.html) You'll find more information on WYLD in the next section of this handbook.

Library Development Office (LDO)

The WSL Library Development Office (LDO) provides continuing education, data services and consulting on a wide variety of topics. LDO staff contacts and projects may be found at will.state.wy.us/ldo/index.html.

Continuing Education

The State Library puts you in touch with numerous training opportunities so that you may expand your knowledge of library topics. These include:

- **Live webinars** – interactive learning from your computer. Find sessions sponsored by the Wyoming State Library or others on the training calendar www.wyominglibraries.org/calendar.html.
- **Video archive** – past webinars and other training videos may be found on the state library's YouTube channel at www.youtube.com/user/wyomingstatelibrary or at will.state.wy.us/ldo/webinararchive.html.
- **Live training** – the state library often sponsors training at the Wyoming Library Association (WLA) conference (conference.wyla.org) or in conjunction with the WLA Legislative Reception, held in Cheyenne during the legislative session.
- **Training on demand** – if your library has a specific topic it would like training on, the state library can set up a webinar to work with your board or staff.

Training opportunities are announced on the all@will.state.wy.us listserv and through the Wyoming State Library Training Calendar at www.wyominglibraries.org/calendar.html.

Library Science Collection

The state library purchases books on everything from children's storytime to planning a building project. These are available to you through interlibrary loan. For the latest additions, and more information, see will.state.wy.us/ldo/newpubs.html. To find materials on any given topic, or to suggest an item for purchase contact the Library Development Office. In addition, the GoWYLD.net databases include numerous library science periodicals as well as Library, Information Science & Technology Abstracts (LISTA).

Library and Community Data

Good data can help you evaluate your library, advocate for it and plan for the future. The WSL Library Development Office collects and publishes statistics on Wyoming public libraries, organizes links to other state and national data sources, and offers assistance with finding and using data. A full description of data services may be found in the appendices.

All these state level surveys are requested from all 23 county library systems. Except for the salary survey, these may be found at will.state.wy.us/statistics:

- **Annual report**: Required by Wyoming Statute, this collects information on budgets, collections, visits, circulation and other basic measures. Data from all 50 states are reported to the Institute of Museum and Library Services (IMLS), which compiles and publishes it, and provides analysis and data tools: www.imls.gov/research/.
- **Budget survey**: After library budgets are approved for the fiscal year, the state library requests current and prior year approved budget figures, mills (where applicable) and comments.
- **Salary survey**: Conducted every two years, this covers educational requirements and salaries/wages for library positions from director to library page. Because detailed wage data can be personally identifiable, the state library only releases the full data to library directors and boards.
- **Benefits survey:** Every four years the state library collects information on what benefit packages are offered to library employees.

From time to time, the Wyoming State Library will work with researchers to promote national data collection efforts. Your participation in these projects provides valuable information. School and community college data are also available on the WSL website. For assistance with library data, contact the Library Development Office.

Wyoming Talking Books

The Talking Books Program provides free library services to Wyoming residents who are unable to read regular print material due to visual, physical or reading disabilities – whether permanent or temporary. It is estimated that more than 18,000 people who live in Wyoming qualify for the program. Qualified patrons include Wyomingites of all ages who are legally blind, cannot see well enough to read regular print comfortably regardless of corrective eyewear, have physical limitations that prevent them from holding books or turning pages, or have reading disabilities due to an organic dysfunction, such as dyslexia, autism or traumatic brain injury. Learn more at www.wyomingtalkingbooks.org/.

Central Acquisitions Office (CACQ)

Many libraries save money and time purchasing materials and supplies through the state library, which can manage invoicing, track funds and obtain bulk purchaser discounts (will.state.wy.us/acq). Libraries using Central Acquisitions (CACQ) deposit funds with the Wyoming State Library, and the office places orders using these deposited funds.

Discounts

Because of the volume the Wyoming State Library does with some vendors, the vendors offer anywhere from 10% to 15% higher discounts than to libraries ordering individually. Discounts are not guaranteed with all vendors because not all offer them. However, the office will try to get the best deal available.

Ordering

When ordering through the Central Acquisitions Office, libraries should have sufficient funds in their account to cover the order. All orders that are processed through CACQ are shipped directly to the library. This program does not promote one vendor over another, but staff will try to answer questions about vendor products and services.

CACQ provides three different ordering options:

1. Libraries can mail, fax, email or phone the office. Order forms are supplied by CACQ. If libraries need their own materials ordered from a specific vendor, provide that vendor's name. If a vendor is not specified, CACQ will order from the supplier whom they feel will give the best deal. If a vendor is specified, CACQ will order direct.
2. Libraries can order direct from a vendor and have them invoice the Wyoming State Library Acquisitions Office. If CACQ does receive a discount from that vendor, libraries should receive the same discount.
3. Libraries can purchase locally or from a salesperson. Libraries can send CACQ the invoice to be paid for from their funds. Libraries can order what they want from the vendor they want.

Problem Resolution

CACQ can handle problems that arise with vendors including billing inquiries and facilitating the return of materials or damaged shipments.

Fund Accounts

The CACQ Office provides libraries with as many fund accounts as necessary. Libraries are provided with a monthly report that shows their current balance. CACQ also provides a report that gives libraries a detailed account of their fund activities.

Interest Earned

Each acquisitions account earns interest based on the level of service provided and their monthly balance. The director should check with staff on current interest rates.

E-Rate Program

E-rate is common lingo for the Schools and Libraries Program of the Universal Service Administrative Company (USAC) under the authority of the Federal Communications Commission (FCC). It can provide fiscal support to schools and libraries for eligible products and services that augment affordable telecommunications and Internet access.

Participation in this federal program is optional but it can save you money. On the E-rate for Wyoming libraries front, only the 23 county library systems and the state library are eligible. At this time, only a handful of Wyoming libraries participate annually. Through a series of forms submitted online, directors or their designees announce their telecom and Internet access needs, select their provider(s) for the next funding year and, after using the school lunch data for the school districts in their service areas, seek reimbursements or discounts for these services through USAC and/or their service providers. Discounts range from 20% to 90% of the costs of eligible services, depending on the level of poverty and the urban/rural status of the population served.

The chief reason why only a small set of Wyoming libraries use it is the requirements of the Children's Internet Protection Act (CIPA), www.usac.org/sl/applicants/step06/cipa.aspx. If a library is just seeking E-rate support for the local, long-distance and cellular phone services, there is little need for CIPA compliance. A second deterrent is the technology plan requirement for many of those seeking Internet access support; this must be updated every three years. Finally, there is the burden of doing the forms on an annual basis.

The state library provides expertise and support with a state E-rate coordinator for Wyoming libraries. Contact the WYLD Office for assistance. The most complete, current, and official E-rate information is on the web at www.usac.org/sl/about/getting-started/default.aspx.

State and Federal Documents

The Wyoming State Library administers the State Document Depository program, gathering physical and electronic documents from state agencies. In addition, the Wyoming State Library is one of nine selective Federal Depository Libraries in Wyoming. As a director, you should know the following about WSL's government documents programs:

- It is a circulating collection, so your patrons may request items through interlibrary loan if they are not available electronically.
- The state library offers reference services for locating government information. Contact refdesk@wyo.gov or 307-777-6333. Government information is also available through GoWYLD at gowyld.net/subj.cfm?subject=Govdocs.
- If your library intends to discard any state documents, please contact the state library first before you get rid of them, in case they can be added to the WSL collection.
- Wyoming Federal Depository Consortium members will be trained on meeting discard procedures set forth by the Government Printing Office.

Federal Documents Depository information: will.state.wy.us/sis/wyfdlc
State Documents Depository information: will.state.wy.us/sis/wydocs

Questions about state and federal documents may be directed to the appropriate Wyoming State Library staff member: will.state.wy.us/wsl/contacts.html.

County libraries are generally not on any distribution list for these official publications but may receive a wide range of state government materials including proposed rules changes, draft environmental impact statements, consumer brochures and announcements for community programs. Displaying these materials is encouraged. The public is often invited to review or inspect these documents at the library.

Local Government Documents

County and city agencies may provide the library with copies of planning documents, ordinances, environmental statements or handbooks. Each county library is responsible for deciding if it will actively collect, catalog and maintain them as resources for residents and other researchers.

Publications

State library staff create electronic and print materials on topics concerning Wyoming libraries. Many may be accessed from the publications page at will.state.wy.us/slpub. Some that may be of interest to you:

- *Wyoming Library Laws* – laws pertaining to libraries extracted from the most recent statutes: will.state.wy.us/slpub/LibLaws.pdf.
- *Wyoming Libraries Directory* – searchable online directory for key staff in public, academic, school and special libraries: will.state.wy.us/directory/.
- *Wyoming Library Roundup* – a free magazine produced in partnership with the Wyoming Library Association. It features articles, interviews and book reviews focused on different topics each issue. Your library will receive one or more copies by mail: will.state.wy.us/roundup.
- *News to Use* – An irregular electronic newsletter that covers a wide range of topics that library board members can use in their roles as policymakers and advocates. NTU is delivered electronically to you to distribute to your board: will.state.wy.us/slpub/boards.
- *Wyoming Library Foundations* – directed to library foundation board members: will.state.wy.us/slpub/foundations. As with *News to Use,* it will be sent to you to distribute to your foundation board.
- *Wyoming Public Library Board Members' Handbook* – designed to guide your trustees through their role, responsibilities and resources available to them: will.state.wy.us/ldo/boards/handbook.html.

Additional news and updates from the Wyoming State Library may be found on:

- The *Outrider* blog – www.wyominglibraries.org
- Twitter – twitter.com/WyoLibraries
- Facebook – www.facebook.com/wyominglibraries
- Pinterest – pinterest.com/wyolibraries
- The all@will.state.wy.us listserv. Sign up at will.state.wy.us/wyld/email/lists.cfm or contact the state library to be added to the list.

Wyoming Center for the Book

As an affiliate of the Library of Congress Center for the Book, the Center conducts projects that call attention to the importance of books, reading, literacy and libraries.

WYLD

will.state.wy.us/wyld

WYLD stands for the Wyoming Libraries Database, originally the consortium of libraries that are participating members in the WYLDCat catalog. It has come to represent more: the joint catalog, resource sharing, professional development, and statewide licensing and purchasing of electronic resources (GoWYLD.net), to name a few.

The acronym WYLD originally stood for the Wyoming Libraries Database. The online link to this project is will.state.wy.us/wyld/. For more than two decades WYLD represented the bibliographic database that public and college libraries jointly created, but WYLD now represents a much larger concept.

Today WYLD reflects the whole of all the networked library projects: statewide licensed databases, the public access catalog, staff subsystems used for circulation, cataloging and other automated library functions, and the cooperative sharing among public, academic, school and special libraries. Because of the Public Access Catalog (PAC) and statewide databases on the web, schools, museums, businesses and individuals have access to the wide array of resources selected for consumer use. A brief history of the WYLD system may be found in the supplemental materials at will.state.wy.us/ldo/directors/historyofWYLD.pdf.

The terms "WYLD member" or "WYLD library" are often used in meetings, planning and automation discussions. This term refers only to the libraries that pay a fee to use the integrated library system. Those libraries are listed at will.state.wy.us/wyld/network/members.cfm

The WYLD Network describes the organizational structure of this cooperative venture. Within this structure, the governing board works with the Wyoming State Library to set policies and establish the cost sharing formula necessary to run the system. The regional council is composed of representatives from the six regions to deal with procedural issues in using network resources. Standing committees include fees/budget, governance/bylaws, nominating, online quality and training. Additional committees look at the public WYLDCat interface and assess the selection of shared databases.

At the state library the WYLD office manages the integrated library system (ILS) and Web servers, provides technical assistance to libraries, monitors telecommunications and plans new developments for WYLD. The state library and WYLD member libraries share the cost of the system. A formula exists through which the local library and state library share the projected annual cost for WYLD services and operations, including vendor hardware and software

maintenance fees, and some organizational costs. This cost and formula are reviewed annually by the WYLD Governing Board with the Wyoming State Librarian.

The WYLD Annual Meeting, generally held in the spring of each year, serves as the time for organizational business and training.

Complete information on WYLD, its governing structure, regional representation, meetings, email discussion lists and projects may be found at will.state.wy.us/wyld/wyldco.html.

Administration, Governance and Fees

WYLD resources are administered and managed by the Wyoming State Library. The WYLD consortium is governed by member libraries – those that participate in WYLDCat. All 23 county library systems are WYLD members, and only a handful of their branches are not in the system. The 7 community colleges, as well as some school and special libraries, are also WYLD members, although the University of Wyoming is not. A list of members may be found at will.state.wy.us/wyld/network/members.cfm

Loan periods are set by the local library system. The WYLD network sets database guidelines and the WYLD card policy, which allows a cardholder from any WYLD library to check out from any other WYLD library. WYLD bylaws, strategic plan, organizational chart and more on governance can be found at will.state.wy.us/wyld/wyldco.html.

The cost of the ILS is split between the Wyoming State Library and WYLD members. A past breakdown of fees may be found at will.state.wy.us/wyld/network/cost_breakdown.html, although the fee structure is expected to change. The WYLD Network pages at will.state.wy.us/wyld/wyldco.html are a good resource as changes occur.

WYLDCat

wyld.state.wy.us

WYLDCat is the public side of the SirsiDynix shared catalog, while JavaWorkFlows (JWF) is the staff side. An additional product, Directors' Station, allows you to run a wide variety of reports using the ILS data for your library and others. The ILS runs on SirsiDynix Symphony with circulation, acquisitions (+9xx order interface), serials control, academic reserves, materials booking, outreach services, authority control, SD e-Library Web public web interface, web services and SirsiDynix Enterprise catalog discovery layer. OCLC VDX (Virtual document exchange) is the interlibrary loan (ILL) middleware that enables patron-initiated ILL.

Through SirsiDynix, you have access to a product called Directors' Station that will allow you to pull detailed statistics to help you make service and collection decisions. Training and assistance on Directors' Station is available from WSL.

Technical support for WYLDCat is provided by the Wyoming State Library. Contact information for the help desk, database guidelines and more may be found online at will.state.wy.us/wyld/docs/.

GoWYLD

The Wyoming State Library and University of Wyoming Libraries use state and federal funding to purchase electronic information resources that are licensed for use by any Wyoming resident either at a library or from home with a library card and PIN. These are accessed through the portal at gowyld.net.

These include databases of journal articles, reference materials, tools for early childhood literacy, genealogical information, foreign language courses, tutorials on building a resume, e-books and e-magazines. GoWYLD.net lists these plus selected free, reliable resources from the Internet. The WYLD Shared Purchases Committee (will.state.wy.us/wyld/sharedpurchases/) evaluates these products on a regular basis.

The WSL Library Development Office regularly offers webinars and creates video tutorials on using the GoWYLD.net databases. These may be found on the State Library's webinar archive page at will.state.wy.us/ldo/webinararchive.html or its YouTube channel at www.youtube.com/user/wyomingstatelibrary. Upcoming webinars are announced in the Wyoming State Library Training Calendar at www.wyominglibraries.org/calendar.html and through the "all@" email lists.

Email Lists

A good way to keep updated and to connect with your colleagues across the state is to sign up for the @will email lists. Find them at will.state.wy.us/wyld/email/.

Wyoming Library Association

www.wyla.org

The Wyoming Library Association (WLA) is the professional organization for those employed by or associated with libraries. The organization's vision is that:

> *The educational, cultural, and economic conditions of the State will be advanced through greater use of libraries and an enhanced awareness of the vital role libraries fulfill in society.*

Joining WLA is a great way to become more involved with library issues and to network with others across the state. A county library may have a tradition of paying the memberships for director, board and staff so check to see if that support is there.

WLA success is dependent upon volunteers for committees, section offices and leadership positions. The director's own commitment to work for the association, and to support staff asked to serve, is important to its continuing success. The association is as good as directors help it become. Directors can expect to be drawn to interest group, advisor roles or committee work soon after assuming the post of library director, as leadership talents will be sought by association officers and committee chairs.

WLA Conference

conference.wyla.org

Each fall, the Wyoming Library Association holds a conference where you will find professional development opportunities for yourself, your staff and your board. The program includes a wide range of presentations, panels and workshops on library services and issues and numerous opportunities to network with your colleagues across the state.

Legislative Committee

www.wyla.org/legislative/

This committee is responsible for monitoring, initiating, researching and coordinating legislative efforts for libraries in Wyoming. Although activities are primarily focused on the activity of the state legislature, it also tracks national and local issues and entities within state government. The members of the Legislative Committee can introduce directors to the intricacies of bill sponsorship and preparation, directors' role in contacting legislators, and sharing information with library supporters in their county.

Legislative Reception

One of the Legislative Committee's projects is an annual reception at the Wyoming State Library held during the Legislative Session. This is an opportunity for directors and others, especially board members, to meet with their legislators in support of proposed library-related legislation and to thank them for their past support of libraries. The Wyoming Library Association's lobbyist reports on pertinent bills in a brief session before the reception opens.

The executive board of WLA, working statewide committees, State Library and other groups use the first half of the legislative reception day to conduct board business, work on planning projects or offer training.

Intellectual Freedom Advisor

www.wyla.org/advisor/freedom/

The person in this position is available to answer questions on intellectual freedom issues, such as if your library is facing a book challenge or Internet filtering controversy.

Email Lists

A good way to keep updated and to connect with your colleagues across the state is to sign up for the WLA email lists. Find them at www.wyla.org/wla-email-lists.

Other Library Associations

State, regional and national library associations are another way to become more involved with the library community. Here are some that may be of interest:

Mountain Plains Library Association

www.mpla.us

The Mountain-Plains Library Association (MPLA) is a twelve state association of librarians, library paraprofessionals and friends of libraries. Its purpose is to promote the development of librarians and libraries by providing significant educational and networking opportunities. One Wyoming Library Association member is elected as MPLA Representative for a three-year term to represent Wyoming interests in governing matters.

American Library Association

www.ala.org/

Founded in 1876, ALA provides leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance

learning and ensure access to information for all. One Wyoming Library Association member is elected for a three-year term to represent Wyoming interests on the ALA Council, the policy-making body. The American Library Association maintains email discussion lists on a wide variety of topics. Find them at http://lists.ala.org/sympa.

Public Library Association (PLA)

www.ala.org/pla/

The Public Library Association is a division of ALA. PLA provides communication, publication, advocacy, continuing education, and programming for its members and others interested in the advancement of public library service.

Association for Rural & Small Libraries (ARSL)

http://arsl.info/

The Association for Rural & Small Libraries, Inc. strives to create resources and services that address national, state, and local priorities for libraries situated in rural communities.

United for Libraries

http://www.ala.org/united/

United for Libraries is a division of the American Library Association for library boards, advocates, foundations and friends groups.

Wyoming Library Endowment Challenge

www.wyla.org/endowment/

Every Wyoming county library system has a library foundation tasked with raising and managing funds from the private sector for the immediate needs and long-term health of the library. Fundraising does not take the place of local governmental support. Tax dollars should support basic services while donations enhance them.

Endowment funds, where the principal is held intact, support the long-term needs of your library. In 2008, the State Legislature created the Wyoming Library Endowment Challenge, a fund that matches endowment dollars raised locally 1:1, 2:1 or 3:1, depending on the county's assessed valuation. Each library foundation is eligible for up to $697,826 in matching funds for donations raised by June 30, 2017. An additional $100,000 per library in incentive funds were distributed when collective fundraising totaled $2.3 million. In all, $18.35 million has been appropriated for this fund.

Endowment fundraising can be challenging, as it looks to long-term stability rather than immediate needs. However, the endowment challenge is a unique opportunity for your library to turn $1 into $2, $3 or $4. To learn more:

- *Wyoming Library Laws* includes the full text of the Wyoming Library Endowment Challenge statute, Title 18, Chapter 7, Article 2 (will.state.wy.us/slpub/LibLaws.pdf).
- The Wyoming Library Association maintains an endowment information page at www.wyla.org/endowment/.
- The state library's *Foundations* newsletter provides ongoing information to library foundations about the endowment challenge along with general information on endowments, fundraising and foundations: will.state.wy.us/slpub/foundations.

McMurry Library Endowment

The Carol McMurry Library Endowment was established in 2000 within the Wyoming Community Foundation to provide support to Wyoming librarians and publicly accessible Wyoming libraries in three areas:

- Education & Training (Library and Individual)
- Library Resources
- Library Foundation Development

The endowment has grant money available for library needs and to individuals for training and continuing education. Board members are eligible to apply for the training grants. It's a competitive process with several opportunities to apply each year:

- Library grants – will.state.wy.us/mcmurry
- Grants to individuals – will.state.wy.us/mcmurry/indivgrants.html

Wyoming Library Leadership Institute

will.state.wy.us/training/wlli.html

The Library Leadership Institute exists to provide opportunities for learning, mentoring and developing leadership skills to promote the personal and professional growth of the Wyoming Library Community. It is open to both degreed and non-degreed individuals in leadership roles. It is not a workshop on becoming a library director or a workshop on library administration.

Relationships

The role of the public library is both managerial and political. The success of your library will depend on your ability to work with a with a wide variety of stakeholders – everyone from the county commissioner who holds your budget in his or her hands to the patron coming in to use your computer room to the library page shelving your books.

Board of Trustees

Perhaps the most important relationship you will build is with your library board. The keys to working with your board are respect, communication, and tact. The *New Library Directors Handbook* from the Montana State Library offers these tips:

- Spend the first year building trust. Get to know your library board members. Ask them questions like: What do they think of the library? Where do they want the library to go?
- Pick your issues carefully. Bring up major things, but don't bother the board with things that are only mildly irritating.
- Remember the board and library have a history. Respect that.
- If a board member has an idea that is not feasible for the library, point out some of the practical difficulties. Treat the request with respect and tact. Let the board member know that you are not comfortable with acting on the idea without board approval and that you will add the item to the agenda.
- If the board makes a decision you do not agree with, it is still your duty to carry through. 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. Document any problems that are created and bring them to the board. If the decision turns out to be a good one, compliment the board on it.

Duties of the Director

The library director is appointed by the library board per WS 18-7-104. The director:

- Assumes full responsibility for all personnel decisions, recruitment, and organization, including hiring, firing and disciplining
- Maintains the daily responsibility for library operations
- Has the fiduciary responsibility for the library
- Develops programs

- Recommends and carries out policies and programs established by the board
- Works with the board to establish the library's strategic direction
- Acts as liaison among the library board, the library foundation, and friends of the library

Duties of the Library Board

The primary functions of the library board are set out in Wyoming Statute 18-7-101 to 18-7-106. The board is to:

- Budget and expend funds for the operation of the library
- Receive and be responsible for money and property to be used for the maintenance and operation of the library
- Set policy
- Set a strategic direction for the library
- Appoint and supervise a library director

The library board is appointed by the county commissioners. The appointment procedure may vary from county to county, so directors should check with their commissioners to find out how it is done locally. Library board members should work to communicate with commissioners on a regular basis to ensure the commission understands library issues, board actions, initiatives or problems.

Director Evaluation

The board should evaluate the director's progress in writing annually. If there is no library director evaluation policy, encourage your board to create one. Has the director moved the library forward as set forth in the long-range plan approved by the board? This is the key evaluation point.

There are many resources your board may use for your evaluation. The Mid-Hudson Library System in New York has developed a director evaluation tool that helps the board structure the evaluation around five areas:

1. Customer service and community relations
2. Organizational growth
3. Administration and human resource management
4. Financial management and legal compliance
5. Board of trustee relationship

Information about the MHLS model and a customizable evaluation form may be found at midhudson.org/trustee/dir_eval.htm.

There should be no real surprises during the evaluation if there are established lines of communication with the board president and library trustees.

From Handbook for New Public Library Directors in New York State

Library Boards Reading List

For more information on library boards, please consider consulting:

- *Wyoming Public Library Board Members' Handbook*, Wyoming State Library. August 2013. will.state.wy.us/ldo/boards/handbook.html

These titles are held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog at wyld.sdp.sirsi.net/client/wsl.

- **The Successful Library Trustee Handbook**, Mary Y. Moore. Chicago : American Library Association, 2010. WSL collection –.
- **The Complete Library Trustee Handbook**, Sally Gardner Reed and Jillian Kalonick for the Association of Library Trustees, Advocates, Friends and Foundations. New York : Neal-Schuman Publishers, c2010.

Elected Officials

The most effective library advocates know that it is necessary to cultivate good relations with elected officials all year long and not only when the library's budget comes up for a vote. It is critical to keep city or county officials informed of library successes as much as concerns:

- Start with officials you know support the library.
- Recognize that officials are not experts on everything. Provide fact sheets or background material when needed.
- Do your homework and get to know your elected official. Link the library message to something you know relates to their personal circumstance, interest or experience.
- Don't guess or give misinformation. If you do not know the answer, tell the official you will find out the facts and get back to them as soon as possible.
- Be personal and share real-world stories from your library.

The effective library advocate maintains contact with elected officials, knows how to shape the message, knows who can get to decision makers, understands the importance of timing, writes effective communications, informs and educates, and always says thank you.

The American Library Association's *Library Advocate's Handbook* is a good source for further information. (www.ala.org/offices/ola/libraryadvocateshandbook)

Adapted from Manual for New Directors of Public Libraries in Utah, 4th ed.

County Commissioners

The county commissioners appoint your library board members. The director will interact with commissioners on a variety of business transactions conducted in county offices. The director always needs to remember what key issues are affecting the library so when asked questions, he or she can incorporate those issues into a library-related response. The director may want to attend commissioner, department head and related meetings since some agenda items may need a librarian to uncover useful information at the library or through statewide information networks.

County commissioners determine the revenue the library will receive as part of the county 12-mill tax structure. Commissioners may veto line items, projects or entire categories of the library budget. The director and/or the library board may present the budget proposal to the county commissioners.

Other Local Government

It is important to maintain a strong working relationship with members of all governing boards affecting library operations. Many Wyoming public libraries maintain partnerships between city and county entities.

Library directors may want to attend meetings at least annually, provide quarterly reports, serve on committees, or do whatever they can to become appreciated as team players in their political communities.

State Legislators and Elected Officials

With Wyoming's small population and part-time legislature, it is likely you will have more access to your state legislators and the top five elected officials than you would have in other

states. Although they do not make local funding decisions, they deal with legislation that can affect your library. You may want to:

- Become familiar with who your local legislators are. A directory may be found on the Wyoming Legislature's website at legisweb.state.wy.us/LSOWEB/LegInfo.aspx.
- Make plans to attend the Wyoming Library Association's legislative reception in Cheyenne during the session.
- Consider becoming involved with the WLA's Legislative Committee: www.wyla.org/legislative-committee.

Library Staff

The library director has authority over all staff members. Staff should resolve ALL work issues with the supervisor and library director. The director generally carries out all personnel actions under library board policy including hiring, compensation, performance review and, if necessary, termination. In small libraries, the director may also be responsible for training, scheduling and task supervision.

The board should not entertain any initial protests, complaints or requests for meetings from the staff related to work hours, salary, work duties or other general employment issues. The board must respond if staff members (or others) accuse the director of malfeasance, theft, criminal activity or unethical actions related to work.

Libraries should have grievance procedures in place if they are not already covered by county grievance policy.

A lengthier discussion of personnel issues is included later in this handbook.

Foundation and Friends

Your library foundation and friend(s) groups can make the difference between a good library and an excellent library. While the county bears responsibility for funding of basic library services, these groups often fundraise to provide the extras and provide volunteer manpower. Financial and volunteer help from your foundation and friends should *enhance* library services, not substitute for public funding.

Every Wyoming library has a foundation, but not all have a friends group or groups. One important thing to remember is that these are separate entities from the library with their own governance. The library board holds no authority over them, nor should the library share with

them any privileged information, such as patron records. The library board holds ultimate authority over what happens with the library system. Your friends and foundation might provide input, but they should not interfere with the governance or management of the library.

In a few counties, the library board will also serve as the foundation board. Where the boards are separate, those serving on the library board should not also be voting members of the friends or foundation boards. Ex-officio board liaisons are a good way to facilitate communication.

The American Library Association has a division specifically for trustees, foundations and friends: United for Libraries, http://www.ala.org/united/.

Library Foundation

The primary distinction between a friends of the library group and a library foundation is that a library foundation has the single purpose of raising private funds to support special projects, endowments or building projects. Your foundation is a legally established 501(c)3 entity that allows donors to treat their donations as tax-deductible contributions. The responsibility for running a foundation is in the hands of a public board of directors. The library foundation board may be the library board; more often it is composed of interested community members. All library foundation activities shall comply with the applicable state and federal laws, rules and regulations.

Currently, most Wyoming foundation boards are actively working toward the Wyoming Library Endowment Challenge, which leverages state matching funds for local endowment fundraising. The challenge allows library foundations to turn each dollar raised into $2, $3 or $4, depending on the county. A lengthier discussion of the challenge may be found in the “Wyoming Library Landscape” section of this handbook.

Friends of the Library

Friends organizations are groups of citizens who join together to support, improve and promote the library. Some are formally incorporated, not-for-profit bodies; some are informal groups of library supporters. A friends of the library group can raise funds, sponsor specific projects, provide volunteers, advocate for the library and serve as a visible presence of support in the community.

Friends do not have a policymaking role; they are meant to help improve and extend services. Just as the public library promotes the common good of the community, so too can the community work to promote the good of the library.

A friends of the library group works to:

1. Provide for the library's active expansion and participation in community life;
2. Raise funds for the library;
3. Promote the importance of good library service to everyone; and
4. Encourage the use of the library as a center for the educational and cultural life of the community and to sponsor educational and cultural programs for the community.

Friends groups should keep in close contact and act in cooperation with the director and library board.

Volunteers

Volunteers are individuals who are invaluable to the library. Volunteers do not replace staff members, but they do work on special projects or help with library work or activities on a regular basis. Your friends of the library group may provide volunteers, or they may be recruited from the wider community. The library should have someone on staff who serves as the point of contact for volunteers and coordinates volunteer recruitment, orientation, assignments and other tasks.

Volunteers Reading List

Please see the appendices for a lengthy discussion on running a successful volunteer program from the Montana State Library's *New Library Director's Handbook* (2011).

These titles are held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog at wyld.sdp.sirsi.net/client/wsl.

- **Managing Library Volunteers**, Preston Driggers and Eileen Dumas. Chicago : American Library Association, 2011.
- **Teen Volunteer Services in Libraries**, Kellie M. Gillespie. Lanham, Md. : VOYA Books, 2004.

The Public

The people in your community ultimately hold your funding in their hands, either at the ballot box for special library initiatives or through their contacts with the county commissioners. For members of your community, the director embodies the essence of the library. What the public sees in the director IS the institution. Directors need to continually remember their leadership role in the relationship.

Directors of small libraries may serve as circulation, ILL and reference librarians giving them frequent contact with customers. As administrators, directors create a library atmosphere and personality through public relation efforts, program presentations and lobbying. The director should be visible in the community outside the library, for example, by joining service groups and making presentations.

Public opinion about the library is significantly influenced by the policies and procedures that are in place governing the use of the library and the quality of service that library users receive when they visit the library. Directors are advised to work with their boards to develop thoughtful policies, store the written policies in a handy manual and ensure that the staff is trained to interpret and apply the policies appropriately and consistently.

Community Partnerships

Cooperation and collaboration are two initiatives that public agencies and private business have incorporated into their strategic efforts. Making contact with community members outside of the library walls is critical to promote the library's mission. The library must:

- Develop partnerships with other community groups.
- Network with other community organizations that have programs that complement the library's mission.
- Identify volunteers, including board members and friends, willing to act as advocates for the library's mission at the local, state and national levels.
- Communicate regularly to promote the library with:
    - Business groups,
    - Civic and other non-profit organizations,
    - The education community,
    - Foundations, and
    - Governmental agencies.

No organization can progress in reaching its goals without partnering with other groups that have similar or compatible interests. Librarians need to work with the school district, educators,

media professionals, community organizations (Chamber of Commerce, Kiwanis, etc.), historians, government officials, business people and other community agencies to achieve recognition as an important partner in community projects.

Legal Issues

As a director, you will have to contend with legal issues, some of which overlap professional ethics. These include intellectual freedom, patron privacy, public meetings, open records and employment. It is a good idea to familiarize yourself with the pertinent laws and direct questions to your legal counsel. This handbook is a summary only and should not be construed as legal advice

Wyoming Statutes

Two good resources for finding Wyoming law are:

- *Wyoming Library Laws*
  will.state.wy.us/slpub/LibLaws.pdf
  This document is an extraction of laws from the Wyoming Statutes related to the organization and management of the county libraries.
- Wyoming State Legislature website
  legisweb.state.wy.us/LSOWEB/wyStatutes.aspx
  Full text of all Wyoming statutes in plain text, downloadable and annotated formats.

You should have a print copy of the most recent *Wyoming Statutes Annotated* in your library.

Some of the important Wyoming statutes related to county libraries include:

- **County Libraries:** 18-7-101 through 18-7-106 – describes the incorporation process, board duties and other general information.
- **Wyoming Public Library Endowment Challenge:** 18-7-202 through 18-7-205 – provides for state matching funds for local endowment fundraising.
- **Patron Privacy:** 16-4-203 (d)(ix) – protects library circulation and registration records except as required for the administration of the library or except as requested by a custodial parent or guardian to inspect the records of his or her minor child.
- **Public Meetings:** 16-4-401 through 16-408 – describe requirements for open meetings and executive sessions and penalties for violations.
- **Fiscal Procedures:** 16-4-102 to 16-4-125 – is the "Uniform Municipal Fiscal Procedures Act" that describes the processes in submitting budgets and managing appropriations.

Public Meetings

As a public agency, your duty is to conduct the business of the library in public. Wyoming Statute Title 16, Chapter 4 (401-408) lays out the requirements. Among them:

- The public must be notified of your meetings. It is good practice to notify local media of the times and dates for your meetings and ask if they would like notice, to comply with 16-4-404(a).
- All meetings must be open to the public, other than executive sessions.
- Any board actions must be taken in a public meeting.
- Members of the public do not have to identify themselves to attend.

Members of the public may be asked for their name and affiliation if they ask to be recognized (16-4-403(b)) and may be removed if they are willfully disrupting the meeting (16-4-406).

There are a number of exceptions for executive sessions closed to the public, outlined in 16-4-405. These include:

- Meeting with attorneys or officers of the law on matters posing a threat to the security of public or private property or a threat to the public's right of access;
- Personnel matters;
- Litigation or proposed litigation to which the library is or may be a party;
- Matters of national security;
- To consider the selection of a site or the purchase of real estate when the publicity regarding the consideration would cause a likelihood of an increase in price;
- To consider acceptance of gifts, donations and bequests that the donor has requested in writing be kept confidential; and
- To consider or receive any information classified as confidential by law.

No action may be taken in executive session. Board members should not take a “straw poll” vote or make any kind of agreement on how to vote before emerging from executive session. The executive session must be noted in the regular meeting minutes. If no action is taken on the matters covered in the executive session, that should be stated in the board minutes. Minutes must be kept of the executive session itself, but they are not public information. These should be filed separately from the regular meeting minutes. Action taken at a meeting not in conformity with Wyoming’s public meeting laws is null and void.

Patron Privacy

Protecting patron privacy is an ethical and legal obligation. This guidance was first published in the *New to Use* newsletter:

- **What types of patron records must be protected?**
  A patron record includes their registration information and any transactions, such as checkouts, fines, reference questions and computer use.
- **What does the law say about patron privacy?**
  In Wyoming Statute, patron privacy is addressed specifically in Title 16, Chapter 4, Article 2 – Public Records. It states that the custodian of the records "shall deny the right of inspection" to library patron transaction and registration records, unless otherwise provided by law.
- **Who is the "custodian of the records?"**
  If it is a record in the WYLD system – patron registration, checkouts, fines, etc. – the custodian is the Wyoming State Librarian. That is the only person authorized to release records from WYLD. If these are locally created records, such as reference transactions or computer sign-in sheets, consult with your county attorney as to who is the legal custodian.
- **Are there any exceptions?**
  A custodial parent or guardian may inspect the records of his minor child. The custodian of the records may also release information in response to a valid court order. Legal counsel should be sought before releasing any information in response to a court order.
- **What should be done if the library receives a request for patron records?**
  If it is information held in the WYLD system, contact the Wyoming State Librarian. For locally created records, contact your county attorney. Library staff should be aware that they cannot divulge any protected patron information and should refer all requests from law enforcement or others to the library director.
- **May I provide access to patron information for our friends group or foundation?**
  No. Although your friends and foundations may feel like they are part of your library, they are separate legal entities and do not have the right to access patron records such as names, addresses or phone numbers.
- **Is there any other protected information I should know about?**
  Also protected by Wyoming Statute are records of library materials contributed by private persons, to the extent of any limitations placed as a condition of the donation.

For questions, contact the Wyoming State Librarian at 307-777-5911.

Procedures Affect Confidentiality

Library operating procedures have an impact on confidentiality. The following recommendations are suggestions to bring library procedures into compliance with most state confidentiality statutes, ALA policies on confidentiality and the librarians Code of Ethics:

- Avoid creating unnecessary records. Only record a user's personally identifiable information when necessary for the efficient operation of the library.
- Avoid retaining records that are not needed for efficient operation of the library. Check with your local governing body to learn if there are laws or policies addressing record retention and in conformity with these laws or policies, develop policies on the length of time necessary to retain a record. Assure that all kinds and types of records are covered by the policy, including data related logs, digital records, and system backups.
- Be aware of library practices and procedures that place information on public view; e.g., the use of postcards for overdue notices or requested materials, staff terminals placed so that the screens can be read by the public, sign in sheets to use computers or other devices, and the provision of titles of reserve requests or interlibrary loans provided over the telephone to users' family members or answering machines.

Patron Privacy Reading List

These titles are held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog for these at wyld.sdp.sirsi.net/client/wsl.

- **Privacy and Confidentiality Issues: a Guide for Libraries and their Lawyers.** Theresa Chmara. Chicago: American Library Association, 2009.
- **Law and Libraries: the Public Library**. Lee Ann Torrans. Westport, Conn.: Libraries Unlimited, 2004.
- **What Every Librarian Should Know about Electronic Privacy**. Jeannette Woodward. Westport, Conn.: Libraries Unlimited, 2007.

USA Patriot Act

This law expanded the authority of the Federal Bureau of Investigation and law enforcement to gain access to business records, medical records, educational records and library records, including stored electronic data and communications.

The American Library Association has resources on the Patriot Act:

- Resources: www.ala.org/offices/oif/ifissues/usapatriotact
- History: www.ala.org/advocacy/advleg/federallegislation/theusapatriotact

Employment Law

Local government entities, such as your library, are required to comply with state and federal employment laws. Compliance with employment law should be built into your personnel policies, and any changes to those policies must take into account state and federal law.

Many resources are available to you from state and local government to inform yourself about relevant employment laws.

Wyoming Resources

- Wyoming labor laws are found primarily in Title 27 of Wyoming Statute legisweb.state.wy.us/statutes/statutes.aspx?file=titles/Title27/Title27.htm
- Selected statutes from Title 27 are published in *Wyoming Library Laws* will.state.wy.us/slpub/LibLaws.pdf
- The Wyoming Department of Workforce Services (wyomingworkforce.org/employers-and-businesses/Pages/default.aspx) offers resource pages for employers on many topics, including:
    - Labor Standards wyomingworkforce.org/employers-and-businesses/labor-standards/Pages/default.aspx
    - Occupational Safety & Health wyomingworkforce.org/employers-and-businesses/osha/Pages/default.aspx
    - Unemployment Insurance Benefits & Tax wyomingworkforce.org/employers-and-businesses/unemployment-insurance/Pages/default.aspx

- Workers' Compensation wyomingworkforce.org/employers-and-businesses/workers-compensation/Pages/default.aspx

Federal Resources

- Summary of the Major Laws of the Department of Labor www.dol.gov/opa/aboutdol/lawsprog.htm
- U.S. Department of Labor Employment Law Guide: Laws, Regulations, and Technical Assistance Services www.dol.gov/compliance/guide/index.htm
- U.S. Department of Labor elaws: Employment Laws Assistance for Workers and Small Businesses www.dol.gov/elaws/
- Laws enforced by the U.S. Equal Employment Opportunity Commission www.eeoc.gov/laws/statutes/index.cfm
- Information & Technical Assistance on the Americans With Disabilities Act www.ada.gov/

Selected Labor Laws

This abbreviated list highlights employment law most commonly encountered in the workplace. Consult your legal counsel when there are any questions. This list is not exhaustive.

- **Affordable Care Act –** Also known as "Obamacare," this act is intended to ensure health insurance coverage for all Americans and to reduce health care costs: www.healthcare.gov/.
- **Age Discrimination in Employment Act (ADEA) –** prohibits employers from discriminating against employees 40 years of age and older: www.eeoc.gov/laws/statutes/adea.cfm.
- **Americans with Disabilities Act (ADA) –** protects individuals with disabilities from discrimination in regard to job application processes, hiring, promotion, termination, compensation, job training and other conditions of employment: www.ada.gov/.
- **Civil Rights Act of 1964, Title VII –** prohibits employers from discriminating against employees or applicants based on race, color, national origin, religion or sex. The Civil Rights Act of 1991 provides monetary damages in cases of intentional employment discrimination: www.eeoc.gov/laws/statutes/titlevii.cfm.
- **Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) –** requires employers to offer temporary continued health coverage, at the employee's expense, to employees and their dependents who would otherwise lose coverage. Events that

trigger COBRA benefits include death, employment termination, job status changes, marital status changes and loss of dependent child status: www.dol.gov/dol/topic/health-plans/cobra.htm.

- **Electronic Signatures in Global and National Commerce Act –** allows electronic signatures to be used on a variety of personnel documents, including acknowledgment of personnel policies, open enrollment and benefit applications. One exception is cancellation of health insurance or other benefits: www.gpo.gov/fdsys/pkg/PLAW-106publ229/pdf/PLAW-106publ229.pdf.
- **Employment At-Will –** contract law stating that employment can be terminated at any time by either party for any reason that is not illegal. An employer may not fire an employee for discriminatory reasons, for reporting harassment or for exercising their legal rights: www.nolo.com/dictionary/at-will-employment-term.html.
- **Equal Employment Opportunity (EEO) Laws –** Include the Civil Rights Act of 1964, the Americans with Disabilities Act and the Age Discrimination in Employment Act, among others. The U.S. Equal Employment Opportunity Commission (EEOC) enforces all of these laws: www.eeoc.gov/facts/qanda.html.
- **Equal Pay Act of 1963 (EPA)** – protects men and women who perform substantially equal work in the same establishment from sex-based wage discrimination.
- **Fair Labor Standards Act (FLSA) –** establishes minimum wage, overtime pay, record-keeping and child labor standards for non-exempt employees: www.dol.gov/compliance/laws/comp-flsa.htm and www.dol.gov/whd/flsa/.
- **Family and Medical Leave Act (FMLA) –** allows employees to take up to 12 weeks leave in any 12-month period for the birth or adoption of a child, or if the employee or one of their family members has a serious health condition. Paid sick and vacation leave accumulated by the employee is used until depleted; any remaining leave time needed is unpaid: www.dol.gov/whd/fmla/.
- **Federal Insurance Contributions Act (FICA) –** an employment tax that pays for retirement benefits through Social Security and Medicare. Employers withhold employees' share of FICA taxes from paychecks and then pay a matching amount: www.irs.gov/pub/irs-pdf/p15.pdf.
- **Immigration Reform and Control Act (IRCA) –** prohibits employers from knowingly hiring or continuing the employment of aliens who are not authorized to work in the United States. When an applicant is hired, the employer must sign an I-9 Form, attesting that it has verified the applicant's identity and authorization to work in the United States: www.uscis.gov/sites/default/files/USCIS/Resources/E3en.pdf**.**
- **Jury Systems Improvement Act of 1978 (JSIA) –** JSIA prohibits employers from discharging, intimidating or harassing employees who are selected for jury duty: www.law.cornell.edu/uscode/text/28/1875.

- **Military Laws: Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA) –** prohibits employers from discriminating against employees in the area of hiring, promotion, training, or any other employee benefits for the employee's past, present and future participation in uniformed services: www.dol.gov/compliance/laws/comp-userra.htm.
- **Occupational Safety and Health Act (OSHA) –** requires employers to maintain health and safety standards at the workplace, and requires the workplace be free from recognized hazards: www.OSHA.gov and wyomingworkforce.org/employers-and-businesses/osha/Pages/default.aspx.
- **Pregnancy Discrimination Act –** prohibits an employer from treating pregnancy, childbirth, or related medical conditions any differently than it treats other temporary disabilities as it relates to hiring, firing, promotion, seniority, leaves of absence, benefits, pay increases, etc.: www.eeoc.gov/laws/statutes/pregnancy.cfm.
- **Unemployment Insurance** – provides temporary payments to employees who were fired without cause. As with Worker's Compensation, you will pay unemployment insurance to the State of Wyoming as part of your payroll costs: wyomingworkforce.org/employers-and-businesses/unemployment-insurance/Pages/default.aspx.
- **Wage Garnishment Laws –** Title III of the Consumer Credit Protection Act limits the amount of an employee's disposable earnings that can be garnished: www.dol.gov/whd/regs/compliance/whdfs30.pdf.
- **Workers' Compensation –** provides workers with medical care, wage compensation and disability benefits for workplace injuries. These laws also protect employers from litigation: wyomingworkforce.org/employers-and-businesses/workers-compensation/Pages/default.aspx.

Records Retention

While it might be tempting to clean out those old boxes of documents in the basement, it is important to first doublecheck the state guidelines for records retention to ensure you meet legal requirements for records retention. Depending on the record, you may be legally required to retain it permanently, or you may have to retain it a certain number of years before destroying it.

Legal Authority

WS 9-2-410 states: "All public records are the property of the state. They shall be delivered by outgoing officials and employees to their successors and shall be preserved, stored, transferred, destroyed or disposed of, and otherwise managed, only in accordance with W.S. 9-2-405 through 9-2-413."

WS 9-2-401(a)(v) defines "public record" to include the original and all copies of any paper, correspondence, form, etc., or other document, regardless of physical form or characteristics, which have been made or received in transacting public business by the state, a political sub-division, or an agency of the state.

Guidelines

The Records Management Unit of the Wyoming State Archives publishes guidelines on retaining and managing records at wyoarchives.state.wy.us/RM/Index.aspx. Libraries should refer to this site for the most recent retention schedules and guidelines. You will also find guidance on how to determine if that document is a record and contact information for Records Management staff who may assist you.

Other Legal Issues

A brief list of other laws that may affect you.

- **Americans with Disabilities Act (ADA):** libraries are subject to the ADA not just for personnel issues, but also for assuring that persons with disabilities can use the services of the library. This may be of particular concern during building or remodeling projects: www.ada.gov/.
- **Children's Internet Protection Act (CIPA):** places restrictions on the use of funding that is available through the Universal Service discount program known as E-rate (Public Law

106-554). These restrictions take the form of requirements for Internet safety policies and technology that blocks or filters certain material from being accessed through the Internet: www.ala.org/advocacy/advleg/federallegislation/cipa.

- **Uniform Municipal Fiscal Procedures Act:** A state law requiring local governments to develop, submit and manage budgets within defined parameters and using generally accepted accounting practices.

Law Enforcement Inquiries

As a matter of policy or procedure, the library administrator should ensure that

- The library staff and governing board are familiar with ALA policies on confidentiality Some of these are in the appendices. More information may be found at www.ala.org/advocacy/privacyconfidentiality/privacy/privacyconfidentiality.
- The library staff and governing board are familiar with Wyoming's confidentiality statute.
- The library adopts a policy on users' privacy and confidentiality that includes procedures for the staff and board to follow if the library is served with a court order for records or if law enforcement agents conduct inquiries in the library.
- The library staff is familiar with the library's policy on confidentiality and its procedures for handling court orders and law enforcement inquiries.

The American Library Association's Office of Intellectual Freedom offers a guide for preparing for and coping with law enforcement inquiries.
Find it at will.state.wy.us/ldo/boards/ALA-OIF-LawEnforcementGuidelines.pdf

Please note: if law enforcement requests information found in the WYLD system, such as patron registration or circulation information, the only person authorized to release that information is the Wyoming State Librarian, as he or she is the legal custodian of those records.

As always, the best course is to prepare before the "knock at the door." This is not legal advice but suggested guidance and direction so that local libraries can prepare themselves to do what is legal and appropriate. This information is taken from the ALA Washington Office:

Before a law enforcement inquiry:

- Consult Your Legal Counsel: You will need legal experts familiar with your unique situations and local and state laws to help make sure that your policies and procedures are appropriate and legal.

- Review Your Policies: Review and address your policies on retention of and access to all types of information.
- Plan for Service Continuity: Know what to do in the event that workstations, servers or backups are removed or made inoperable.
- Train Your Staff: Anyone on your staff could be approached by law enforcement. Every staff member should know what to do if he or she is presented with a request.

During an inquiry:

- Follow Your Policies: Policies and plans will not help if even one of the institution's employees do not understand or follow them.
- Consult Your Legal Counsel: Most inquiries made by law enforcement are lawful and in good order. However, it is imperative to call on your own legal counsel when presented with a request.
- Document Your Costs: The Patriot Act provides for some reimbursement of costs if an entity is asked by law enforcement to perform certain types of assistance in data collection.

After:

- Consult Your Local Legal Counsel: Seek advice to be sure you meet any legal requirements to conceal the inquiry or, conversely, to fulfill any legal requirements to disclose what records may have been released.
- Follow Up: Work with your counsel, implement your policies, pursue any appropriate reimbursements and be prepared to communicate with the news media. Determine whether you will have to maintain any subsequent information or records.

Intellectual Freedom

Intellectual Freedom is the right of every individual to both seek and receive information from all points of view without restriction. It provides for free access to all expressions of idea through which any and all sides of a question, cause or movement may be explored. Intellectual freedom encompasses the freedom to hold, receive and disseminate ideas.

It's been said that a good library has something to offend everyone, and yours is likely no exception. Public libraries serve an important role in democracy by providing materials that reflect all viewpoints. Intellectual freedom is a major concern of libraries. Individuals or groups may attempt to censor library materials that they feel are objectionable. The library has the responsibility of championing the cause of intellectual freedom, including fighting all censorship

efforts. This can be a difficult and uncomfortable responsibility, but it is necessary for the proper functioning of libraries.

The selection of library materials is an essential process that is strongly related to intellectual freedom. The library must have a written materials selection policy for the library that reflects the library's mission and goals. It should also clearly support the right of all members of the community to have access to a wide range of materials, including items that some people might find to be objectionable.

In some cases, persons objecting to library materials may attempt to persuade the library to remove those items. To address these attempts, your library board should adopt a policy and procedure for the filing of and the hearing of complaints. A good practice is to have a Reconsideration Form for patrons who want to challenge a book.

A great deal of information now comes through electronic means. Your library should adopt an Internet use policy that respects the rights of your patrons to freely access information.

Adapted from Kentucky Public Library Trustee Manual, 2012

Libraries should have the following documents written, accessible, current, and approved by the library board:

Mission statement: a general statement of the library's purpose, scope of activities, service priorities and primary service area.

Policies for materials selection, programs, exhibits, meeting rooms and other services: The American Library Association has provided good examples of policy statements online at www.ala.org/ or in its *Intellectual Freedom Manual* (available through WYLDCat – check to see if your library has the most recent edition). Printed copies of the Library Bill of Rights (www.ala.org/advocacy/intfreedom/librarybill) and Freedom to Read Statement (www.ala.org/advocacy/intfreedom/statementspols/freedomreadstatement) are good references to have for easy access. Both are included in this handbook's appendices.

Procedures for reconsideration of materials or services: This is the written procedure that will be followed by library staff when a patron requests that materials or services be reconsidered, and may consist of the following steps:

a) inform the complainant of his rights and the library's procedure,
b) ask that a Request for Reconsideration form be completed,
c) inform administration of the complaint,
d) review the material or service objectively with staff or a committee, and
e) present the library's recommendations to the complainant, administration and board.

The groundwork done before receiving a complaint may be the most important part of this process:

- Provide training in the principles of intellectual freedom for staff, board members, and volunteers.
- Train staff in the procedures for accepting complaints and requests for reconsideration.
- Incorporate the principles of library access into public relations.
- Develop working relationships with other community groups who may also support the principles of intellectual freedom.

Intellectual Freedom Resources

- The Wyoming Library Association has an Intellectual Freedom Advisor. Find contact information at www.wyla.org/advisor/freedom.
- *Intellectual Freedom Manual* supplementary website at ifmanual.org. This website is useful on its own, without the print manual. (See reading list for print manual.)
- The ALA Office for Intellectual Freedom has many resources on its website at www.ala.org/offices/oif.
- ALA USA PATRIOT Act information: www.ala.org/advocacy/advleg/federallegislation/theusapatriotact.
- Intellection Freedom Action News (IFACTION): information from the ALA Office of Intellectual Freedom – lists.ala.org/wws/info/ifaction.
- District Dispatch: ALA Washington Office blog – www.districtdispatch.org/. You can also sign up for it by email at capwiz.com/ala/mlm/signup/ or add the feed to your blog reader at www.districtdispatch.org/feed/.

See also the ALA policies in the appendices that include the Library Bill of Rights and Freedom to Read Statement.

Intellectual Freedom Reading List

These titles are held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog at wyld.sdp.sirsi.net/client/wsl.

- **Intellectual Freedom Manual, 8th ed.,** compiled by the Office for Intellectual Freedom of the American Library Association, Chicago: The Association, 2010. Your public library may have a copy of this book or one of its prior editions. If not, you may request it from the Wyoming State Library. Companion website at ifmanual.org.
- **The new inquisition: understanding and managing intellectual freedom challenges** by James LaRue. Westport, Conn. : Libraries Unlimited, 2007.

- **Protecting intellectual freedom in your public library: scenarios from the front lines** by June Pinnell-Stephens for the Office for Intellectual Freedom. Chicago : American Library Association, 2012.
- **True stories of censorship battles in America's libraries** edited by Valerie Nye and Kathy Barco. Chicago : American Library Association, 2012.

Policies

One of the most important responsibilities of library board members is the development of policies by which the library director, staff and board members can make consistent service and administrative decisions. These policies must adhere to the library's mission statement, follow local, state and federal laws and provide fair treatment of patrons and staff.

Written policies are essential to effective library operations. A policy manual helps ensure fair treatment of all patrons and staff, helps ensure conformity to local, state, and federal laws, and helps ensure quality service for everyone in the community. The policy manual will contain internal policies as well as directives from outside the organization such as personnel and labor laws.

During the first months as library director it is suggested that you conduct a policy audit to determine which of the essential policies are already in place at the library and which need to be developed.

Among the types of policies your library might have:

- Board
- Personnel
- Financial
- Collection development
- Circulation
- Library card
- Patron code of conduct
- Internet and computer use
- Ethics
- Nondiscrimination
- Intellectual freedom
- Customer service
- Unaccompanied minors
- Facilities
- Meeting rooms
- Confidentiality of patron records
- Cell phone use
- Interlibrary loan
- Public relations

From ACLB Public Library Trustee Handbook, Association of Connecticut Library Boards, 2011

A more complete list may be found in the appendices.

All policies:

- Must comply with the law. Your library's legal counsel should be consulted.
- Should be dated for the original adoption and the last review and/or revision.
- Should be recorded, compiled and organized for ready access in a policy manual. Every trustee should have a copy of the policy manual and must be familiar with its contents.
- Should provide an appeal mechanism for patrons or staff even if that mechanism is informal, such as a conversation with the director.
- Must be enforced impartially and consistently.

The library director is responsible for hiring, training, and supervising a competent workforce. The staff then enforces the library's service policies and is, in essence, the face of the library. The library staff is the most effective public relations tool the library has.

All employees should:

- Receive a copy of the personnel policies upon hiring.
- Receive training in the library's patron policies to ensure good service fair treatment of all patrons.
- Have a current library job description that contains a reference to desired customer relations skills.

Developing Library Policies

Developing policies to guide the operations of the library is one of the shared duties of the library director and library board of trustees. The director, with input from the staff, is responsible for articulating the policy issues to be addressed and proposing solutions that conform to generally accepted library practices. Prior to final adoption by the board, the policies should be submitted for review by the legal department of the local government to ensure the policy's enforceability.

You do not need to rewrite laws and professional standards within your policies — just adopt them or quote them. For example, it is recommended that the board adopt the following standard American Library Association (ALA) policies. You will find all of them in the appendices:

- Library Bill of Rights
- Free Access to Libraries for Minors: An Interpretation of the Library Bill of Rights
- Freedom to Read Statement

- Freedom to View Statement
- Confidentiality of Library Records
- Confidentiality of Personally Identifiable Information about Library Users

Customers and Services

This set of policies needs to identify all the services and conditions of service available to the public, the behavior expected of users and the mechanisms for customers to challenge any policies. These policies should be uniform among all library buildings in the system and explain the reason for any differences in practices in branches.

The public policy could include:

- Hours of operations
- Registration requirements
- Circulation practices
- Interlibrary loan
- Collection development
- Materials challenge process
- Behavior expectations
- Internet use

An Internet use policy is especially important in light of a wide range of concerns related to intellectual freedom, personal privacy, federal funds, illegal activities, child pornography and visual display of images

Collection Development Policy

The library must have a written policy for selecting and deselecting (i.e. deleting or weeding) materials from its collection. The collection development policy (aka material selection policy) is developed by the library director, assisted by library staff, and recommended for adoption by the library board. The policy must be grounded on the goals and objectives stated in the library's strategic plan, which specifies how the library will meet identified community needs.

The collection development policy should be reviewed periodically to ensure that it remains relevant in the library's and the community's changing environment.

A good rule of thumb is to review the complete policy when a new strategic plan is drafted. Periodically, the library director should assess how well the library collection is meeting the needs of the community.

Adapted from Manual for New Directors of Public Libraries in Utah, 4th ed

Collection development policy components include:

- Library mission
- Intellectual freedom
- Identifying formats and subjects to be added to the collection
- Gifts and donations
- Who selects materials
- Criteria for selection
- Complaints, concerns, challenges
- Deselection (weeding)

From New Library Directors Handbook, Montana State Library

Personnel

This set of policies defines all the practices and processes related to employees of the library. It is especially important that these policies be updated to reflect the most current policies created, modified or removed by the library board. Since the library is a county agency, some personnel policies may come from the county.

This set of policies could include:

- Recruitment practices
- Hiring practices
- Salaries and pay scales
- New employee probation if not employees-at-will
- Performance reviews
- Promotions
- Terminations
- Vacation and sick leave
- Personal leave (if applicable)
- Leave without pay

- Education leave
- Continuing education
- Fair Labor Standards Act
- Family and Medical Leave Act
- Wyoming Retirement System contributions
- Health insurance contributions
- Additional benefits
- Grievance procedures

Policies and Procedures

There is a difference between policies and procedures:

- **Policy:** A written statement that describes how things will be handled, setting the conditions and terms of a situation.
- **Procedure:** A written, step-by-step description of how the staff will carry out a policy.

Both policies and procedures can help library staff work more efficiently. Think of them as a way to keep your library running smoothly. Generally policies are more "philosophical," whereas procedures are practical. The board does not need to approve procedures.

Procedures are the step-by-step actions needed to carry out specific tasks. They should be written in sufficient detail so that someone unfamiliar with the job could perform the function; this is particularly important for training new employees. 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 procedures manual.

Consider putting all of your procedures in a manual or an easily accessible web page to make them easy to find. If your library doesn't have procedures written down, work with library staff to develop some. The person who does a particular job should be the one to write the procedure.

Typical procedures include:

- Opening and closing the library
- Circulation: check-out, check-in, etc.
- Interlibrary loan
- Ordering materials: how? who?
- Receiving/processing new materials

- Collecting statistics
- Setting up board meetings
- Special events, such as storytime
- 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

Policy Resources

There are many resources to guide you on policies. In the supplementary materials, the following sections from other states' handbooks are recommended:

- **Chapter 4** of the *ACLB Public Library Trustee Handbook*, Prepared by the Association of Connecticut Library Boards, 2011 will.state.wy.us/ldo/boards/Board_HandbookCT.pdf.
- **Chapter 5** of *the Maryland Library Trustee's Manual 2009*, Division of Library Development & Services, Maryland State Department of Education will.state.wy.us/ldo/boards/Board_HandbookMD.pdf.
- **Chapter 10** of the *Utah Public Library Trustee Manual*, Utah State Library Division, 2011. This one provides good examples of clear and unclear wording. will.state.wy.us/ldo/boards/Board_HandbookUT.pdf.

Policies Reading List

This title is held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog at wyld.sdp.sirsi.net/client/wsl.

- **The public library policy writer : a guidebook with model policies on CD-ROM** by Jeanette C. Larson and Herman L. Totten. New York : Neal-Schuman Publishers, c2008.

Personnel

Your board is authorized by statute to employ a qualified library director, meaning it is their job to hire, evaluate and, if necessary, discipline or fire the director. All other employees of the library are your responsibility. Because a Wyoming library is a county agency, some or all of your personnel policy may be dictated by county government.

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

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

A well-thought out policy is the heart of a good management system. Here are some of the things that should be included in a personnel policy:

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

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

Components of a Personnel Policy:

Some of these topics will be covered in greater detail later in this chapter:

- **General expectations of all employees:** Includes things like treating customers and co-workers with respect. It is a listing of what every employee should be doing.
- **Job descriptions for all positions:** Job descriptions are specific for each employee. Job descriptions are the most important part of a personnel policy because they are the basis for hiring, evaluation and discipline. They should include:
    - A detailed description of the results of the work to be done by the position.
    - A description of the minimum educational and experiential requirements of the person holding the position.
    - A description of other desired education and experiential traits of the person holding the position.
    - General description of compensation.
    - Description of benefits, including paid leave.
- **Description of staff development and continuing education opportunities:** List what types of development and continuing education opportunities exist for staff.
- **Hiring procedures:** Includes procedures such as whether or not you conduct more than one interview, how you recruit people and how you select people.
- **Job evaluation procedures:** how often do you evaluate someone and what methods do you use.
- **Procedures for promotion:** If you promote from within, state this in your policies. An employee promoted from within must meet the minimum qualifications in the job description and should have documented evaluations of better than average performance at their existing position. This is especially important if more than one employee has expressed an interest in being promoted to the higher position.
- **Disciplinary procedures:** If it is necessary to discipline an employee, what steps will you take? What is your disciplinary process?
- **Grievance procedures:** Employees may perceive a personnel problem differently from their supervisor. Because of this, employees should have a procedure to follow when they feel that they have not been treated fairly. The policy should clearly state the steps an employee must take when filing a grievance procedure. Employees should follow these procedures and <u>should not take personnel issues directly to the board.</u>
- **Procedures to terminate employment:** To protect yourself, clearly lay out what procedures you will follow when terminating an employee.

Hiring

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 in the local newspaper. The advertisement should briefly describe the position and the minimum requirements. It can also include the anticipated starting salary. Those interested should be encouraged to ask for further information and an application form from the library. You can also request a resume, if you would prefer that. Once someone asks for further information, you should include the complete job description and the anticipated salary (if this wasn't included in the paper). You may want to or be required to use county forms and procedures.

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. Applications received after the deadline should not be considered.

The best way of evaluating applications is to quantify information. If years of applicable schooling are important for the position, you could award a certain number of points for each year of schooling. The same can be done with years of relevant experience.

This scoring system needs to be worked out before looking at the applications. It should be applied in writing to each application.

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.

For higher-level positions, libraries may consider using webinar technology for interviewing candidates who live at a distance.

Here are some general guidelines for interviewing:

- Supply the applicant with a job description.
- Set aside a period of time for the interview either in your office or at a neutral site. 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 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, or is he merely looking for a paycheck? 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. Neither the applicant nor your library ultimately benefit when the wrong person is hired for the position.

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. There are many sources of interview questions; this is only a sample:

Can ask:

- What do you know about this library?

- Why do you want this job?
- What can you contribute to this library?
- Describe your ideal 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 characteristics are most important in a good manager?
- 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 motivates you? What de-motivates you?
- What work experiences have been most valuable to you and why?
- What sort of people do you find most difficult (easiest) to work with?
- What would you do if a patron came into the library angry? How would you handle the situation?
- Give me an example of a problem you solved and the process you used.
- Tell me about a project you initiated.
- Describe a situation you handled creatively.
- Describe a tough decision and how you reached it.

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

- Are you married? (Or variations, such as, "What does your husband 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.

Compensation

It is important to offer a competitive compensation package to attract and retain the best employees. Your board will set salaries, wages and benefits as part of the budgeting process. The compensation package offered to library staff is either equal to that of all county employees or is independent of county employee practices and based entirely on the personnel policies of the library board.

There are several resources available to guide you as you and your board work to set appropriate salaries and wages:

- **Wyoming public libraries salary survey:** This survey is conducted by the Wyoming State Library every two years, covering salaries and wage for every level from director to library page. Full data is available to directors and boards upon request. Because this survey contains personally identifiable data, only summary data is provided to others who request it. Request from the WSL Library Development Office.
- **Wyoming public libraries benefits survey:** This survey is conducted by WSL every four years to determine what benefits – such as retirement, health insurance and paid leave – libraries offer. Request from the WSL Library Development Office.
- **Economic Analysis Division website:** The cost of living can vary considerably from one Wyoming county to the next. The State of Wyoming Economic Analysis Division maintains resources about cost of living at eadiv.state.wy.us/WCLI/Cost.html.
- **Other states' salary information:** Many states collect and publish salary information. Links to the data may be found on the Public Library Statistics Cooperative wiki at plsc.pbworks.com/w/page/47329176/Public%20library%20salaries.
- ***Library Journal* annual salary survey**: Posted annually on their website and published in the print version. lj.libraryjournal.com/

You may also wish to consult the book **Developing a compensation plan for your library** by Paula M. Singer and Laura L. Francisco (Chicago : American Library Association, 2009). This book is available to you through WSL at wyld.sdp.sirsi.net/client/wsl.

Wyoming Retirement System (WRS)

The Wyoming Retirement System is a benefit program for public employees in Wyoming. Nearly all public employees, excluding federal workers, are eligible to participate in the WRS. The employer and employee each pay a contribution, but your library may elect to pay part or all of the employee contribution as part of your compensation package.

This excellent retirement program is a highly recommended option for any public agency in Wyoming. See retirement.state.wy.us for further information on the system. According to the most recent benefits survey conducted by WSL, most Wyoming public libraries participate in the Wyoming Retirement System.

Employment Tax Laws

- **Income Tax Withholding**
  Wyoming does not have a state income tax. Federal income tax collection is managed by the Internal Revenue Service. Website access to forms and tax questions are at www.irs.gov.
- **Federal Insurance Contributions Act (FICA)**
  www.irs.gov/taxtopics/tc751.html
  FICA is an employment tax that pays for retirement benefits. Retirement income is financed by the Social Security portion of FICA; hospital insurance is financed by the Medicare portion. Employees' wages are subject to FICA regardless of age or retirement status. Employers withhold employees' share of FICA taxes from paychecks and then pay a matching amount. Refer to IRS Publication 15, Circular E, Employer's Tax Guide, at www.irs.gov/pub/irs-pdf/p15.pdf for information on the current social security and Medicare tax rates.
- **Unemployment tax**
  This tax provides unemployment benefits to workers who have lost their jobs through no fault of their own. Although county governments are exempt from federal unemployment tax, you may still need to pay state unemployment tax. Contact the Department of Workforce Services if you have questions or need assistance: wyomingworkforce.org/.
- **Worker's compensation**
  The Wyoming Worker's Compensation Act's intent is to "assure the quick and efficient delivery of indemnity and medical benefits to injured and disabled workers at a reasonable cost to the employers" (W.S. 27-14-101). Worker's compensation affords protections to both employee and employer in the event of an injury. Contact the Department of Workforce Services with any questions: wyomingworkforce.org/.

Training

Training is a key component in the professional growth of a library director and the director's ability to cultivate good library service. Ideally, commitment to training will be a goal shared by both the library board and governing authority. Library budgets should contain specific line item funding for staff development

Your board should encourage you to participate in continuing education and professional organizations and allocate adequate funds for continuing education for the entire staff. Likewise, you will want to encourage your staff to participate in continuing education and professional organizations and allocate staff time for these activities.

Training opportunities

The library director should be aware of other free and affordable training and learning opportunities. Here are some resources you should be aware of

Wyoming State Library Offerings

Remember always that the Wyoming State Library is always there to help. The WSL Library Development Office is a good place to start any time you have questions about accessing training (will.state.wy.us/ldo/):

- **Training calendar:** A listing of free webinars on relevant topics from across the country. www.wyominglibraries.org/calendar.html
- **Monthly email updates:** Subscribe to the all@will and all@wyla listservs to receive a monthly email outlining upcoming offerings listed on the training calendar.
- **Live webinars:** The State Library produces regular webinars on the GoWYLD databases and other topics. These are included in the calendar and listserv updates. You may attend these live, or find them in the webinar archive afterward.
- **Webinar archive:** Past webinars are listed at will.state.wy.us/ldo/webinararchive.html. All webinars are posted to the YouTube channel at www.youtube.com/user/wyomingstatelibrary.
- **Video series:** Pre-recorded collections of videos on specific topics to get you started. These include:
    - *Trustee Trouble* – short videos primarily for your board members, but they also offer good information on the board-director relationship: www.wyominglibraries.org/trusteetrouble.html.
    - *Discover it, Try it, Learn it* – These focus on the GOWYLD databases. Play the videos (Discover it), do the exercises (Try it) and utilize the resources (Learn it) to

help patrons, train staff, work with students, and to enhance your own research: discoveritwy.wordpress.com/.
    - *Get on the Bus* – in past years, the State Library has done live training series via webinar on specific topics such as reader's advisory, reference and social networking. Find links to the videos and related materials at will.state.wy.us/ldo/webinararchive.html#Bus.
- **Professional collection:** Library science books on many practical topics available to you through interlibrary loan: will.state.wy.us/ldo/newpubs.html.
- **Publications:** *News to Use, Foundations* and the board members' handbook also have solid information for directors. Keep abreast of updates by following the *Outrider:* will.state.wy.us/slpub/.
- **Personalized training:** Have a specific need not addressed here? The State Library can often put together sessions, delivered via webinar, on specific topics. Contact the Library Development Office for general topics and the GoWYLD databases or the WYLD Office for WorkFlows and WYLDCat issues. Or, WSL staff may be able to find you additional resources on your topic of interest.

Wyoming Library Leadership Institute

The Library Leadership Institute exists to provide opportunities for learning, mentoring and developing leadership skills to promote the personal and professional growth of the Wyoming library community. The institute is a tool for nurturing both degreed and non-degreed individuals in leadership roles. It is not a workshop on becoming a library director or a workshop on library administration. www-wsl.state.wy.us/training/wlli.html

The Mountain Plains Library Association also offers a leadership institute that many Wyoming library workers have attended. www.mpla.us/leadership/

Wyoming Library Association conference

Each fall the Wyoming Library Association puts together an annual conference full of valuable workshop sessions and opportunities to network with your colleagues from across the state. When conference information becomes available, it is posted at www.wyla.org/annual-conference.

Local Government Liability Pool

Many Wyoming libraries are insured through the Local Government Liability Pool, either directly or through their respective county governments. The LGLP also offers consulting services and training modules that can help you reduce your risks by developing a more complete loss control program. Learn more under Loss Control/Prevention on the LGLP website at www.lglpwyoming.org/.

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 should have a job evaluation by his/her immediate supervisor once a year. When you are conducting a job evaluation, you are not evaluating the person; you are evaluating how well s/he does 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 an interview between the supervisor and the employee about the written evaluation. This interview 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 her/ his 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

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 his/her 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. S/he is 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 and should follow those procedures when conflicts arise. 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.

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.

Personnel overview from New Library Directors Handbook, Montana State Library

Personnel Management Reading List

Personnel management is a complex subject, and WSL has many titles in its collection on this topic. These titles are held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog at wyld.sdp.sirsi.net/client/wsl.

- **Be a Great Boss: One Year to Success**. Hakala-Ausperk, Catherine. Chicago: American Library Association, 2011.
- **Build a Great Team: One Year to Success!** Hakala-Ausperk, Catherine. Chicago : ALA Editions, an imprint of the American Library Association, 2013.
- **Coaching in the Library: A Management Strategy for Achieving Excellence 2nd ed.** Metz, Ruth F. Chicago American Library Association, 2011.
- **Crash Course in Library Supervision: Meeting the Key Players.** Tucker, Dennis C. Westport, Conn.: Libraries Unlimited, 2008.
- **Developing Library Leaders: A How-to-Do-It Manual for Coaching, Team Building, and Mentoring Library Staff.** Stueart, Robert D. New York : Neal-Schuman Publishers, c2010.
- **Fundamentals of Library Supervision.** Giesecke, Joan. Chicago : American Library Association, 2010.
- **Human Resources for Results: The Right Person for the Right Job.** Goodrich, Jeanne. Chicago : American Library Association, 2007.
- **Learn Library Management, 2nd ed.** Pymm, Bob and Damon D. Hickey. Friendswood, Tex.: TotalRecall Publications, c2007.
- **Managing Library Employees: A How-to-Do-It Manual**. Stanley, Mary J. New York : Neal-Schuman Publishers, c2008.
- **Staff development: A Practical Guide,4th ed**. Prepared by the Staff Development Committee, Human Resources Section, Library Administration and Management Association ; edited by Andrea Wigbels Stewart, Carlette Washington-Hoagland, and Carol T. Zsulya. Chicago : American Library Association, 2013.
- **Succession planning in the library : developing leaders, managing change.** Singer, Paula M. Griffith, Gail. Chicago : American Library Association, 2010.

Budgets

Wyoming county libraries receive the vast majority of their operating budget funding from local governmental sources, primarily county government. Most libraries are assigned mill funds, while other library budgets come from the general fund. If the library receives mills they will also receive auto license fees based on the percentage of total mills levied. A smaller amount comes from "other" income that includes library fines and fees, interest and fundraising. Wyoming libraries typically receive little to no direct state or federal funding. The library annual reports and budget surveys at will.state.wy.us/statistics provide information on funding levels.

Special districts such as Water and Sewer District, Museum District, Cemetery District and Downtown Development Authority are created by the voters with separate mill levy taxation. There is no Wyoming statute enabling libraries to establish a special district either within the county or with neighboring counties.

The timetable for designing your library's budget is really a year-round process. Even before putting numbers on paper, the board and director need to review the value of various services, look at appropriate efficiencies and discuss the effects of emerging community and technology changes. The director will be able to present a justifiable and responsible budget to the board considering existing costs, fixed costs, salary adjustments and new initiatives. It is the board's job to advocate for adequate funding to the county commission.

Budgeting Process

The budgeting process includes the following steps:

- Define the library's goals for the upcoming year based on the library's long-range plan.
- Gather information to project costs of providing services and meeting the year's goals.
- Estimate potential income from taxes, gifts, fines, fees, grants and any other possible source of income.
- Compare costs and income to see if all the goals can be met. If income exceeds or equals costs, the budgeting process continues.
- Adjust objectives if funding doesn't cover goals, or search for additional funding.
- Present the written budget to your board. If the board approves, present it to the funding body.

You and your library board work on the budget together, but ultimately, the library board is responsible for its approval and will present it to the county commission.

Budget Categories

Your library will expend funds in the following broad categories:

- Personnel and benefits – The bulk of your operating budget will be spent here. On average, Wyoming libraries spend 70-75% of their budgets on personnel, although this can vary significantly from county to county. Good staffing is critical to maintain high levels of service to your patrons. Salaries and benefits need to be competitive.
- Collection purchases and maintenance – This is typically the smallest chunk of a library's budget and often the one that suffers the most in a crunch. Wyoming libraries do enjoy support for electronic resources through the state-funded GoWYLD databases and frequently use interlibrary loan to fulfill patrons' needs.
- Other operating expenditures – this is a catchall that includes all other items from janitorial supplies to computer upgrades.
- Capital construction and improvements – these are funds for major renovations and construction that are not part of your normal operating budget

Developing a Budget

Directors should be attentive to many factors when developing a budget. The director should:

- Study the present budget
- Review past budgets
- Review past cash flow patterns
- Analyze strategic plan documents
- Analyze the library's technology plan
- Consult the library's salary schedule and account for any planned changes in wages and salaries
- Contact the local utility company for an estimate of what utilities will cost in the following year
- Consider if there are any known upcoming rate increases in postage, etc.
- Contact the County Assessor or Budget Officer for a prediction of the county valuation and for indication of 5th or 6th penny tax collection rates
- Contact the County Assessor to determine any unusual circumstances which may affect revenue including any large taxpayers with taxes under protest
- Determine if the Workers Compensation rate is changing for government employees
- If your library participates in the Wyoming Retirement System, determine if there have been any changes to the employer portion
- Ask providers if rate changes are expected for employee medical and dental insurance

- Ask about the minimum wage for the upcoming year
- Use Circular E, found at www.irs.gov/pub/irs-pdf/p15.pdf, to determine if any changes are expected in federal employment taxes (e.g. FICA)
- Discuss board expectation or interest in changing the fine and fee rates charged by the library
- Identify what library meetings and training opportunities will occur that might impact the calendar for budget planning
- Analyze interest rates, fees, fundraising or any other non-governmental funding
- Identify resource sharing initiatives that might impact equipment, travel and training sections of the budget
- Review equipment priorities, eg. routinely replacing some computers every year

Most of all remember that a budget is flexible, but you must operate within the bottom line.

Submitting the Budget

By WS 16-4-104, the preliminary library budget is to be handed to the county clerk's office on or before May 1. As in any planning activity, it is important to establish a schedule. 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.

Uniform Municipal Fiscal Procedures Act

By Wyoming Statute 16-4-101 et seq., local governments are required to develop, submit and manage budgets within defined parameters and using generally accepted accounting practices. The library budget must conform to the Act by following the hearing, adoption, transfer, purchasing and audit requirements. You should familiarize yourself with the full text of the Uniform Municipal Fiscal Procedures act before embarking on the budget process and refer any specific questions to your library's legal counsel. The text is available in *Wyoming Library Laws* (will.state.wy.us/slpub/LibLaws.pdf.) County government practices may vary, so the director and board should become aware of any local variations related to this Act.

Bonding

Bonding is an insurance agreement pledging a guarantee for financial loss caused by the act of default of a person or by some contingency. The library board treasurer, library director, and

office manager or bookkeeper are members of the organization who should be bonded. A bonded representative of the library is the only person associated with the library who should handle the funds received from the county treasurer. Some county treasurers deposit payments directly to the library's bank account. The library board annually pays for the bond out of the library budget and the county treasurer holds the bond. Generally taxes are released to the various county entities including the library board between the 1st and the 10th of each month but directors should find out from their county treasurer how they release these and fifth and sixth cent funds.

Time Frames

Calendar Year
January 1 through December 31

Tax Year
January 1 through December 31

Tax year may vary for the fifth and sixth penny taxes, and is determined by the time of the successful election vote.

Fiscal Year
July 1 through June 30

County finances are audited annually (WS 16-4-121). The library is part of this audit. Generally the county pays the entire cost of the audit. However, this may vary from county to county. At the end of the fiscal year, make note of the number of days of accumulated vacation and sick leave available to each employee as of June 30. This information will be requested of the directors as part of the county audit. They will also need to supply their bank account balances, tax funds received in the treasurer's office that are not yet distributed to the library, as well as the amount of any outstanding bills.

Budget Year
Day-to-day accounting for the library is on a cash basis. Other accountings, including some operations at a county level, are modified accrual. When the county audit is performed, it is based on full accrual accounting according to WS 16-4-121 and 9-1-507.

If the cash method is used, income is counted when cash (or check) is actually received and expenses are counted when actually paid. Under the accrual method, transactions are counted when they happen regardless of when the money is actually received or paid. The most significant effect involves the tax year in which income and expense items will be counted.

Under the accrual method any expenses incurred or revenue earned will be counted during that tax year. With the cash basis, they would not be counted until actually paid or received. The accrual method is thought to give a more accurate picture of the entities finances. Both methods have their good and bad points.

If the library operates on a cash accounting system, income is accounted for when it is received. Tax receipts from the county treasurer are collected in one month, such as June, but the library will not actually receive those dollars until the treasurer issues a check in the next month, such as July. The library will account for the income as July income even though the tax dollars were received in the county in June, which was the previous fiscal year.

Again directors should find out what happens locally. The following are for illustrative purposes only:

With **accrual accounting** income and expenditures for the budget year generally fall into the time frame of early to mid-July to the same time the following year. Income claimed by the library during the early part of July is actually income from the preceding fiscal year. The bills paid by the library board in July are based on expenses incurred during June and technically are part of the budget of the preceding fiscal year.

With **cash accounting** income and expenditures for the budget year fall within the time frame of July 1 to June 30 and are accounted for when the income is actually received and the expenditure is actually made. The library will likely make financial commitments prior to the end of a fiscal year. These are generally for items ordered late in the fiscal year and not yet received and paid for by June 30. Some libraries may encumber these items and then show that commitment as a line item in the following year's budget. When the item is received, the expense is charged against that line item.

Who to Ask

Directors should contact officials in their county who are involved in finances such as the county commissioners, county assessor, county clerk, county treasurer, county budget officer and anyone else these individuals might recommend. Ways in which counties and libraries handle money vary, so directors will want to find out how it is done in their environment. Directors should also check to see if they are to forward the monthly library board minutes and financial report to anyone.

In addition to understanding what happens at the county level, directors also need to determine how the library board wants things done. The board approves the budget and the director administers the budget. The board should not micro-manage the implementation of

the budget. The director should learn from the board what their style is and what parameters they expect the director to operate within. They will find that the parameters will change as boards change. The director will want to periodically check to make sure that he or she and the board are on the same page in terms of implementing the budget.

Questions to Ask the County Clerk

- How many copies of the draft budget do you need by May 1?
- Which other county officials should also receive a copy of the draft budget?

Questions to Ask the County Assessor

- Are there any outstanding challenges to tax bills by industries or businesses in the county? If yes, how is that challenge affecting the county's valuation?
- Does the library receive any tax in escrow if a ruling favors the county?
- How is the county valuation broken down among industry, agriculture, residential and business?

Questions to Ask the County Treasurer

- What special districts exist in the county?
- Is the school district collecting one mill for a recreation district?
- Have the commissioners established a maximum millage or dollar amount for any agencies or the library?
- What taxes other than property tax does the library receive?
- How do revenue estimates generally compare with actual revenue?
- How does the library receive the tax funds due it?
- What are the dates for payments of various taxes to the library?
- Who at the library should be bonded?
- What steps are taken for the library to receive its revenue?
- What valuation figures are the commissioners using this year as they calculate the preliminary budget?

Revenue

The majority of the revenue for the operation of the library is generated by the levy from property valuation, which is determined by the assessor; the levy is set by the county commissioners. The funds are collected and dispersed by the county treasurer. County government can levy up to 12 mills of property tax with most counties operating by collecting the full 12 mills. The library is included in the 12-mill cap. Sources of revenue generated at the county level include taxes on real property, fees on motor vehicles, and other miscellaneous taxes, which will vary by county. See WS 39-13-104, Taxation Rate, for specific information on county taxes.

Other revenue is generated at the library level. This includes money collected from library patrons for fines, lost or damaged library materials and/or other fees instituted by the local library. Your friends of the library and library foundation may also provide substantial support through current fundraising or endowment earnings. The Wyoming Library Endowment Challenge (see discussion under "Wyoming Library Landscape") has allowed the state's public libraries to significantly increase their endowment funds.

Wyoming libraries typically receive little to no state or federal funding. Most state dollars used to support libraries are used for cooperative projects that benefit the entire Wyoming Library Community.

Property Taxes

Property taxes are computed on a January-December value with notices mailed out by the end of September. The county assessor prints the tax roll and the tax bills are printed and mailed by the county treasurer. Property taxes are collected and dispersed by the county treasurer.

Taxes paid in two installments are due on or before November 10 and on or before the following May 10. Taxes paid in one full payment are due on or before December 31. Property taxes include property taxes, delinquent taxes and veterans' exemption.

Components that affect the millage for the library:

- **Property Tax** – taxes paid on property.
- **Homestead Tax Credit** – credit against taxes. No current legislative appropriation for this exemption.
- **Veteran's Property Exemption** – credit against taxes if a veteran has served in specified conflicts.

- **Tax Delinquencies** – includes taxes which are paid late plus proportionate share of 18% interest.
- **Property Tax Relief** – discount on taxes for people of low income.

Motor Vehicle Fees

Motor vehicle fees (license fees) are computed on a calendar year. During the first nine months of the calendar year, the county's portion of these fees are held in an interest bearing account by the county treasurer until the mill levy for the current year is established. Distribution of these fees varies by county but generally occurs from September through December.

Directors should check with the county treasurer to see when they can expect to receive these funds. The library will receive its proportionate share of the county fees as well as its proportionate share of the interest on any held funds. The proportionate share is calculated on the percentage of the mills the library receives in proportion to the total mills collected, including mills for the schools, county, cities, special districts, etc.

Components affecting license revenues:

- Veteran's Motor Vehicle Registration Exemption
- Motor Vehicle Registration Fees – fees paid to license vehicles
- Motor Vehicle Proportional Fees – commercial carrier fees paid to the state

Miscellaneous Taxes

Directors can contact the County Treasurer to determine if these taxes are collected in the county and what the library's share might be:

- "5th penny" sales and use tax – local sales tax for general revenue
- "6th penny" sales and use tax – local sales tax intended for a specific purpose, such as a new building or facilities renovation
- Car Company – taxes the railroad pays on their rail cars
- Mobile Machine – registration tax or fee on heavy equipment brought into the county

Both 5th and 6th penny sales taxes must be approved by voters.

Public Recreation and Playgrounds

Under WS 18-9-201 some school districts pass a 1-mill levy for recreation and some libraries have worked with school districts to receive part of these funds. If the mill is collected and the library does not receive any funds, directors might want to work with the school district to see if they will provide some support for activities such as summer reading, materials to support school curriculum, etc.

State and Federal Revenue

In Wyoming, public libraries typically receive almost no state or federal revenue. The State of Wyoming supports libraries primarily through cooperative products and shared resources; it does not offer any direct state aid. State or federal dollars typically come through grants, such as those from the Wyoming Arts Council.

Non-Governmental Revenue

When you complete your annual report, you will find a line for "other" income. This is a catch-all for patron fines and fees, interest, cash donations (not in-kind), private foundation grants – anything that does not come from a governmental entity. Libraries' dependence on other income varies widely. In recent years, some Wyoming libraries have come to depend more on cash from their foundations' endowments. Because this involves a transfer of funds from the foundation, which is a separate legal entity, money received for current programs and projects from the library endowment is considered revenue. Many libraries have now built significant endowments, in part thanks to the Wyoming Library Endowment Challenge.

Following the Money

The approved budget is authority to spend. It is important to remember that a budget is flexible, but you must operate within the bottom line. The director must also manage cash flow. Expenditures should be made only against realized revenues, as all revenue may not be received.

Your board has control over the library's expenditures. Although your 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.

You should provide your board with a monthly statement that shows at least the following:

- Monthly revenue
- Total revenue 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

When you and your board review the reports, look 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.

This is a good time to compare budget figures with actual amounts. Did you get the expected income? If not, you need to find out why and make adjustments in the budget if necessary. The board should be working with you on this one. Compare actual expenditures with budget amounts as well. Be prepared to explain discrepancies.

Adapted from New Library Directors Handbook, Montana State Library

Cash Flow

The amount of money available each month from the county treasurer for the library varies greatly. Directors should look at the pattern of income for the previous 12 months of their library. This will give an indication of the cash flow. Just because an amount is budgeted does not mean that library will receive that amount of money due to delinquent taxes, property tax relief and taxes under protest, as examples. A good rule of thumb is to not commit funds until the funds are in hand. Remember that a budget is a guideline and must be flexible to adapt to unforeseen changes.

Certificates of Indebtedness

Sometimes the library board will find they have no money available for the operation of the library. Certificates of Indebtedness are addressed in WS 18-3-402, 18-4-104 through 18-4-106. Per WS 18-4-104c, the total amount of certificates issued by a library board may not exceed 30% of the budget estimate of anticipated income for the year of issuance.

Resolution

The resolution is presented by the library director to the library board for approval at a board meeting. Following adoption of the resolution at the library board meeting, all library board members sign and date the resolution. The resolution is then presented by a representative designated by the library board, generally the director, to the county commissioners at their meeting. The commissioners will apply and date their signatures once the resolution has been adopted and noted in the minutes of their meeting. The county commissioners probably will keep the signed original.

Certificate

The library board will probably get a photocopy of the original resolution. That explains why the page titled "Certificate" is necessary. If the library is borrowing money from a bank, it will be necessary to provide the bank a copy of the resolution as well as the original "Certificate."

Certificate of Indebtedness

This page is used each month to document the amount of money borrowed and the date borrowed. To make the paper trail clear, it is a good idea to attach a list with check numbers, payable to whom and the amounts that add up to the amount of money borrowed. The library should keep copies of all the above documents.

"Distinguishable" Wording

The WS 18-4-104 f requires that bills paid with borrowed funds be clearly distinguishable from county orders or warrants. A simple way to accomplish this is to have a stamp made with the wording "I hereby certify that this warrant is within the legal debt limit and is issued according to law." Affix the stamp to the face of checks and/or vouchers used to pay bills with borrowed funds.

Loan Repayment

When the library is ready to pay off the loan, have a bank compute the interest. This places the responsibility for the accuracy of this information with the bank. It is a good idea to include a statement in the minutes of the library board meeting indicating what amount of interest is due on the loan, date when the interest is paid and name the bank and/or employee of the bank who calculated the interest.

If the library can initially arrange to borrow this money from its Library Foundation, the interest can then be paid to the Foundation rather than to a bank. Per WS 18-4-104c, “certificates of indebtedness shall bear interest at not more than six percent (6%) per annum payable from the funds of the board issuing the certificate.”

Realignment of Budget and Legal Notices

Directors may find it necessary to re-allocate or realign funds from one budget category to another or to increase the budget as the result of receiving unanticipated revenue. Changes in the budget may be made by the governing body through a resolution after publication of notice to realign the budget in a local paper. Generally changes in the budget occur during the second half of the fiscal year and most often in the last quarter of the fiscal year

Planning

It is hard to plan for the future when you're trying to simply keep up with today, but planning is worth the work. Planning looks at where you are and helps you decide where you're going.

Why bother planning? Libraries have always faced difficult and challenging times. Those that planned effectively survived and thrived; those that didn't are either gone or struggling to prove their value in today's society.

Strategic planning

What is a strategic plan?

- It is a road map or a series of directions to get from one place to a better place.
- It is a logical process that leads to change or improvement.
- It helps groups and individuals make better-informed decisions that result in responsible and productive actions.
- It increases the effectiveness of the organization and assures that the stated goals and objectives will be reached.
- It requires future oriented thinking, i.e., what do we want to happen, provide, or change in library facilities, services, or technology?

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

When library planners put down on paper the goals and objectives that the library hopes to accomplish over a specific period of time, they commit themselves to making it happen.

Strategic Plan Components

Your strategic plan should be a clear, readable and well-used document. A strategic plan format may vary, but it typically consists of:

- **Needs assessment –** determining the needs of the community through analysis.
- **Mission–** a statement of the library's purpose.
- **Vision –** a description of the desired future outcome for the library and its community.
- **Goals –** general statements about what you need to accomplish to fulfill your mission and achieve your vision. A good goal is SMART – Specific, Measurable, Achievable, Relevant and Time-limited.
- **Strategies –** approaches you will take to achieve your goals.
- **Action plan –** the who, what, where and when of tasks and timelines.

Questions to Ask

Planning involves answering basic questions, including:

- What does our community look like now?
- What do we want our community to be in the future?
- What is the role of the public library in the community?
- What is our purpose?
- Whom do we serve and what do our customers want from us?
- What does success look like for us?
- How will we get there and what is our timetable?
- What staff, collections, facilities, technology and other resources will we need to achieve our planned goals and objectives?

Some broader issues to consider as you plan are:

What should your library do?

Is there something that your library should be doing, but isn't? This is a good time to talk about library values. What are your values? Is it important that people have access to information? Should your library be a holding place for the history of your community? Should everything in the library be free? You must look at your community and determine those values that are important to you. Libraries have a special place in the community and common values are what bring us together to succeed at what we are doing.

What should your library not be doing?
Are there services that you are offering that you shouldn't be offering? Again look at your values as a library and look at your community.

How is your library going to allocate resources?
Resources are scarce in any library, so use what you have wisely.

Planning section adapted from Manual for New Directors of Public Libraries in Utah, 4th ed. and New Library Directors Handbook, Montana State Library.

Library Data

To answer many of these questions, you may need to look at library and community data. The Wyoming State Library offers resources to help. Good library and community data provides information useful for management, comparison and advocacy. Gathering data should be one of the steps in your planning process.

Links to state and national data on library services and demographics may be found on the Wyoming State Library website at will.state.wy.us/statistics/index.html. The state library also offers consulting and information services on surveys and data, including:

- **Local surveys**: Wyoming State Library staff can review and offer consulting on any local surveys you might be developing. We have a paid subscription to SurveyMonkey (www.surveymonkey.com) and can set up your survey in this useful online tool. Also see our LiveBinder of helpful survey resources at www.livebinders.com/play/play?id=1051691.
- **Data information services:** Need community or other data to set your strategic direction or make a case for your library? There are many data sources available – not just library data – that may be of value when planning for your library's future. If you have questions about where you might find a particular number, please contact the WSL Library Development Office

Learn more about Wyoming State Library data services in the appendices.

Strategic Planning Reading List

In the supplementary materials on the website you'll find the following recommended reading on strategic planning:

- **Chapter 5** of the *ACLB Public Library Trustee Handbook*, Prepared by the Association of Connecticut Library Boards, 2011 will.state.wy.us/ldo/boards/Board_HandbookCT.pdf.
- **Chapter 4** of *the Maryland Library Trustee's Manual 2009*, Division of Library Development & Services, Maryland State Department of Education will.state.wy.us/ldo/boards/Board_HandbookMD.pdf.
- **Chapter 7** of the *Utah Public Library Trustee Manual*, Utah State Library Division, 2011 will.state.wy.us/ldo/boards/Board_HandbookUT.pdf.

Many general titles are available on the topic of strategic planning. These library-specific books are held by the Wyoming State Library and available to you at the State Library or through interlibrary loan. Search the catalog for these at wyld.sdp.sirsi.net/client/wsl.

- **Crash course in strategic planning.** Matthews, Stephen A., author. Matthews, Kimberly D., author. Santa Barbara, California : Libraries Unlimited, 2013.
- **Strategic planning for results.** Nelson, Sandra S. Chicago : American Library Association, 2008.

Other Plans

In addition to your strategic plan, your library may have specific plans for facilities, technology, emergency/disaster management or public relations.

Disaster Planning

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

When preparing a disaster plan:

- Inventory the library and its contents, so you will know what is there.
- 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.

Keep in mind as well that the library may become a hub of activity if a disaster affects the wider community. In many cases, community residents flock to the library for information and computer access when a natural disaster has destroyed homes or left many without power. Disaster planning should account for the library's critical role in meeting this potential community need.

Adapted from New Library Directors Handbook, Montana State Library

Disaster Planning Reading List

These books are held by the Wyoming State Library and available to you at the State Library or through interlibrary loan. Search the catalog for these at wyld.sdp.sirsi.net/client/wsl.

- **Disaster response and planning for libraries**. Miriam B. Kahn. Chicago : American Library Association, 2012.
- **Disaster planning : a how-to-do-it manual for librarians with planning templates on CD-ROM**. Deborah D. Halsted, Richard P. Jasper, Felicia M. Little. New York : Neal-Schuman Publishers, c2005.

Technology Planning

Computers, copiers, etc. are often the most expensive items we have to purchase, which is why it's helpful to plan for technology. We think about evaluating our library services, staff, and ourselves but we don't always think about our equipment or our workflows. Sometimes we inherit a particular way of doing something without realizing that it's no longer necessary with the technology we have. The questions that follow cover both planning and evaluating:

What do you have?

Inventory the number of computers you have for staff and the public. What types of software

are on each of the computers? Do you have a copier? A fax machine? What type of Internet connection do you have?

Is it working correctly?
Do you have computers that are acting up? What about your copier? If you are starting to experience problems with your technology, it may be time to replace it. Like a car, technology equipment needs regular maintenance and sometimes it needs to be replaced.

How are we using the technology?
Are you using it effectively? Is there another place where it might be helpful? Are you getting the results you want? What would help you get those results? Do you need more training?

What do you need?
Do customers have to wait and wait for a computer to open up? Maybe you need to purchase another one. Is the copier not working correctly? Think about your needs and the needs of your customers when answering this question.

When will you need it?
If you plan effectively, you can implement a schedule for when to replace equipment or when to order new. This lets you match the money you spend with what you'll receive in a given year.

What obstacles will keep you from getting this technology?
Money is usually the biggest, but you should consider others. Even if you have the money to purchase a new computer, you still need a place to put it, and sufficient bandwidth to connect it to the internet.

From New Library Directors Handbook, Montana State Library

Technology Planning Reading List

These books are held by the Wyoming State Library and available to you at the State Library or through interlibrary loan. Search the catalog for these at wyld.sdp.sirsi.net/client/wsl.

- **The complete library technology planner : a guidebook with sample technology plans and RFPs on CD-ROM**. John M. Cohn, Ann L. Kelsey ; with a foreword by Keith Michael Fiels. New York : Neal-Schuman Publishers, c2010.
- **Technology for results : developing service-based plans**. Diane Mayo for the Public Library Association. Chicago : American Library Association, 2005.
- **Technology planning : preparing and updating a library technology plan**. Joseph R. Matthews. Westport, Conn. : Libraries Unlimited, 2004.

Facilities Planning

The need for new or expanded library facilities does not come often, but it should come as no surprise. Your library should have a long-range plan to ensure adequate and appropriate space for a growing population in a changing environment.

The location and attractiveness of the library building have a direct impact on library use. It is common wisdom that library facilities should be conveniently located, have ample parking, be aesthetically appealing, free of physical barriers, and large enough for the population served. But library buildings in the 21st century must also accept that in many cases, they are the *de facto* center for community-building. Not only do these buildings need flexible interior designs capable of accommodating present and future technologies, they need flexible spaces that can change as service delivery is re-invented.

The library should have a written plan for its facilities which includes population requirements, location guidelines, and parking. Also, the library should review periodically the community traffic patterns, identify other centers of community activity, and consider strategic alliances for targeted delivery of services. Finally, the library should periodically survey its patrons to measure their level of satisfaction with physical accessibility and convenience of its facilities.

Space Needs

In conjunction with the library's strategic plan, an assessment of space needs is highly advisable. Special consideration should be given to classrooms, meeting rooms and multi-function spaces available for public use after hours. Recognizing that the library is a center of community activity, co-location with other service agencies or retail spaces should be considered.

Parking

The library should have a firm understanding of parking availability for customers and whether it is adequate to meet the demand. It should provide an adequate number of parking spaces to meet ADA requirements and should ensure that parking spaces can easily accommodate the community's predominant size of vehicles. The library should also work with community transportation providers to encourage the availability of public transportation to the library.

Easy Identification

The library building must have visible signs that make it clearly identifiable from the street during daytime and evening hours. In addition, the hours of operation must be posted in a highly visible location. The library should use the international symbol for libraries and work with local agencies to install directional signs to the library in prominent locations.

Safety

The library facility must be free of physical barriers and conform to provisions of the Americans with Disabilities Act (ADA) as well as meet all federal, state, and local codes and requirements for buildings, fire and safety.

Checklist: Attractive and Functional

When assessing the library's attractiveness and functionality for the customer, consider:

- The outside of the building is well lighted
- The parking area and all entrances and exits are sufficiently lighted to provide safe entry and exit
- A way for users to return materials 24 hours a day
- Space for quiet reading and study
- Designated space for meetings, programs, and materials
- Adequate work space for staff
- Attractive and effective interior signage
- Appropriate electronic building security, smoke and fire alarms and security for collections
- Public address system
- Emergency lighting which meets local codes
- Up-to-date wiring to support the use of new technologies
- Appropriate furnishings for using technology
- A plan for maintaining the public investment in facilities that includes a schedule for refurbishing existing facilities, including repainting, carpeting, replacement of furniture, HVAC, equipment, etc.
- A general maintenance schedule and sufficient staff and/or contracted service to ensure safe, inviting, well-maintained facilities and grounds
- An inventory of library furnishings and equipment

Adapted from Manual for New Directors of Public Libraries in Utah, 4th ed.

Facilities Planning Reading List

A reputable resource for evaluating building space needs is published by the Wisconsin Department of Public Instruction called "Public Library Space Needs: A Planning Outline," which may be found at will.state.wy.us/ldo/boards/SpacePlanning.pdf.

These titles are held by the Wyoming State Library and available to you at the state library or through interlibrary loan. Search the catalog at wyld.sdp.sirsi.net/client/wsl.

- **Building Science 101: A Primer for Librarians** by Lynn M. Piotrowicz and Scott Osgood. Chicago: American Library Association, 2010.
- **Countdown to a New Library: Managing the Building Project, 2nd Ed.** by Jeannette Woodward. Chicago: American Library Association, 2010.
- **Designing Space for Children and Teens in Libraries and Public Places** by Sandra Feinberg and James R. Chicago: American Library Association, 2010.
- **The Library Renovation, Maintenance, and Construction Handbook** by Donald A. Barclay and Eric D. Scott. New York: Neal-Schuman Publishers, c2011.
- **Checklist of Library Building Design Considerations, 5th ed.** by William W. Sannwald. Chicago : American Library Association, 2009.
- **Managing Your Library Construction Project: A Step-By-Step Guide** by Richard C. McCarthy. Chicago: American Library Association, 2007.
- **Planning the Modern Public Library Building** by Gerard B. McCabe and James R. Kennedy, editors. Westport, Conn.: Libraries Unlimited, c2003.

Public Relations

The library director is often the spokesperson for the library and the person who coordinates public relations activities. However, all staff should be aware of their own impact on the library's image. Maintaining contact and cordial working relationships with local and regional media should be a shared responsibility of all staff, but it shouldn't stop there. This working relationship should be established with schools, community agencies, non-profit organizations, businesses and government officials from the library's service area. To strengthen the library's PR efforts, consider these ideas:

- Library board and staff should evaluate all policies and procedures in terms of their effect on the public and the library's public relations.
- Library staff is periodically trained in quality customer service.
- The organization is focused on public service and driven by patron needs.

- The library uses quality printing and production techniques in the preparation of all printed material and graphics.
- The name of the library or a graphical representation clearly identifiable with the library appears consistently on all library publications.

Your Library's Image

What do people see when they go to your 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 you don't have either of these then you can work on your publicity, programming, etc., but it won't make any difference. If people perceive the library in a negative light, nothing you do will bring them into the library.

So how can you develop a positive image and make the library inviting? One of the best ways is for library staff to practice excellent customer service skills. An inviting smile and a greeting when customers come in the door can make a huge difference in how people perceive the library. Customers who call deserve the same professional and positive experience as those who walk in the door.

Make sure library staff 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 your staff feel more confident and appear more professional and competent to your customers. The best form of advertising is word-of-mouth from satisfied customers to others.

Once you and your library staff have created a welcoming service environment, take a look at your library. Are there directional signs that make it easy for people to find what they are looking for? 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.

From New Library Directors Handbook, Montana State Library

Library Advocacy

Library advocacy goes a step beyond public relations. Advocacy is the process of pleading or arguing in favor of the public library. Library advocates play a critical role in communicating the importance of free and equitable access to information in a democratic society.

The effective library advocate:

- Maintains contact with elected officials
- Knows how to shape the message for legislators
- Knows who can get to decision makers
- Understands the importance of timing
- Writes effective communications
- Informs and educates
- Always says thank you

Who Can Be an Advocate?

Anyone who believes that libraries and librarians are vital in building an information literate nation is at heart an advocate. However, specific groups can be most effective when they speak about the library's impact upon their spheres of influence, for example:

- **Library Staff – Frontline Advocacy:** At the library and outside of work, library staff have numerous opportunities to engage neighbors, friends, and family in friendly conversations about how the library raises the quality of life in the community.
  What library staff can do: Be enthusiastic and positive. Thank library users for their business. Invite users to share their "library stories." Talk to neighbors about the library's mission and invite them to a special library event.

- **Library Trustees:** Often have political and community connections that can benefit the library. Also, public officials respect their charge to represent the best interest of the library and their community.
  What trustees can do: Stay informed about library issues regarding funding, censorship, Internet use and filtering. Get to know elected officials and maintain contact with them throughout the year. Accompany the library director to a public presentation. Use their connections on behalf of the library.

- **Library Users:** These stakeholders provide invaluable testimony about the difference library programs, collections, and services make in their daily lives.
  What library users can do: Provide testimony in support of the library at a budget hearing. Sign up to receive library news. Share with friends and family news about the library. Write letters to the editor in support of the library.

- **Friends of the Library:** As an independent community group of library champions, the Friends are often seen as passionate volunteers who tirelessly offer their labor to further the library's mission.
  What friends of the library can do: Stay informed about library events. Maintain contact with library administrators and trustees. Invite key people (e.g. city council members, business owners, community leaders) to be honorary friends. Write letters-to-the-editor in support of the library. Thank or recognize local legislators for their support.

- **Community Leaders:** Business owners, school principals and teachers, and community service providers can also speak on behalf of the library on the important economic, educational and social contribution to the community's welfare.
  What community leaders can do: Co-sponsor a library program. Offer to speak in support of the library at the next county commission meeting.

Delivering the Message

To be an effective library advocate you will need three things:

1. You need to communicate the key message simply and consistently.
2. You need to clearly define your audience by asking yourself "Who can help me achieve the library's goal?"
3. You need to identify what is the best way to reach your audience, e.g. a personal contact, by phone, by letter, via email, through the library's website, advertising in the media, press release, PSA, letter-to-the-editor, etc.

A worksheet to sketch out how you want to communicate your message is included in the appendices.

Dealing with the Media

The library must have a policy in place that deals with media calls and public relations. All library staff, trustees and friends should have a clear understanding of who can speak for the library. The designated spokesperson should have easy access to the library's key messages on various topics. Following are some tips if you are being interviewed:

- Be clear about who you represent.
- Know your message – you do not have to reinvent the message for every interview.
- Aim to deliver the key message at least three times.
- Know your audience – find out the type of publication, who the readers or listeners are; ask the reporter what the "angle" is.
- Be prepared to answer the standard "Who, What, Where, When, Why and How" questions.
- Write your key messages and talking points on notecards. Keep them in front of you when doing radio or telephone interviews.
- Talk in "sound bites." Your key message should be short and pithy.
- Don't be afraid to say, "I don't know." If you are not sure, say, "I'm sorry I don't know that. I'll be glad to check and get back to you."
- Help the reporter understand by providing fact sheets or background material.
- Practice, practice, practice.
- Remember to smile – remain professional but friendly and likable.
- Stay in control – Keep your answers focused and "on message." Don't let your guard down; this is an interview not a conversation. Nothing is "off the record."

Increasing Awareness in the Community

The wealth of library materials, programs, and services and the essential role libraries play in improving the quality of life should be conveyed on a continual basis through a sustained marketing and public relations program. Libraries should devote a portion of their annual budget to support activities that actively promote the library to the community, and the library's strategic plan must include public relations activities aimed at increasing the visibility and usage of the library. For example:

- Library staff regularly walk through the interior and the exterior of the library to assess the appearance and image it projects.
- The library identifies target groups to receive special library promotions.
- The library works with friends of the library, volunteers and other support groups to increase the library's visibility.

- The library has a plan to recognize significant contributions to the library.
- The library uses the following publicity techniques to promote and publicize library services on a regular basis:
    - Annual report to city council or county commission
    - Direct mail promotions
    - Electronic bulletin boards
    - Exhibits and displays (attractive and frequently changed)
    - General information brochures
    - Internet and the library's website
    - Newsletter
    - Newspaper articles, columns, ads
    - Outreach activities in the community
    - Participation in community events, fairs, parades, etc.
    - Posters, flyers, bibliographies, bookmarks, brochures
    - Presentations to community groups and organizations
    - TV and radio presentations and interviews

The library must have a sustainable advocacy plan that is implemented not only as a reaction in times of crisis or times of need. Build the relationships continually to advocate effectively.

Adapted from Manual for New Directors of Public Libraries in Utah, 4th ed.

Appendices

Acronyms & Jargon

- **@ your library** – the ALA Campaign for America's Libraries tagline.
- **ADA** – American with Disabilities Act
- **ALA** – American Library Association
- **ALTAFF** – Association of Library Trustees, Advocates, Friends and Foundations (Now United for Libraries)
- **ARSL** – Association for Rural and Small Libraries
- **CACQ** – Central Acquisitions Department of the Wyoming State Library
- **CIPA** – Children's Internet Protection Act: mandates use of filters in libraries receiving E-rate or IMLS funding to provide internet. www.ala.org/advocacy/advleg/federallegislation/cipa
- **Directors' Station** – SirsiDynix product that allows you to run detailed statistics from the ILS at http://ds.lib.wy.us/. Username and password required; contact the WYLD office.
- **E-rate** – Common name for the Schools and Libraries Program of the Universal Service Administrative Company (USAC) under the authority of the Federal Communications Commission (FCC). It can provide fiscal support to schools and libraries for eligible products and services that augment affordable telecommunications and Internet access.
- **FLSA** – Fair Labor Standards Act
- **FMLA** – Family and Medical Leave Act
- **FTE** – full-time equivalent: A measure to indicate the number of full-time employees who would be employed if all full-time and part-time positions were added together. For the purposes of library statistics in the annual reports, a full-time equivalent is set to a standard 40 hours per week.
- **FY** – Fiscal Year: Used in budgeting to identify the 12-month accounting period under which an organization operates. In Wyoming, the state fiscal year and the FY for all county libraries is July 1 to June 30.
- **GASB** – Governmental Accounting Standards Board
- **GoWYLD.net** – Wyoming's Information portal to knowledge and learning
- **ILL** – Interlibrary Loan
- **ILS** – Integrated Library System: Software that allows the library to use a single database to perform all functions for managing that library records, such as acquisitions, cataloging, circulation and serials management, and to provide online access to library records.
- **IMLS** – Institute of Museum and Library Services
- **ISBN** – International Standard Book Number

- **ISP** – Internet Service Provider
- **ISSN** – International Standard Serial Number
- **LAN** – Local area network
- **LDO** – Library Development Office, Wyoming State Library
- **LC** – Library of Congress
- **LSTA** – Library Services and Technology Act: a federal program administered by the Institute of Museum and Library Services. LSTA funds in Wyoming are administered by the Wyoming State Library, and the funds support many statewide initiatives
- **MARC** – machine readable cataloging
- **MLS** – Master of Library Science (also MLIS, MSLS): Graduate degree from a library school or department.
- **MPLA** – Mountain Plains Library Association
- **NCIPA** – Neighborhood Children's Internet Protection Act. See http://www.ala.org/offices/oif/ifissues/ncipa
- **OCLC** – Computer system used to catalog books and to access material in libraries around the world
- **OPAC** – On-line public access catalog
- **PLA** – Public Library Association: a division of the American Library Association
- **PLSC** – Public Library Statistics Cooperative
- **RFI** – Request for Information
- **RFP** – Request for Proposal(s)
- **SirsiDynix Symphony Workflows** – integrated library system (ILS) used to automate library functions for all Wyoming public and community college libraries, as well as many special and school libraries. SirsiDynix is the vendor; Symphony Workflows is the software.
- **SRP** – Summer Reading Program
- **SuDoc** – Superintendent of Documents. Classification system for federal publications.
- **United for Libraries** – see ALTAFF
- **VDX** – Virtual Document eXchange: software used for interlibrary loan (ILL) that is integrated into WYLDCat
- **WLA** – Wyoming Library Association
- **WLLI** – Wyoming Library Leadership Institute
- **WorkFlows** – Staff-side program for the SirsiDynix statewide ILS
- **WSL** – Wyoming State Library
- **WULP** – Wyoming Union List of Periodicals, a searchable resource for magazine and journal titles held in libraries across the state: http://will.state.wy.us/wulp/
- **WyDocs** – classification system for State of Wyoming publications

- **WYLD** – Wyoming Library Database, database of library materials in Wyoming libraries; also name of users group
- **WYLDCat** – Online catalog and access to magazine indexes and other databases

A detailed list of terminology and other acronyms can be found at the Online Dictionary for Library and Information Science. www.abc-clio.com/ODLIS/odlis_A.aspx

Director/Board Roles and Responsibilities

Tables from *Manual for New Directors of Public Libraries in Utah, 4th ed.* Utah State Library Division, Department Of Heritage And Arts, August 2013.

Governance

LIBRARY DIRECTOR	LIBRARY BOARD
Knows and observes local and state law for providing library service to the community. Supports library legislation.	Knows local and state laws affecting libraries and ensures that library services conform to Wyoming statutes. Proactively supports legislation on behalf of public libraries.
Understands own limits of authority with regard to the legal powers of the board and those of the local governing body.	Knows limits of the board's legal authority and understands where board powers lie in relation to those of the county commission.
Has direct responsibility for management of the library within the boundaries of board-approved policies, plan, and budget.	Has indirect responsibility for the administration and professional management of the library (i.e. does not run the library) by employing a qualified librarian to administer services and operations.
Attends all board meetings except where the director's performance is evaluated. Prepares and posts the meeting agenda for the public before the board convenes. Observes open meeting requirements.	Meets regularly and actively participates in board and other committee meetings. Ensures appointments are current. Holds open public meetings, except where executive sessions are allowed by law.
Regularly reports to the board, local government, and the public on the progress and needs of the library.	Ensures that accurate and complete minutes are kept for the public record, reviews and approves all meeting minutes and reports.
Follows local government regulations and policies scrupulously in library business matters.	Avoids any conflict of personal or business interests with those of the library, staff, or local governing officials.
Respects and carries out the decisions and actions taken by the board as a whole unit. Does not take sides with individual trustees.	Understands that the board functions as a single entity; no authority resides in an individual trustee.
Remains politically neutral in representing the library in the community and promotes intellectual freedom for all community residents.	Preserves the library's independence from undue political influence and any threats of censorship.

Policy Making

LIBRARY DIRECTOR	LIBRARY BOARD
Helps board comply with bylaws, suggests additions or changes that expedites board effectiveness. Provides assistance and relevant information about library operations, services, and resources to help the board develop equitable, comprehensive and effective policies.	Establishes, reviews and revises the bylaws to ensure smooth functioning of board and library operations. Responsible for establishing or recommending library service objectives and policies.
Administers library policies as adopted by the board and recommends additional policies as needed.	Participates actively in the policymaking process to support the library's mission in the community. Adopts written policies to support the library's purpose, goals, and objectives.
Regularly reports on the progress and effectiveness of implementing board approved policies.	Assesses and approves methods and schedule for implementing and reviewing library service policies.
Helps the board understand how government policies differ and interact with library services, resources, and operations policies.	Coordinates management, personnel, purchasing, contracting, EEO and ADA compliance, confidentiality of records policies with those of local, state and federal laws and regulations.
Submits preliminary collection development and materials selection policy for board approval. Selects all books and materials according to adopted policy. Can assign selection responsibilities to qualified staff.	Reviews and approves collection development and materials selection policy, which authorizes the director and qualified staff to select all books and other library materials.
Provides experience and expertise to help the board adopt the most appropriate library policies based on patron information and service demands.	Also reviews, revises and ratifies other written policies submitted by the library director addressing: reference services, gifts/donations; circulation and patron registration; operations and equipment use; use of library facilities by community organizations; public relations; Internet access; and staff training.
Supports and defends the intellectual freedom rights of all residents. Promotes the Library Bill of Rights and the ALA Freedom to Read statement.	Ensures that library policy states and supports the intellectual freedom of all residents in the community, including the Library Bill of Rights and the ALA Freedom to Read statement and provides a well-defined public challenge policy and procedure to protect the library and board from censorship threats.

Finances

LIBRARY DIRECTOR	LIBRARY BOARD
Understands sources of tax revenue for library operations and expends library funds judiciously and completely in selecting materials and providing services.	Understands the categories and sources of tax revenues available for library needs and knows what the library's fair share should be.
Prepares the preliminary annual budget recommendations based on present and anticipated revenues. Relates budget needs to board's overall plan for library development.	Reviews the budget proposal prepared by the library director, approves the final document and presents and defends it before the governing body and general public.
Reports regularly on library expenditures and informs the board of future demands on the budget. Suggests ways to stretch the budget through cooperation with other libraries, new technology, state and federal grant programs, and corporate or private funding opportunities.	Is informed about the library's financial status and current and projected funding needs. Asserts community leadership in identifying and securing sufficient funding for library operations. Establishes fund raising task forces or committees with other members of the community to fund collections, services, or operations.
Communicates to government officials the judicious use of funds expended for library services and reports on various output and outcome measures for justifying additional funding.	Maintains good relations with local government that collects and distributes library funds.

Planning

LIBRARY DIRECTOR	LIBRARY BOARD
Coordinates the community needs assessment and engages the board in review of the library's mission statement.	Actively participates in determining community needs and reviews the library's mission statement.
Communicates strengths and weaknesses of library services to the board. Designs and recommends specific activities to accomplish library's goals and objectives.	Participates in developing a long-range plan for library improvement, including specific goals and objectives. Periodically evaluates progress in implementing the library plan and adjusts goals and objectives as needed.
Periodically reports to board library service output and outcome measures.	Understands the library service output measures and uses them to evaluate implementation of long-range plan.

Personnel

LIBRARY DIRECTOR	LIBRARY BOARD
Serves as the technical advisor to the board on all library operations and recommends and supervises employment of all staff.	Employs a qualified library director at a competitive salary.
Is familiar with county personnel practices and policies as applicable. Is familiar with local, state, and federal employment laws and practices. Responsible for ensuring staff job descriptions are up-to-date. Conducts staff performance evaluations on schedule.	Sets personnel policy. Is aware of policies and practices covering library personnel (e.g. job descriptions, responsibilities, salaries, benefits, hours, sick leave, vacation, overtime, holidays, hiring and firing conditions, performance evaluation and promotion, professional development, etc.). Also knowledgeable about local, state, and federal employment laws. Evaluates the director periodically.
Communicates efforts and accomplishments of staff and suggests appropriate recognition and incentive awards. Conducts annual performance appraisals, maintains evaluation records, documents achievements or problems for governing authority. Recommends needed improvements in working conditions, compensation and benefits.	Ensures that the library director has sufficient and adequately compensated qualified staff. Responsible for providing healthy and safe working conditions and environment for director and staff or recommending improvements to local governing body.
Supports staff members in their duties and assignments and encourages their ideas, creativity, and constructive recommendations for providing library services.	Maintains cordial relations with library staff, but does not interfere in working relations between the library director and staff. Does not ask for special library favors of staff members.

Continuing Education

LIBRARY DIRECTOR	LIBRARY BOARD
Informs the board of continuing education opportunities for all personnel and trustees.	Provides an annual budget for library personnel and trustees to attend library workshops, conferences, and meetings.
Collects and shares with the staff, the trustees, and the governing body important articles and information that impacts library services.	Faithfully reads and studies trustee materials and professional library literature.
Welcomes new trustees to their new role and participates in their orientation program. Takes them on a tour of the library, to meet the staff, and learn about the library's collection, services, and programs.	Ensures that all new trustees have a planned orientation session to introduce them to their new position, board, colleagues, library personnel and the library itself.

Public Relations

LIBRARY DIRECTOR	LIBRARY BOARD
Maintains, coordinates and promotes board approved public relations programs.	Establishes, promotes, and participates in a planned program of public relations on behalf of the library.
Regularly promotes books, materials, services, and programs to the board, government officials, and the general public through the media and in person at community events. Likewise, informs the board of library needs and problems for their consideration and action.	Promotes the services, resources, and programs of the library at all professional, educational, civic, and social functions. Uses every opportunity to relate the benefits of excellent public library service to the community.
Interprets board public relations' policies to staff and encourages them to promote the library in community activities.	Maintains important and influential contacts in the community and keeps them informed of the library's progress and critical needs.
Works to keep the board and staff informed about important issues in the state and the national arena. Encourages the board to read professional library literature.	Remains current with state and national library issues, standards, and trends. Is responsible for educating the public and governing body of the above.
Supports board policies, decisions, and actions in the community.	Publicly defends library policies and supports actions by the director and staff executed according to board policy.

A Policy List for Public Libraries

From the Montana State Library Trustee Handbook

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

I. Mission and Role Statement
II. Board Bylaws
III. Public Service Policies
    a. Eligibility for borrowing and services
        i. Resident and nonresident
        ii. Programming and outreach
    b. Collection Management Policy
        i. Mission and goals with community description
        ii. Responsibility for selection
        iii. Selection criteria for each format
        iv. Scope and priorities of collection
        v. Selection procedures and vendor relations
        vi. Evaluation, weeding and maintenance
        vii. Censorship, access and challenged materials procedure
        viii. Intellectual Freedom Statement, Library Bill of Rights
        ix. Gifts and donations
    c. Circulation Policy
        i. Loan period and renewal
        ii. Confidentiality
        iii. Reserved material
        iv. Fines, damages
        v. Interlibrary loan
        vi. Special collections
        vii. Audiovisual equipment
        viii. Fees
    d. Reference Policy
    e. Facilities Policy
        i. Hours of operation
        ii. Americans with Disabilities Act compliance
        iii. Security
        iv. Meeting room use
        v. Exhibits and displays

        vi. Copiers and other equipment use
    f. Community Relations Policy
        i. Cooperative borrowing agreements
        ii. Relations with schools
        iii. Volunteers
        iv. Friends groups
    g. Patron Behavior Policy
        i. Unattended children
        ii. Respect for staff, users and library property
    h. Internet Use Policy

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

Wyoming Library Data Services

The Wyoming State Library is involved in many data collection projects where we ask public, school and academic libraries to provide us information.

Why do we do this? We want to provide Wyoming libraries with valuable tools for:

- Management
- Comparison
- Advocacy

This summary outlines what data we collect and why. It is not all-inclusive – from time to time, we may conduct special, one-time data collections. Links to state and national data on library services and demographics may be found on our website at will.state.wy.us/statistics/index.html.

Data Projects

Public Libraries: state-level surveys

All these state level surveys are requested from all 23 county library systems.

- **Annual reports**: The annual report collects information on budgets, collections, visits, circulation and other basic measures. Most of the information collected is standardized nationally and reported to the Public Library Statistics Cooperative (PLSC). The end result is a national database with numbers for more than 9,000 libraries. This allows us to see state and national trends, and the Institute of Museum and Library Services (IMLS) uses this data to perform more detailed analysis on library issues. Because this is a national project, you can use IMLS data tools (www.imls.gov/research/library_services.aspx) to find comparable libraries across the country. County libraries are required by Wyoming Statute to provide an annual report.

- **Budget survey**: After library budgets are approved for the fiscal year, the state library requests current and prior year approved budget figures, mills (where applicable) and local funding. On this survey, we also ask for comments on how budget changes may be affecting personnel or services, and if there are any local issues that are affecting the budget.

- **Salary survey**: Conducted every two years, this covers educational requirements and salary/wages for library positions from director to library page. Position descriptions are standardized as much as possible to allow for comparisons among libraries. This survey can provide valuable information as boards budget for employee compensation, particularly when paired with cost of living data from the Wyoming Economic Analysis Division (eadiv.state.wy.us/WCLI/Cost.html). Because detailed wage data can be personally identifiable, the state library only releases the full data to library directors and boards.

- **Benefits survey:** Every four years the state library collects information on what level of benefits are offered to library employees. Fringe benefits are an important part of a compensation package that will attract and retain good employees. This survey allows you to determine if your benefit package is comparable to other libraries in the state.

Public Libraries: National Projects

From time to time, the Wyoming State Library will work with researchers to promote national data collection efforts but not collect data directly. Often, these use samples, so not every Wyoming library is surveyed. National surveys are voluntary, but they can often benefit your library and the wider library community.

Wyoming School Library Survey

The Wyoming School Library Survey is conducted every year to gather basic measures of school library service. It is based on factors that research has correlated with higher test scores: the size of the school library staff; full-time/certified school librarians; frequency of library-centered instruction and collaborative instruction between school librarians and teachers; size or currency of library collections; licensed databases through a school library network; flexible scheduling; and school library spending.

The survey is paired with staffing and enrollment data from the Wyoming Department of Education. There are currently no national efforts to collect this type of data at the school level, so this survey is critical to assessing the state of Wyoming school libraries. This is especially pertinent, given that school libraries across the country have faced budget and staffing cuts in recent years.

Teacher-librarians have reported using this data to advocate for larger collection budgets. The data is also valuable to public library boards and other organizations when assessing their community needs.
will.state.wy.us/statistics/Schools/WYschoolsurvey.html

Academic Libraries – the Academic Library Survey

Every two years the Academic Libraries Survey (ALS) collects data on about 3,900 academic libraries and produces descriptive statistics on budgets, collections, student services and other measures. The Wyoming State Library does not collect this data directly, but it does promote the survey and provide assistance to libraries where appropriate. Collection of these data over time will enable the nation to plan effectively for the development and use of postsecondary education library resources. nces.ed.gov/surveys/libraries/Academic.asp

Data information Services and Consulting

We also offer consulting and information services on surveys and data.

- **Local surveys**: Wyoming State Library staff can review and offer consulting on any local surveys you might be developing. We have a paid subscription to SurveyMonkey (www.surveymonkey.com) and can set up your survey in this useful online tool. Also see our LiveBinder of helpful survey resources at www.livebinders.com/play/play?id=1051691.
- **Data information services:** Need community or other data to set your strategic direction or make a case for your library? There are many data sources available – not just library data – that may be of value when planning for your library's future. If you have questions about where you might find a particular number, please contact us.

Contact Us

If you have questions or would like more information, please contact the Library Development Office: will.state.wy.us/ldo/index.html

ALA policies

Library Bill of Rights

The American Library Association affirms that all libraries are forums for information and ideas, and that the following basic policies should guide their services.

I. Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.
II. Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.
III. Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.
IV. Libraries should cooperate with all persons and groups concerned with resisting abridgment of free expression and free access to ideas.
V. A person's right to use a library should not be denied or abridged because of origin, age, background, or views.
VI. Libraries which make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use.

Adopted June 18, 1948, Amended February 2, 1961, and January 23, 1980, inclusion of "age" reaffirmed January 23, 1996, by the ALA Council.

Free Access to Libraries for Minors: An Interpretation of the Library Bill of Rights

Library policies and procedures that effectively deny minors equal and equitable access to all library resources available to other users violate the Library Bill of Rights. The American Library Association opposes all attempts to restrict access to library services, materials, and facilities based on the age of library users.

Article V of the Library Bill of Rights states, "A person's right to use a library should not be denied or abridged because of origin, age, background, or views." The "right to use a library" includes free access to, and unrestricted use of, all the services, materials, and facilities the library has to offer. Every restriction on access to, and use of, library resources, based solely on

the chronological age, educational level, literacy skills, or legal emancipation of users violates Article V.

Libraries are charged with the mission of developing resources to meet the diverse information needs and interests of the communities they serve. Services, materials, and facilities that fulfill the needs and interests of library users at different stages in their personal development are a necessary part of library resources. The needs and interests of each library user, and resources appropriate to meet those needs and interests, must be determined on an individual basis. Librarians cannot predict what resources will best fulfill the needs and interests of any individual user based on a single criterion such as chronological age, educational level, literacy skills, or legal emancipation.

Libraries should not limit the selection and development of library resources simply because minors will have access to them. Institutional self-censorship diminishes the credibility of the library in the community, and restricts access for all library users.

Children and young adults unquestionably possess First Amendment rights, including the right to receive information in the library. Constitutionally protected speech cannot be suppressed solely to protect children or young adults from ideas or images a legislative body believes to be unsuitable for them. Librarians and library governing bodies should not resort to age restrictions in an effort to avoid actual or anticipated objections, because only a court of law can determine whether material is not constitutionally protected.

The mission, goals, and objectives of libraries cannot authorize librarians or library governing bodies to assume, abrogate, or overrule the rights and responsibilities of parents. As "Libraries: An American Value" states, "We affirm the responsibility and the right of all parents and guardians to guide their own children's use of the library and its resources and services." Librarians and governing bodies should maintain that parents—and only parents—have the right and the responsibility to restrict the access of their children—and only their children—to library resources. Parents who do not want their children to have access to certain library services, materials, or facilities should so advise their children. Librarians and library governing bodies cannot assume the role of parents or the functions of parental authority in the private relationship between parent and child.

Lack of access to information can be harmful to minors. Librarians and library governing bodies have a public and professional obligation to ensure that all members of the community they serve have free, equal, and equitable access to the entire range of library resources regardless of content, approach, format, or amount of detail. This principle of library service applies equally to all users, minors as well as adults. Librarians and library governing bodies must uphold this principle in order to provide adequate and effective service to minors.

Freedom to Read

Read the full statement at
http://www.ala.org/advocacy/intfreedom/statementspols/freedomreadstatement

The freedom to read is guaranteed by the Constitution. Those with faith in free people will stand firm on these constitutional guarantees of essential rights and will exercise the responsibilities that accompany these rights.

We therefore affirm these propositions:

1. *It is in the public interest for publishers and librarians to make available the widest diversity of views and expressions, including those that are unorthodox, unpopular, or considered dangerous by the majority.*

   Creative thought is by definition new, and what is new is different. The bearer of every new thought is a rebel until that idea is refined and tested. Totalitarian systems attempt to maintain themselves in power by the ruthless suppression of any concept that challenges the established orthodoxy. The power of a democratic system to adapt to change is vastly strengthened by the freedom of its citizens to choose widely from among conflicting opinions offered freely to them. To stifle every nonconformist idea at birth would mark the end of the democratic process. Furthermore, only through the constant activity of weighing and selecting can the democratic mind attain the strength demanded by times like these. We need to know not only what we believe but why we believe it.

2. *Publishers, librarians, and booksellers do not need to endorse every idea or presentation they make available. It would conflict with the public interest for them to establish their own political, moral, or aesthetic views as a standard for determining what should be published or circulated.*

   Publishers and librarians serve the educational process by helping to make available knowledge and ideas required for the growth of the mind and the increase of learning. They do not foster education by imposing as mentors the patterns of their own thought. The people should have the freedom to read and consider a broader range of ideas than those that may be held by any single librarian or publisher or government or church. It is wrong that what one can read should be confined to what another thinks proper.

3. *It is contrary to the public interest for publishers or librarians to bar access to writings on the basis of the personal history or political affiliations of the author.*

   No art or literature can flourish if it is to be measured by the political views or private lives of its creators. No society of free people can flourish that draws up lists of writers to whom it will not listen, whatever they may have to say.

4. *There is no place in our society for efforts to coerce the taste of others, to confine adults to the reading matter deemed suitable for adolescents, or to inhibit the efforts of writers to achieve artistic expression.*

   To some, much of modern expression is shocking. But is not much of life itself shocking? We cut off literature at the source if we prevent writers from dealing with the stuff of life. Parents and teachers have a responsibility to prepare the young to meet the diversity of experiences in life to which they will be exposed, as they have a responsibility to help them learn to think critically for themselves. These are affirmative responsibilities, not to be discharged simply by preventing them from reading works for which they are not yet prepared. In these matters values differ, and values cannot be legislated; nor can machinery be devised that will suit the demands of one group without limiting the freedom of others.

5. *It is not in the public interest to force a reader to accept the prejudgment of a label characterizing any expression or its author as subversive or dangerous.*

   The ideal of labeling presupposes the existence of individuals or groups with wisdom to determine by authority what is good or bad for others. It presupposes that individuals must be directed in making up their minds about the ideas they examine. But Americans do not need others to do their thinking for them.

6. *It is the responsibility of publishers and librarians, as guardians of the people's freedom to read, to contest encroachments upon that freedom by individuals or groups seeking to impose their own standards or tastes upon the community at large; and by the government whenever it seeks to reduce or deny public access to public information.*

   It is inevitable in the give and take of the democratic process that the political, the moral, or the aesthetic concepts of an individual or group will occasionally collide with those of another individual or group. In a free society individuals are free to determine for themselves what they wish to read, and each group is free to determine what it will

recommend to its freely associated members. But no group has the right to take the law into its own hands, and to impose its own concept of politics or morality upon other members of a democratic society. Freedom is no freedom if it is accorded only to the accepted and the inoffensive. Further, democratic societies are more safe, free, and creative when the free flow of public information is not restricted by governmental prerogative or self-censorship.

7. *It is the responsibility of publishers and librarians to give full meaning to the freedom to read by providing books that enrich the quality and diversity of thought and expression. By the exercise of this affirmative responsibility, they can demonstrate that the answer to a "bad" book is a good one, the answer to a "bad" idea is a good one.*

   The freedom to read is of little consequence when the reader cannot obtain matter fit for that reader's purpose. What is needed is not only the absence of restraint, but the positive provision of opportunity for the people to read the best that has been thought and said. Books are the major channel by which the intellectual inheritance is handed down, and the principal means of its testing and growth. The defense of the freedom to read requires of all publishers and librarians the utmost of their faculties, and deserves of all Americans the fullest of their support.

We state these propositions neither lightly nor as easy generalizations. We here stake out a lofty claim for the value of the written word. We do so because we believe that it is possessed of enormous variety and usefulness, worthy of cherishing and keeping free. We realize that the application of these propositions may mean the dissemination of ideas and manners of expression that are repugnant to many persons. We do not state these propositions in the comfortable belief that what people read is unimportant. We believe rather that what people read is deeply important; that ideas can be dangerous; but that the suppression of ideas is fatal to a democratic society. Freedom itself is a dangerous way of life, but it is ours.

This statement was originally issued in May of 1953 by the Westchester Conference of the American Library Association and the American Book Publishers Council, which in 1970 consolidated with the American Educational Publishers Institute to become the Association of American Publishers.

Adopted June 25, 1953, by the ALA Council and the AAP Freedom to Read Committee; amended January 28, 1972; January 16, 1991; July 12, 2000; June 30, 2004.

Freedom to View Statement

The FREEDOM TO VIEW, along with the freedom to speak, to hear, and to read, is protected by the First Amendment to the Constitution of the United States. In a free society, there is no place for censorship of any medium of expression. Therefore these principles are affirmed:

1. To provide the broadest access to film, video, and other audiovisual materials because they are a means for the communication of ideas. Liberty of circulation is essential to insure the constitutional guarantee of freedom of expression.
2. To protect the confidentiality of all individuals and institutions using film, video, and other audiovisual materials.
3. To provide film, video, and other audiovisual materials which represent a diversity of views and expression. Selection of a work does not constitute or imply agreement with or approval of the content.
4. To provide a diversity of viewpoints without the constraint of labeling or prejudging film, video, or other audiovisual materials on the basis of the moral, religious, or political beliefs of the producer or filmmaker or on the basis of controversial content.
5. To contest vigorously, by all lawful means, every encroachment upon the public's freedom to view.

This statement was originally drafted by the Freedom to View Committee of the American Film and Video Association (formerly the Educational Film Library Association) and was adopted by the AFVA Board of Directors in February 1979. This statement was updated and approved by the AFVA Board of Directors in 1989.

Endorsed January 10, 1990, by the ALA Council

ALA Policy on Confidentiality of Library Records

The Council of the American Library Association strongly recommends that the responsible officers of each library, cooperative system, and consortium in the United States:

Formally adopt a policy that specifically recognizes its circulation records and other records identifying the names of library users to be confidential. (See also ALA Code of Ethics, Article III, "We protect each library user's right to privacy and confidentiality with respect to information sought or received, and resources consulted, borrowed, acquired or transmitted" and Privacy: An Interpretation of the Library Bill of Rights.)

Advise all librarians and library employees that such records shall not be made available to any agency of state, federal, or local government except pursuant to such process, order or subpoena as may be authorized under the authority of, and pursuant to, federal, state, or local

law relating to civil, criminal, or administrative discovery procedures or legislative investigative power.

Resist the issuance of enforcement of any such process, order, or subpoena until such time as a proper showing of good cause has been made in a court of competent jurisdiction.1

Note: Point 3, above, means that upon receipt of such process, order, or subpoena, the library's officers will consult with their legal counsel to determine if such process, order, or subpoena is in proper form and if there is a showing of good cause for its issuance; if the process, order, or subpoena is not in proper form or if good cause has not been shown, they will insist that such defects be cured.

Adopted January 20, 1971, by the ALA Council; amended July 4, 1975; July 2, 1986.

ALA Policy Concerning Confidentiality of Personally Identifiable Information about Library Users

"In a library (physical or virtual), the right to privacy is the right to open inquiry without having the subject of one's interest examined or scrutinized by others. Confidentiality exists when a library is in possession of personally identifiable information about users and keeps that information private on their behalf" (Privacy: An Interpretation of the Library Bill of Rights).

The ethical responsibilities of librarians, as well as statutes in most states and the District of Columbia, protect the privacy of library users. Confidentiality extends to "information sought or received and resources consulted, borrowed, acquired or transmitted" (ALA Code of Ethics), and includes, but is not limited to, database search records, reference interviews, circulation records, interlibrary loan records and other personally identifiable uses of library materials, facilities, or services.

The First Amendment's guarantee of freedom of speech and of the press requires that the corresponding rights to hear what is spoken and read what is written be preserved, free from fear of government intrusion, intimidation, or reprisal. The American Library Association reaffirms its opposition to "any use of governmental prerogatives that lead to the intimidation of individuals or groups and discourages them from exercising the right of free expression as guaranteed by the First Amendment to the U.S. Constitution" and "encourages resistance to such abuse of governmental power . . ." (ALA Policy 53.4). In seeking access or in the pursuit of information, confidentiality is the primary means of providing the privacy that will free the individual from fear of intimidation or retaliation.

The American Library Association regularly receives reports of visits by agents of federal, state, and local law enforcement agencies to libraries, asking for personally identifiable information about library users. These visits, whether under the rubric of simply informing libraries of agency concerns or for some other reason, reflect an insensitivity to the legal and ethical bases for confidentiality, and the role it plays in the preservation of First Amendment rights, rights also extended to foreign nationals while in the United States. The government's interest in library use reflects a dangerous and fallacious equation of what a person reads with what that person believes or how that person is likely to behave. Such a presumption can and does threaten the freedom of access to information. It also is a threat to a crucial aspect of First Amendment rights: that freedom of speech and of the press include the freedom to hold, disseminate and receive unpopular, minority, extreme, or even dangerous ideas.

The American Library Association recognizes that law enforcement agencies and officers may occasionally believe that library records contain information that would be helpful to the investigation of criminal activity. The American judicial system provides the mechanism for seeking release of such confidential records: a court order, following a showing of good cause based on specific facts, by a court of competent jurisdiction. 1

The American Library Association also recognizes that, under limited circumstances, access to certain information might be restricted due to a legitimate national security concern. However, there has been no showing of a plausible probability that national security will be compromised by any use made of unclassified information available in libraries. Access to this unclassified information should be handled no differently than access to any other information. Therefore, libraries and librarians have a legal and ethical responsibility to protect the confidentiality of all library users, including foreign nationals.

Libraries are one of the great bulwarks of democracy. They are living embodiments of the First Amendment because their collections include voices of dissent as well as assent. Libraries are impartial resources providing information on all points of view, available to all persons regardless of origin, age, background, or views. The role of libraries as such a resource must not be compromised by an erosion of the privacy rights of library users.

Adopted July 2, 1991, by the ALA Council; amended June 30, 2004.

Volunteers

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

Volunteer Programs

- Enlist full board and staff cooperation. In order for the program to be successful, both your board and staff must believe in its value. If they do not, volunteers will pick up on this and will not remain at the library.
- Review with board and staff all library activities to see if a volunteer work program would be of help to the library in meeting goals and objectives. Sometimes you don't really need volunteers, while at other times (like during summer reading) volunteers are necessary. If you take the time to think about what your goals are, you can utilize volunteers more effectively.
- Assess activities and specific tasks to see where volunteer assistance could most properly be utilized. Take the time to plan what areas volunteers will work in and what they can do. This will save you time and frustration.
- Appoint a volunteer coordinator. If your library is small, you may be the coordinator. It is important that someone is responsible for working with the volunteers and making sure things are running smoothly.
- Prepare job descriptions for volunteer tasks. Just like a paid employee, it is important that volunteers know what is expected of them. A job description can also help you pinpoint what you need.
- Establish who will supervise each volunteer. In a small library this is pretty easy to do. Try to choose someone who is good at working with people and is comfortable with volunteers.
- Establish evaluation measures for continual feedback on volunteer job performance. Volunteers also like to know how they're doing. This doesn't have to be a formal process, but you should have something in place. It's important for you to keep track of how well the volunteer program is working.
- Prepare policy and procedure guidelines for volunteers. A well-written policy about volunteers and their use in the library will keep you focused.
- Develop orientation and training programs. It is important for volunteers to receive some type of orientation. An orientation to the library will make them feel more

comfortable. Training is necessary to make sure they perform their tasks correctly and it can also be a perk. Maybe the volunteer would like to learn more about searching the Internet and you are offering a class to your staff. By including the volunteer, you make them feel more a part of the library and reward them for their help.

- Plan formal recognition programs. Volunteers need to be recognized and appreciated. A formal program is a great way of publicly acknowledging their contributions. It's also important to recognize them informally. A simple thank you can go a long way.
- This one is optional, but can be an easy way to acknowledge the importance of your volunteers. Have your volunteers wear name tags. It adds a professional aspect to volunteering, and it's helpful for customers.

Recruiting Volunteers

- Think about why people volunteer. Maybe they would like to meet new people or want new challenges. Understanding a person's reason for volunteering can help you identify potential candidates and possible volunteer projects. Think outside of the normal volunteer routines. Many libraries ask volunteers to shelve and/or file. If people want to have more human contact in this time of computers and machines, asking someone to read at storytime may be the best way to enhance a volunteer's experience at the library.
- How can you recruit volunteers? You can do so by word of mouth. Talk with frequent library users and find out their interests.
- Ask your volunteers to let others know about volunteering activities. Put up flyers or posters that talk about what volunteers can do for the library. You can ask school clubs to do community service work in the library. The National Honor Society, Key Club,
- Business Professionals of America (BPA), etc. are required to do community service projects. Remember to be creative. Maybe you want to start a homebound program, where trusted volunteers will deliver books to those who cannot leave their homes. A great volunteer can organize this for you and supervise others in doing this.

Managing and Keeping Volunteers

- Clear communication is important. Volunteers and staff must work together and listen and learn from each other.
- Be sensitive to what the volunteer brings to the library. Each person has certain expectations, skills, and talents.

- Recognize volunteers and find ways to involve volunteers in supporting, stimulating, and recognizing each other.
- Work with volunteers to plan training and support. Volunteers can give you a good indication of where they need support and training.
- Be sensitive to the types of trainings or experiences the individual will best respond to and be selective and focused when providing that training. We all learn differently and respecting those differences can make the experience positive for both the library and the volunteer.
- Be alert for opportunities within a volunteer's assignment for offering experiences for growth and challenge. Volunteers like new challenges. They get tired of only filing or shelving books. If you sense a volunteer is becoming bored, try to find ways to make his/her job more interesting.
- Enable your volunteer to grow. Like staff, volunteers want to feel appreciated and that they have gained something from a position.
- In planning with a volunteer, allow for a loss of learning and momentum in part-time work. Volunteers have busy lives and other projects, so sometimes they may forget something or lose their drive.
- Ensure that volunteers understand library jargon and traditions. This is where orientation is important. You make volunteers feel like a part of the organization and they may find it easier to understand why you do something the way you do.
- Encourage initiative and experimentation. Volunteers bring new eyes to the library. If they think of a better way to do something or want to try a new project, listen carefully. The volunteer may be on to something that will improve the library. If they are, let them take the initiative in seeing something through.
- Make your volunteer feel welcome and as if they are a part of the library. You can do this by having a place for volunteers to store items, by offering a cup of coffee or tea when giving an orientation, and by talking to the volunteer about the role of the library.

From New Library Directors Handbook, Montana State Library.

Library Advocacy Message Worksheet

What is the ultimate goal of this library advocacy effort?

What are the immediate objectives?

What are the key messages (10-15 words)?

Who is the audience?

Why is this important to the audience?

1.

2.

3.

What do we want the audience to:

1. Think?

2. Feel?

3. Do?

Supporting points:

1.

2.

3.

How will we know if this advocacy effort is successful?

Reading List

The Wyoming State Library maintains a collection of books for professional librarians that cover all aspects of library management. These are available to you at the state library or through interlibrary loan. Search the catalog for these at wyld.sdp.sirsi.net/client/wsl.

Getting Started

- **What every library director should know**. Susan Carol Curzon. Lanham, Maryland : Rowman & Littlefield, [2014].
- **Library management 101 : a practical guide**. Edited by Diane L. Velasquez. Chicago : ALA Editions, an imprint of the American Library Association, 2013.
- **Library and information center management**. Barbara B. Moran, Robert D. Stueart, and Claudia J. Morner. Santa Barbara, California : Libraries Unlimited, [2013].
- **Crash course in public library administration**. Wayne Disher. Santa Barbara, Calif. : Libraries Unlimited, c2010.

Library Boards

- **The Successful Library Trustee Handbook**, Mary Y. Moore. Chicago : American Library Association, 2010. WSL collection –.
- **The Complete Library Trustee Handbook**, Sally Gardner Reed and Jillian Kalonick for the Association of Library Trustees, Advocates, Friends and Foundations. New York : Neal-Schuman Publishers, c2010.

Volunteers

- **Managing Library Volunteers**, Preston Driggers and Eileen Dumas. Chicago : American Library Association, 2011.
- **Teen Volunteer Services in Libraries**, Kellie M. Gillespie. Lanham, Md. : VOYA Books, 2004.

Patron Privacy

- **Privacy and Confidentiality Issues: a Guide for Libraries and their Lawyers**. Theresa Chmara. Chicago: American Library Association, 2009.
- **Law and Libraries: the Public Library**. Lee Ann Torrans. Westport, Conn.: Libraries Unlimited, 2004.
- **What Every Librarian Should Know about Electronic Privacy**. Jeannette Woodward. Westport, Conn.: Libraries Unlimited, 2007.

Intellectual Freedom

- **Intellectual Freedom Manual, 8th ed.,** compiled by the Office for Intellectual Freedom of the American Library Association, Chicago: The Association, 2010. Your public library

may have a copy of this book or one of its prior editions. If not, you may request it from the Wyoming State Library.

- **The new inquisition: understanding and managing intellectual freedom challenges** by James LaRue. Westport, Conn. : Libraries Unlimited, 2007.
- **Protecting intellectual freedom in your public library: scenarios from the front lines** by June Pinnell-Stephens for the Office for Intellectual Freedom. Chicago : American Library Association, 2012.
- **True stories of censorship battles in America's libraries** edited by Valerie Nye and Kathy Barco. Chicago : American Library Association, 2012.

Policies

- **The public library policy writer : a guidebook with model policies on CD-ROM** by Jeanette C. Larson and Herman L. Totten. New York : Neal-Schuman Publishers, c2008.

Personnel Management

- **Be a Great Boss: One Year to Success**. Hakala-Ausperk, Catherine. Chicago: American Library Association, 2011.
- **Build a Great Team: One Year to Success!** Hakala-Ausperk, Catherine. Chicago : ALA Editions, an imprint of the American Library Association, 2013.
- **Coaching in the Library: A Management Strategy for Achieving Excellence 2nd ed.** Metz, Ruth F. Chicago American Library Association, 2011.
- **Crash Course in Library Supervision: Meeting the Key Players.** Tucker, Dennis C. Westport, Conn.: Libraries Unlimited, 2008.
- **Developing Library Leaders: A How-to-Do-It Manual for Coaching, Team Building, and Mentoring Library Staff.** Stueart, Robert D. New York : Neal-Schuman Publishers, c2010.
- **Fundamentals of Library Supervision.** Giesecke, Joan. Chicago : American Library Association, 2010.
- **Human Resources for Results: The Right Person for the Right Job.** Goodrich, Jeanne. Chicago : American Library Association, 2007.
- **Learn Library Management, 2nd ed.** Pymm, Bob and Damon D. Hickey. Friendswood, Tex.: TotalRecall Publications, c2007.
- **Managing Library Employees: A How-to-Do-It Manual**. Stanley, Mary J. New York : Neal-Schuman Publishers, c2008.
- **Staff development: A Practical Guide,4th ed**. Prepared by the Staff Development Committee, Human Resources Section, Library Administration and Management Association ; edited by Andrea Wigbels Stewart, Carlette Washington-Hoagland, and Carol T. Zsulya. Chicago : American Library Association, 2013.

- **Succession planning in the library : developing leaders, managing change.** Singer, Paula M. Griffith, Gail. Chicago : American Library Association, 2010.

Facilities Planning

- **Building Science 101: A Primer for Librarians** by Lynn M. Piotrowicz and Scott Osgood. Chicago: American Library Association, 2010.
- **Countdown to a New Library: Managing the Building Project, 2nd Ed.** by Jeannette Woodward. Chicago: American Library Association, 2010.
- **Designing Space for Children and Teens in Libraries and Public Places** by Sandra Feinberg and James R. Chicago: American Library Association, 2010.
- **The Library Renovation, Maintenance, and Construction Handbook** by Donald A. Barclay and Eric D. Scott. New York: Neal-Schuman Publishers, c2011.
- **Checklist of Library Building Design Considerations, 5th ed.** by William W. Sannwald. Chicago : American Library Association, 2009.
- **Managing Your Library Construction Project: A Step-By-Step Guide** by Richard C. McCarthy. Chicago: American Library Association, 2007.
- **Planning the Modern Public Library Building** by Gerard B. McCabe and James R. Kennedy, editors. Westport, Conn.: Libraries Unlimited, c2003.

Strategic Planning

- **Crash course in strategic planning.** Matthews, Stephen A., author. Matthews, Kimberly D., author. Santa Barbara, California : Libraries Unlimited, 2013.
- **Strategic planning for results.** Nelson, Sandra S. Chicago : American Library Association, 2008.

Disaster Planning

- **Disaster response and planning for libraries**. Miriam B. Kahn. Chicago: American Library Association, 2012.
- **Disaster planning : a how-to-do-it manual for librarians with planning templates on CD-ROM**. Deborah D. Halsted, Richard P. Jasper, Felicia M. Little. New York : Neal-Schuman Publishers, c2005.

Technology Planning

- **The complete library technology planner : a guidebook with sample technology plans and RFPs on CD-ROM**. John M. Cohn, Ann L. Kelsey ; with a foreword by Keith Michael Fiels. New York : Neal-Schuman Publishers, c2010.
- **Technology for results : developing service-based plans**. Diane Mayo for the Public Library Association. Chicago : American Library Association, 2005.

- **Technology planning : preparing and updating a library technology plan**. Joseph R. Matthews. Westport, Conn. : Libraries Unlimited, 2004.