

Essential Public Library Standards Survey

Dear Public Library Director and Board Members,

This document includes all of the essential public library standards that you need to meet in order to receive state funding. We created this document to help you understand each standard and what it means. In the introduction of each section we explain why these standards are important and what, by meeting the standards, you will achieve in your libraries and communities.

You will see questions underneath the standards. The questions are designed to help you identify whether or not your library meets that standard. Each Montana library is unique so some of the questions may not apply to your library. If you have any questions or concerns about the standards themselves, or the survey process, please don't hesitate to contact Montana State Library staff. Thank you for working so hard to ensure that every Montanan has library services sufficient unto their needs.

Purpose of the standards

- Ensure that all Montanans and visitors receive library services sufficient unto their needs
- Give libraries direction in achieving the first purpose
- Help stakeholders understand the value and relevance of libraries

Library Board Meetings, Governance, Duties, Working with the Director

Board members have two primary responsibilities: to govern the library for the benefit of everybody in the community, and to help keep the Library and Board functioning effectively. Both tasks are equally important. Board members are part of a decision-making team that includes the rest of the library board and the library director. To function effectively, everyone needs a firm understanding of each other's different roles.

Our Intent: Library boards members and the Director work for the benefit of all Montanans

Desired outcomes: Board members and Directors

- are aware of community aspirations and needs
- work with community members to design services that help Montanans enrich and inform themselves
- work to develop the physical, financial, and social infrastructure that gives convenient access to sufficient library content and services

Essential Standards

1. The library is established per Title 7, Title 22, or through the legal process practiced by a Tribal Council. Mark this standard as met if you answer yes to ANY of the questions below.

Interpretive Question	Yes	No	N/A
Was your library created by a resolution of the town or city council or county commission?			
Was your library created by an interlocal agreement between a city or county or between a school district and a city or county?			
Was your library created as a library district by a vote of the people in your service area?			
Was your library created or officially acknowledged by a Tribal Council?			

2. The Board complies with Montana's Open Meeting Laws. Mark this standard as met if you answer yes to ALL of the questions below.

Interpretive Question	Yes	No	N/A
Are your board meetings announced and/or advertised where your community would expect to find the meetings announced at least 48 hours - and preferably a week - before they happen?			
Do your board meeting agendas list action items?			
Are your board meeting agendas posted where interested community members can see what the board will discuss and vote on?			
Is there time for public comment on your agenda and does the Board Chair invite members of the public to speak during those times?			
Does the Board take action only in a meeting that interested members of the public can attend?			

3. The library complies with the Secretary of State's guidelines for records retention. Mark this standard as met if you answer yes to ALL of the questions below.

Interpretive Question	Yes	No	N/A
Has the Director reviewed the records retention guidelines on the Secretary of State's website?			
Does the Director, with the support and assistance of board members, comply with those guidelines?			
Does the secretary for the Board take minutes of each meeting?			
Are those minutes kept permanently and available for anyone to review?			

4. While engaged in library matters, board members and the Library Director comply with local, state, and federal laws. Mark this standard as met if you answer yes to more than 50% of the questions below.

Interpretive Question	Yes	No	N/A
In the last 3-5 years, have the Director and Board reviewed the legal resources and/or handbooks from the Montana State Library? Or have you attended a workshop or webinar about laws you need to know?			
Do you have access to an attorney who can help you understand legal issues or can review legal documents for you?			
Do you work with your local government offices or someone with Human Resources expertise who can help you with the following personnel areas: hiring, evaluation, discipline, and termination?			

5. Board members learn about the library, the services it provides, and the role of the board in governing the library. This information is provided so that board members understand their roles in relation to the board chair, the library director, staff, and local government funding body. Mark this standard as met if you answer yes to more than 50% of the questions below.

Interpretive Question	Yes	No	N/A
Do new board members meet with the library director to learn about library services, take a tour of the library, and learn about what the board is currently working on?			
Do new board members receive a copy of Montana State Library resources that help the board member understand their role on the board and how that relates to the work of others?			
Does a current board member welcome the new board member and help them through the first few months of serving on the board?			
Does the Board receive training every 3-5 years about the role of the board, its members, and how the work of the Board relates to the work of the Director, staff, and local government?			

6. The Board meets at least 6 times a year.
7. The Board adopts bylaws and rules for its own transaction of business and for the government of the library, not inconsistent with law.
8. At least one board member attends at least one local government meeting annually.
9. At least one board member is certified by the Montana State Library.

10. The Board reviews the performance of the Library Director. Mark this standard as met if you answer yes to more than 50% of the questions below.

Interpretive Question	Yes	No	N/A
Do the Library Director and Board annually discuss what the Director will be working on in the future?			
Does the Library Director know what the Board expects of them?			
Does the Board have a process in place for giving feedback to the Director?			
Does the Director have a process in place for evaluating their work and reporting back to the Board?			

11. The Board annually evaluates its work. Mark this standard as met if you answer yes to more than 50% of the questions below.

Interpretive Question	Yes	No	N/A
Does the Board annually discuss what they will be working on in the future?			
Do board members know what is expected of them?			
Does the Board have a process in place for evaluating their work and making changes as needed?			

12. The Board and Director create and regularly review a mission statement for the library.

13. The Board and Director identify and discuss community needs and aspirations.

14. The Board and Director identify in writing what they want to accomplish in the next 3-5 years. Mark these standards as met if you answer YES to the first question AND yes to more than 50% of the remaining questions below.

Interpretive Question	Yes	No	N/A
Has the Board adopted a written plan that identifies what they want to accomplish in the next 3-5 years? (MANDATORY)			
Do the Board and Director review library and community statistics to identify trends?			
Do the Board and Director review qualitative data about the library and community to identify trends?			
Do the Board and Director use the above information to identify what to work on in the next 3-5 years?			

15. The Director or designee submits the Montana Public Library Annual Statistical Report to the Montana State Library. The Board and Director annually review public library statistics.

16. The Board and Director annually review progress on achieving the library's goals and mission. Mark these standards as met if you answer yes to ALL of the questions below.

Interpretive Question	Yes	No	N/A
Do the Board and Director review their annual library statistics to identify trends in funding, circulation, and/or other usage statistics?			
Do the Board and Director review their annual library statistics to identify how the library compares with peer libraries?			
Does the Director regularly update the Board on how the library is doing in achieving the goals and mission set by the Director and Board?			
Do the Board and Director annually review progress on the written plan and update it as needed?			

17. The Board adopts policies that reflect the mission and goals of the library. The policies govern use of the library, its materials, and services.

18. The Board reviews library policies to ensure efficient and safe operation of the library and for potential barriers to use. It reviews policies on a regular schedule set by the Board, but no single policy goes more than 4 years without review. Mark these standards as met if you answer yes to ALL of the questions below.

Interpretive Question	Yes	No	N/A
Does the library have policies that address use of the library and its resources?			
Does the Director regularly review policies based on staff input and/or their own experiences working with the public, especially when the policy seems to be creating a barrier to use of the library?			
Does the Director advise the Board when a policy needs to be created, updated, or removed?			
Does the library have a schedule for reviewing policies?			
Have all of the library policies been reviewed within the last 4 years?			

19. The Board understands the revenue sources that fund the library, the budgeting process, and adopts a budget for the library accordingly. Mark this standard as met if you answer yes to ALL of the questions below.

Interpretive Question	Yes	No	N/A
Does the Board understand what revenues fund library services?			
Does the Board understand how each of the revenue sources has been and can be used?			
Does the Board know what the timeline and process is for creating and adopting a budget?			
Does the Board adopt a budget by the locally required deadline?			

20. At least 70% of the revenue of a library created under Title 7 or Title 22 is from local tax revenues. Grants, donations, and other revenue sources supplement but do not supplant local tax support.
21. If a tribal college library serves tribal members, the Tribal Council recognizes and supports the efforts of the library to obtain funding.
22. The Board and Director identify what level of funding the library needs to achieve the library’s mission. The Board and Director explore and identify ways to obtain sufficient resources. Mark this standard as met if you answer yes to ALL of the questions below.

Interpretive Question	Yes	No	N/A
Have the Director and/or staff identified unmet library needs?			
Has the Director created an estimate of how much funding is needed to address those needs?			
Has the Director communicated what funding is needed to the Board?			
Have the Director and Board explored ways to increase library funding – either through talking to other libraries, other organizations, or reviewing information about options?			
Have the Director and Board decided which funding sources they would like to pursue?			
Has the Director and/or a designated Board member communicated the library’s funding needs and which sources the library wishes to pursue to the local governing body?			

Access to the Library, Collections, Services, Programming, and Technology

The library plays an important role in the community. It provides access to information professionals, services, materials, tools, and spaces that support learning, decision making, personal growth, and play. You have an important job - providing these services in a way that makes everyone in the community feel welcome – no matter what their age, socioeconomic status, ethnicity, gender, or identity. You have an opportunity to showcase how beautiful your community is in all its diverse forms.

Our intent: Everyone is welcome at the library

Desired Outcomes: People have access to services, materials, and physical spaces that

- foster lifelong learning
- help people develop and pursue their ideas
- provide human connection
- encourage play

Essential Standards

1. The Board, Director, and Staff ensure that all people have access to library content and services.
2. All people (including current non-users and those who might be marginalized) know they are welcome in the library. Mark these standards as met if you answer yes to more than 50% of the questions below.

Interpretive Question	Yes	No	N/A
Have the Director, Staff, and Board regularly discussed who is not using the library?			
Does anyone from the library regularly approach individuals who do not use the library to ask them why and how the library might better serve them?			
Has the library found and used a method for asking if people feel welcome in the library?			
Have the Board, Director, and/or Staff reviewed library usage to see if there has been an increase or decrease in usage by groups who do not traditionally use the library?			
Does the Director and/or Staff regularly review their services to identify any barriers that might keep people from using the service?			
Do they identify ways to remove those barriers?			

3. People know where to find the library.
4. The library is open convenient hours. At a minimum the library is open at least the following number of hours:

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

Mark these standards as met if you answer yes to more than 50% of the questions below.

Interpretive Question	Yes	No	N/A
Are there highway or street signs that direct people to the library?			
Are people in local organizations (school, chamber of commerce, city/county offices, etc.) able to direct people to the library if asked?			
Are people who work able to use the library?			
Are students able to use the library?			
Is the library open a combination of mornings, afternoons, and/or evenings?			

5. The library provides services for those who may not or cannot physically enter the library. Mark this standard as met if you answer yes to at least 50% of the questions below.

Interpretive Question	Yes	No	N/A
Does the library provide downloadable books or audiobooks?			
Does the library provide electronic resources that people can access from anywhere?			
Have library staff identified ways to better serve those who may not be able to enter the library? (ex. Free book drop-off points or homebound services)			
Have staff implemented any of those ideas?			

6. The library is accessible, maintained, clean, and safe for staff and members of the public. The library director is aware of the general condition of the building and what maintenance issues might need to be addressed. Mark this standard as met if you can answer yes to at least 50% of the questions below.

Interpretive Question	Yes	No	N/A
Can people in a wheelchair, with limited mobility, or even with a stroller get into the library?			
Does the library have access to sufficient, well-lit parking near the building?			
Does the library provide a bike rack?			
Is the library regularly cleaned?			
Have the Director and/or Staff used a maintenance/building template that helps them identify the condition of library property and what might need to be replaced, updated, or maintained?			
Do staff and library users have a good line of sight within the building?			
Does the library have sufficient internal and external lighting for people to be able to see and safely use and enter the building?			
Do building exits meet fire codes?			

7. Library users have access to physical and digital materials. Mark this standard as met if you answer yes to at least 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Does the library provide downloadable books or audiobooks?			
Does the library provide electronic resources that people can access from anywhere?			
Does the library provide print materials?			
Does the library provide DVDs or books on CD?			

8. Library users can obtain materials from another library through services offered at the library. Mark this standard as met if you answer yes to at least 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Does the library provide interlibrary loan?			
Does the library belong to a group of libraries who share materials as if all of the libraries in that group were one library? (To the library user this is the ability to place a hold on items owned by any of the libraries in the sharing group.)			

9. Library users have access to local items about the culture, government, and history of the area. People can find information about local events and local government through the library. Mark this standard as met if you answer yes to at least 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Do library staff collect local/regional history items and add them to the library's collection?			
Are library staff able to connect people with other organizations or resources on the culture and history of the area?			
Are library staff able to connect people with local government information?			
Does the library post information about local events and local government information?			

10. People are connected to the relevant resource they need. Mark this standard as met if you answer yes to the ALL of the questions listed below.

Interpretive Question	Yes	No	N/A
Do library staff provide reader's advisory services?			
Are library staff able to connect people with other organizations or resources that can provide the information or services the person needs?			
Do library staff provide reference services?			

11. People who cannot read traditional print are connected to alternative formats. Mark this standard as met if you answer yes to at least 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Does the library collection include audiobooks or other formats that people who cannot read traditional print can use?			
Does the library inform these users about services like the Montana State Library Talking Book Library or other local services?			

12. Library staff regularly evaluate, add to, and weed the library's collection. Mark this standard as met if you answer yes to more than 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Do library staff use reviews, patron requests, journals, newspapers, and other resources to regularly select items to add to the collection?			
Do library staff regularly purchase and add new items to the library collection?			
Does the library have a collection management policy that addresses selection and weeding?			
Do library staff regularly review circulation and usage statistics to identify what is and is not being used in the library's collection?			
Do library staff use this information to add and remove items from the library's collection?			
Do library staff have a process for reviewing items and removing them when they are outdated or in poor condition?			

13. Users have access to programming. Mark this standard as met if you answer yes to ANY of the questions listed below.

Interpretive Question	Yes	No	N/A
Do library staff or volunteers provide storytime?			
Do library staff or volunteers lead book discussion groups?			
Does the library provide or work with other organizations to provide programs at the library?			

14. Users have access to the Internet.

15. Users have access to WIFI.

16. Users have access to or can be directed to technology sufficient to their needs. Mark these standards as met if you answer yes to more than 50% of questions listed below.

Interpretive Question	Yes	No	N/A
Does the library provide computers with Internet access for the public to use?			
Does the library provide WIFI access for as many hours in the day as it can?			
Does the library provide printers for public use?			
Do people have access to common software tools? Ex. Microsoft Word or Excel.			
Does the library provide access to devices (laptops, tablets, etc.) that people can use in the library?			
Can library staff direct people to other organizations that can provide access to technology that the library does not own?			

17. People who need help using the library’s technology receive assistance. Mark this standard as met if you answer yes to the question listed below.

Interpretive Question	Yes	No	N/A
Do staff or volunteers provide one-on-one assistance or classes for patrons who need help with the technology?			

Personnel, Salaries and Benefits, Certification, Directors

Library staff (and volunteers) are the ones who carry out the work of the library. They are the face of the library, and the services the library provides would not happen without them. Developing and providing support to library staff will lead to better services for all Montanans.

Our intent: Library directors and staff are fairly compensated and have the tools and education they need to provide library services so that all Montanans can seek information and pursue ideas.

Desired outcomes: Library directors and staff

- are fairly compensated
- have the tools and education they need to provide library services sufficient unto the needs of all Montanans
- build a learning culture that supports all Montanans’ lifelong pursuit of inquiry and learning
- work in a supportive environment

Essential Standards

1. Staff members are offered health insurance according to local policy.
2. Staff members are offered retirement benefits according to local policy.
3. The Board adopts a sufficient budget for continuing education. Mark this standard as met if you answer yes to more than 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Does the budget for continuing education include funding for the Director to attend professional development opportunities?			
Does the budget for continuing education include funding for staff to attend professional development opportunities?			
Does the budget for continuing education include funding for board members to attend professional development opportunities?			

4. The library offers a competitive enough compensation package to attract and retain high quality staff. Mark this standard as met if you answer yes to ANY of the questions listed below.

Interpretive Question	Yes	No	N/A
Have the Board and/or Director compared library salaries to similar size libraries and made efforts to bring salaries into line with those libraries?			
Have the Board and/or Director compared library salaries to similar positions in local government and made efforts to bring salaries into line with those positions?			
For positions that see a lot of turnover have the Board and/or Director analyzed whether or not compensation is a factor, and if it is have they increased the compensation?			

5. During open hours, paid staff are available to assist users.
6. Staff have the tools and training they need to perform their work.

Interpretive Question	Yes	No	N/A
Do staff have access to a computer and the software they need to perform their work?			
Have the Director and staff discussed any equipment, software or training needs that should be addressed and how to address those needs?			
Do staff have an opportunity to attend training that helps them perform better?			

7. Every position has a written, current, and accurate job description. These descriptions are reviewed at least every 4 years.
8. Staff receive regular feedback on their performance and what is expected of them on the job. Mark these standards as met if you answer yes to more than 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Are staff asked to review their job descriptions and suggest changes as part of the review process?			
Do staff regularly meet with their supervisor to discuss expectations and receive feedback?			
Are staff aware of what the Board and Director want to accomplish and their role in achieving those accomplishments?			

9. Staff are encouraged to become certified by the Montana State Library.
10. The director is or will be certified by the Montana State Library within the required timeframe mandated by the certification program adopted by the Montana State Library Commission.
11. Directors of libraries that serve over 25,000 people have a Master of Library Science or equivalent degree.
12. Directors are strong library advocates and receive training about advocacy at least every year. Mark this standard as met if you answer yes to attending training annually and more than 50% of the other questions listed below.

Interpretive Question	Yes	No	N/A
Does the Director know local government and community leaders?			
Is the Director able to communicate the value of the library in language that key stakeholders understand?			
Does the Director follow state and national legislation regarding libraries?			
Does the Director annually attend training about advocacy? (MANDATORY)			

Public Relations

Informing people about what is going on in the library is important and challenging. Public relations includes building awareness of the library and developing positive relationships with community members. Doing this connects the library to the community which helps staff build services that are in tune with community needs. It also builds support for the library.

Our intent: The community is strengthened by the relationships between the library and community members.

Desired outcomes: Community members

- are aware of the services the library offers that can help them seek information and pursue ideas
- inform the library about their information needs
- support libraries

Essential Standards

1. Library staff internally and externally advertise library programs and services. Mark this standard as met if you answer yes to at least 50% of the questions listed below.

Interpretive Question	Yes	No	N/A
Do library staff create promotional materials that library users can find in the library?			
Do library staff talk about library services or upcoming events to library users and community groups?			
Do library staff create promotional materials that are posted outside of the library?			
Do library staff create press releases for local media?			
Do library staff know where to post materials (either in print or electronically) where community members will see them?			
Do library staff promote library services electronically?			

2. Library staff maintain a website or social media presence. Mark this standard as met if you answer yes to ANY of the questions listed below.

Interpretive Question	Yes	No	N/A
Does the library maintain a website with up-to-date information about the library and the services it provides?			
Does the library maintain a social media site with up-to-date information about the library and the services it provides?			

3. The Director annually invites at least one local government leader to visit the library.
 4. The Director annually invites at least one local community leader to visit the library.
- Mark these standards as met if you answer yes to ALL of the questions listed below.

Interpretive Question	Yes	No	N/A
Has the Director invited the Mayor, a City Council member, or a County Commissioner to the library?			
Has the Director invited a local community leader like the President of the Chamber of Commerce, School Superintendent, or prominent small business owner to the library?			

5. The Director attends at least one local government board meeting every year.

Stretch Standard

The Montana State Library trusts that library directors, board members, and staff strive for excellence. State Library staff will support and assist libraries in working towards excellence. Using a process that works best for the library, the Library Director, and Board will work towards achieving one excellent standard. The Director and Board will identify what assistance they need and will craft a plan for achieving that standard. The excellent standard should align with work the library is already doing. The Montana State Library recognizes that it may take time to achieve an excellent standard. Once a standard is achieved, the Montana State Library will ask the Library Board and Director to work towards another excellent standard.

1. Which excellent standard do you want to try and achieve?
2. How do you plan on achieving that standard?
3. What assistance do you need from Montana State Library staff to achieve that standard?

Deferrals

1. For any standards that you cannot meet, please answer the following questions.
 - a. Why doesn't your library meet this standard?
 - b. How do you plan on meeting the standard in the future?