North Central Library District's

Handbook for New Library Directors

Revised 11/2017

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Introduction

Welcome to the North Central Library District! Serving as a public library director is an interesting, challenging and rewarding job. The opportunity to make a difference in your community is limited only by your abilities, knowledge, training and desire. This handbook will provide you with some of the basics of being a library director in Pennsylvania.

As a public library director you will be expected to know everything from how to work with a Board of Directors to complying with complex library laws. And for some of our libraries, you may even be ultimately responsible for shoveling the sidewalk!

We want you to know, as you navigate this complex path, that you have support from your District Center, the James V Brown Library, and for those of you belonging to library systems, from your system administrator.

A special thanks to Shelby Kinsey, System Administrator for the Potter Tioga Library System, for contributing to this handbook; to Elisabeth Miranda, Director at Blossburg Memorial Library, and Barbara McGary, District Administrator for the North Central Library District for their invaluable input.

> *"To make a positive difference in the lives of our community members from age 0 to over 104 is a daily goal that gives me great joy when it is achieved. To calm a shy baby with smiles and peek-a-boo, to entice a young teen into trying a new author, to help a person with sight problems with large print or audios that are best sellers or old favorites -- these are the accomplishments that a director strives for."*
>
> *Sue Wolfe, Allen F. Pierce Free Library, Troy*

Section 1
Public Library Structure in Pennsylvania: An Overview
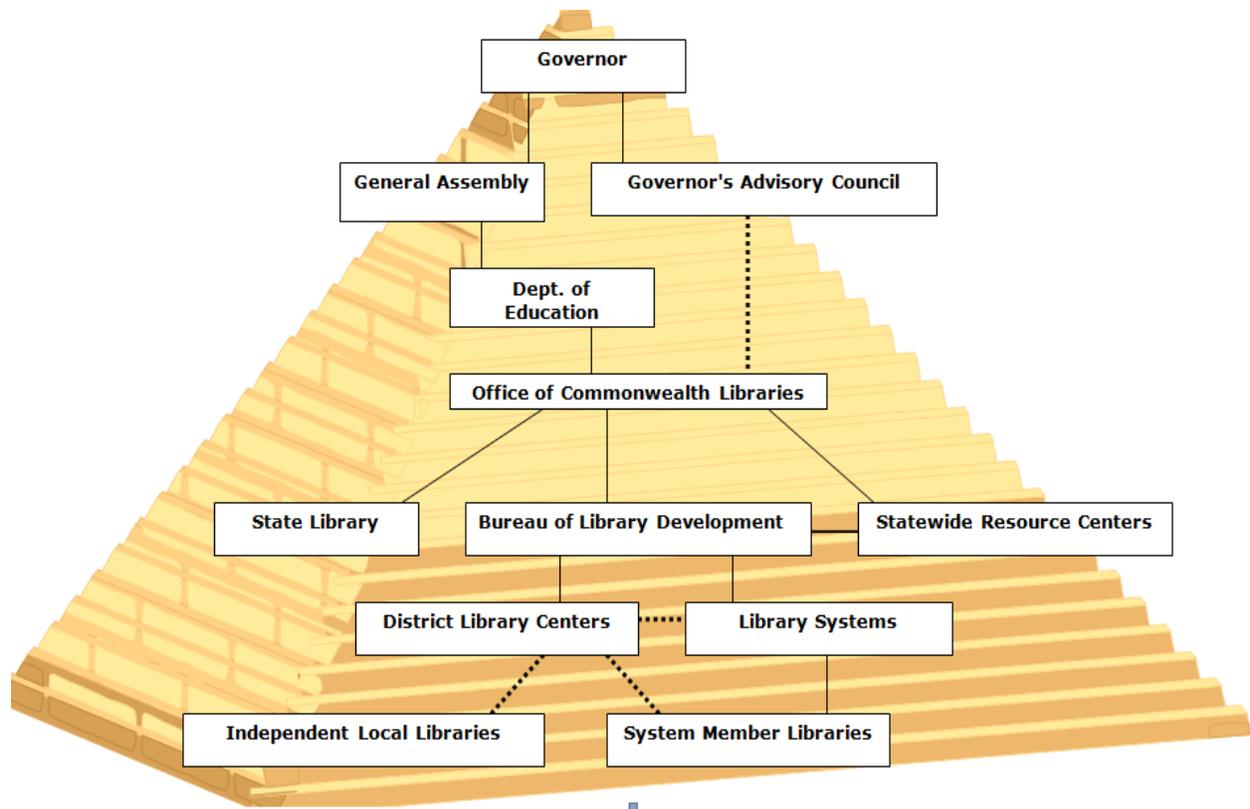
Local Libraries
Public libraries play a key role in their communities as centers for lifelong learning and community hubs. They offer educational and cultural enrichment opportunities for all residents of their service areas by providing relevant materials, services and programs. Lifelong learning is for all ages – from infants to senior citizens.

Toward that end, the local public library has the responsibility for providing a basic collection of up to date materials in a variety of formats. A local library's collection development policy will dictate what items are collected. These might include books, pamphlets, magazines, newspapers, audio recordings, computer related materials and services (including Internet access and database searching tools), pictures and microforms. The collection of each local library also includes

the resources available through the state's POWER Library databases and other online resources provided by the System or District.

Public libraries provide a variety of services such as reference, interlibrary loan, children's activities, services to the underserved and programs for all ages. The local library looks to its community for what service needs are required and plans for growth and a successful future. The district library centers, and in some cases county library systems, each play a role in the success of the local libraries in their geographic areas of responsibilities. The District Center is a resource for library directors.

Libraries with Branches

A main library with branches is considered one library. The library may have a Chief Executive Officer, Library Director, and Branch Managers. They are governed by one board or in some cases, an advisory board if the library is a part of county or city government.

Federated Library Systems

Library systems are groups of libraries within a county that join together for financial support and to improve the level of service provided to all users within their service areas. Thirty-three of Pennsylvania's 67 counties are served by a county library system. Examples of services offered by systems are: coordinated activities to increase financial support for system members, countywide automation, Internet access, and other technology support, coordinated planning for and evaluation of services, resource sharing among the libraries in the system, in-service training for system library staff and trustees and services to the localities in the service area that do not have designated local libraries. Each federated system has a system administrator who coordinates system activities and oversees the system budget. In some cases, a system administrator may also be the director of a library within the system. System members benefit from the expertise of a system administrator who can act as a resource for library directors. The Association of Pennsylvania Public Library Systems (APPLS) supports county system administrators. Each system also has a system headquarters library that has to meet higher standards for collection and hours of operation.

District Library Centers

Currently there are 29 District Library Centers in Pennsylvania. The district center is a strong local library (or could also be a system headquarters) designated by the State Librarian to serve as a source of assistance to the citizens and local libraries within its district. The district centers receive funding to provide support services for the local public libraries in their districts. District services often include delivery, reference, interlibrary loan, continuing education, public relations and, the services of the District Consultant, who can be called on to help with any questions about being a new library director.

Other District Center staff members may also provide advisory assistance to local librarians, trustees, municipal officials and interested citizens within the district through periodic visits, district meetings and workshops, but District Consultants have the primary responsibility for this advisory assistance. They also help their local libraries develop strategic plans and assist with the development of a district plan.

The Bureau of Library Development provides advisory services to district centers by assigning a Library Development Advisor as liaison to each of them. As a rule, this "consultant's consultant" is the first point of contact with the state office. This liaison works with the district consultant to help channel and interpret information from the Office of Commonwealth Libraries in order to improve services to local communities.

DISTRICT LIBRARY CENTERS

The North Central Library District covers 11 counties in the north central part of the state. Forty libraries with 44 physical locations make up the district. James V Brown Library in Williamsport is the largest library and is also District Headquarters. The District Administrator is the Executive Director of the James V Brown Library.

The following counties are federated systems: Bradford, Potter/Tioga, Lycoming County, and Union County. Snyder County and Clinton County have main libraries with branches. Two of our counties, Sullivan and Montour, have one library in the county. Libraries in the remaining counties, Columbia and Northumberland, are not part of a library system.

District Services
The North Central Library District employs a district consultant who is a liaison to the Office of Commonwealth Libraries, and is a resource for library directors, system administrators, boards, municipal officers and other interested individuals and groups. The district consultant helps orient new library directors, helps

libraries through the strategic planning process, provides information and resources of interest to boards and directors, provides continuing education opportunities, and makes periodic visits to member libraries, among other duties. The district center also employs a technology consultant who helps libraries assess and plan for technology services. The technology consultant also develops training materials for use with library staff. The district employs a part time youth services consultant who participates in statewide initiatives and develops continuing education opportunities for youth services.

The district provides access to thousands of electronic books and audios through eBranch2Go, powered by Overdrive. All district member libraries have access to eBranch2Go through their web sites. The district employs a web administrator to design and update web sites to market libraries and provide access to electronic services. The district also provides postage paid interlibrary loan to all district members as well as cataloging expertise. Contact the district consultant for more information on district services. (See appendix for District Contact Information).

Statewide Library Resource Centers
A Statewide Library Resource Center is a library designated by the Pennsylvania Library Code to receive state aid for the purpose of acquiring major research collections. There are four statewide resource center libraries in Pennsylvania: the Carnegie Library of Pittsburgh, the Free Library of Philadelphia, the State Library of Pennsylvania and Pennsylvania State University Library. Together they comprise a vast research resource capable of meeting the needs of most Pennsylvanians. Their collections augment those of the local libraries and district centers. Materials are sent to the district centers via delivery services or they may be used at the resource center library.

Pennsylvania Department of Education, Office of Commonwealth Libraries
The Office of Commonwealth Libraries is a department within the Department of Education and leads the development of Pennsylvania's academic, school, public and special libraries to meet the information, education and enrichment needs of its residents.

Bureau of Library Development:
The Bureau of Library Development provides leadership for better library service by:

- *Encouraging adoption of good management practices;*
- *Developing and implementing comprehensive plans;*
- *Increasing public awareness of quality library services;*
- *Advising all public libraries and municipalities;*
- *Advising academic, institution and law libraries;*
- *Collecting, analyzing and disseminating statistics;*
- *Encouraging resource sharing among all types of libraries;*
- *Administering state and federal money.*

The Bureau of Library Development

1. Provides a direct consulting and continuing education program to district library centers; local public, school, and academic libraries; state institution libraries and government officials covering all phases of library management and operation;

2. Administers a program of state aid to public libraries and promotes sharing of library resources through a variety of cooperative programs affecting libraries statewide;

3. Coordinates a program of library services to people with disabilities in Pennsylvania through designated Regional Libraries for the Blind and Physically Handicapped, operated by the Free Library of Philadelphia and the Carnegie Library of Pittsburgh;

4. Administers the federal Library Services and Technology Act (LSTA) funds and the state Keystone Recreation, and Conservation Act Library Facilities Grant Program.

There are two divisions within the Bureau of Library Development: Library Improvement and Grants and Subsidies.

Library Code and Regulations

The Library Code, passed in 1961, set up a system of local libraries, district library centers, and regional resource centers. It provides state money to support this system and to stimulate local funding of public libraries. The Library Code defines what a library is and how it is governed. Title 22 of the Library Code contains the regulations that further define and implement the Library Code. The regulations have the force of law. They contain basic and minimum standards, library system standards and district library center standards.

The Public Library Code (2012) is a continuation of the Act of June 14, 1961, known as the Library Code. The library regulations at present define how many hours a library should be open according to the population the library serves. However, the new (2012) code specifies that libraries must be open 45 hours per week. The Public Library Code is new, but as of this writing, there are no new regulations to define and shape the code. The Governor's Advisory Council in cooperation with the Office of Commonwealth Libraries are in the process of revising the regulations to fit the new code and to provide some flexibility as library services evolve in the coming years. The Public Library Code and regulations can be found at the following link:
http://www.statelibrary.pa.gov/Libraries/LawsRegulations/Pages/Pennsylvania-Code-and-Regulations.aspx

New directors will want to familiarize themselves with the Library Code and regulations. The Code and regulations are complex and the district consultant can help interpret them.

State Aid

The following provides a brief description of the seven categories of state aid that are part of the state aid formula as determined by the Library Code. The formula has actually not been run since 2002-2003. Since then library systems and independent libraries have received a percentage increase or decrease reflective of the increase or decrease in the state appropriation for the Public Library Subsidy.

1. Quality Libraries Aid

Eligibility
- Required Local Financial Effort of $5 per capita for service area.
- Meet Quality Libraries Aid Criteria (Library Code).
- Meet Basic Standards (Library Regulations).

How Is It Calculated?
- Based on library service population.
- Multiplier determined by State Aid appropriation.
- The 2002-03 payment was $1.82 per capita.
- $1.82 X Population = Quality Libraries Aid.
- For example, a library serving 10,000 people receives $18,200 in Quality Libraries Aid.

Local Financial Effort

"…Sum expended annually by a local library…which derives from local taxes, gifts, endowments and other local sources…and which is used to determine eligibility for State-aid." --- The Library Code, Section 302 (3)

2. Incentive for Excellence Aid

Eligibility
- Library or system must expend over $5.00 per capita in local financial effort. The incentive starts at $5.01
- Meet Quality Libraries Aid Criteria and Basic Standards
- Meet Incentive for Excellence Aid Criteria and Minimum Standards

How Is It Calculated?

Incentive for Excellence Aid is paid on a per capita basis on a two-tiered level. In 2002-2003 the aid was paid as follows:
- Tier 1: $5.00 - $7.50—Paid 80% return on the $2.50 per capita in this tier.
- Tier 2: $7.51 - $15.00—Paid 6.5% return on the $7.50 per capita in this tier.

Incentive for Excellence Aid Financial Requirements
- To qualify the library or system must:
  - Maintain its local financial effort. *The Library Code, Section 303.5 (D)*
  - Maintain its local government income. *The Library Code, Section 304 (D)*

- Local Financial Effort:

  "A local library or library system shall not use Incentive for Excellence funds to reduce its financial effort for normal, recurring operating costs from a previous level unless evidence of substantial curtailment of financial ability of the community is accepted by the State Librarian." *The Library Code, Section 303.5 (D).*

- Local Government Income:

  No plan for the use of Incentive for Excellence funds shall be approved if it projects a decrease in local government support for normal, recurring, operating costs from a previous level unless:
  - The State Librarian determines that the decrease is directly attributable to a gift or endowment to a library
  - Or that there is a substantial decrease in the financial ability of the municipality … *The Library Code, Section 304(D)*

3. County Coordination Aid

- Purpose of aid is to implement plan for countywide services for county residents.
- Funding based on classification of county and amount of county appropriation for libraries:

Class	Percentage Match
2	5%
2A & 3	30%
4	50%
5	50%
6	100%
7	100%
8	100%

- Because the category of aid is not yet fully funded, all classes of counties above except 8th class received 54% of the aid when the formula was last run in 2002-2003.
- County Coordination Aid is in addition to Incentive for Excellence Aid. County appropriations are the only type of library income that is matched twice.
- County funding guarantees that all residents of the county receive free library service.

4. District Library Center Aid
- District Centers are public libraries from across the state that have significant collections and are able to provide services to local libraries.
- There are 29 District Centers in Pennsylvania.
- Services include interlibrary loan, reference, delivery, and advisory services.
- District Centers must meet District Library Center Standards.
- Currently District Centers receive $1.04 per capita or a minimum of $210,000.

5. Statewide Library Resource Center Aid
- There are four major research libraries in the state that provide assistance to local libraries. They are:
  - Penn State University Park
  - Carnegie Library of Pittsburgh
  - State Library of Pennsylvania
  - Free Library of Philadelphia
- Services include interlibrary loan, reference, electronic reference, and digitization.

6. Equalization Aid
- The purpose of Equalization Aid is to provide special funding for libraries in economically distressed areas of the state.
- Public libraries qualify by meeting any one of the following three economic indicators:
  - Market value below the 5th percentile of all municipalities, as certified by the Tax Equalization Board
  - County having personal income per capita below the 15th percentile of all counties, as certified annually by the Department of Revenue.
  - County having an annual average unemployment rate above the 70th percentile of all counties, as determined annually by the Department of Labor and Industry.

7. Equal Distribution Grants

- Libraries, branches, and bookmobiles that meet Basic Standards are eligible.

Section 2
Funding

There is no clear model of funding on the local level for public libraries. Some public libraries have a dedicated library tax from the municipality in which they are located. Others receive an appropriation from municipalities. Some municipalities make an annual donation to their library and others do not. Public libraries typically receive donations in the form of memorials. Memorial funds are used for purchasing books and a plaque with the names of the donor and the honoree is placed in the book. Other memorial funds may be used to purchase furniture and/or equipment. These funds are usually restricted for that purpose. The library may receive donations that can be used for operating expenses. It's important to know the difference. Many libraries conduct an annual appeal or other fundraising activities. Understanding how the library is funded will be one of the first things a new library director will tackle.

Budgeting
The library's annual budget should be developed by the board with input from the library director. Most libraries track finances using QuickBooks® software. It is recommended that the library's budget line items conform to those used in the state annual report. This eases the process of reporting to the Commonwealth and creating annual reports with common frames of reference. Note: Because this information is critical to the operation of the library and may need to be accessed by others, all financial materials should remain in the library at all times. (See Appendix for sample budgets)

State Grants
Keystone Grant for Public Library Facilities is a grant to improve the facilities of Pennsylvania's state aided public libraries. The maximum grant amount awarded is $500,000. Keystone grants must be matched dollar for dollar and public libraries must be sponsored by their municipality. Information about Keystone grants can be found at the following link:
http://www.statelibrary.pa.gov/Libraries/Subsidies-and-Grants/Pages/default.aspx

Library Services and Technology Act grants are funds administered by the Office of Commonwealth Libraries. The federal funds are made available by the Institute of Museum and Library Services. These funds are then made available to libraries and library systems with projects that fit within the state's five year plan. Pennsylvania's LSTA Five-Year Plan includes goals allowing the Office of Commonwealth Libraries to assist libraries in linking to each other or to other information resources, to encourage the development of consortia, and to increase information access for persons who have difficulty gaining it. LSTA funding may not be used for construction or renovation, projects that have already begun or operating expenses. More information can be found at the following link: http://www.statelibrary.pa.gov/Libraries/Subsidies-and-Grants/Pages/default.aspx

E-Rate

The Universal Service Schools and Libraries Program, commonly known as the E-Rate Program, helps ensure that schools and libraries can obtain telecommunications and Internet access at affordable rates. The library may be applying for E-Rate to offset these costs. Discounts are based on how many students in the local school district are eligible for the National School Lunch Program. The E-Rate program is phasing out paying discounts on telephone costs. The discounts will be reduced each year by 20% starting in 2015. E-Rate training is conducted periodically. The E-Rate in Pennsylvania web site (http://e-ratepa.org/) is a good starting point for learning about E-Rate and its complexities. Sign up for the state listserv by sending an email to jtschell@comcast.net. The district consultant has information to help get started.

Section 3
Library Directors

As leaders, library directors "steer the boat" toward continued library improvements that, as a result, benefit library patrons (or users). To accomplish this, directors will need to lead and inspire staff, work with community

organizations, motivate and encourage trustees, influence volunteers and sometimes even persuade government officials. Directors need to be particularly competent at "people skills," especially proficient in communicating with everyone they serve and work with. In addition, directors need to be knowledgeable about budgets, advocacy and state reporting.

> *"The best bit of advice for a Library Director I've ever heard came from Sister Mary Margaret Cribben, who taught Library Administration at Villanova University. The very first thing she said in the very first class was this: If you want to be a successful library director, you only need to learn this one rule— People are more important than things, always. Always.*
>
> *Be flexible and empathetic with both your staff and the public. Don't let rules run the library—you run it, using rules as guidelines, not excuses, for your actions."*
>
> *Hal Pratt, Bloomsburg Public Library*

Certification

Pennsylvania requires state aided libraries to hire certified library directors according to population:

1. Library assistants shall have two years of college education in addition to 9 credit hours of library science courses. (Library service population under 9,999.)

2. Provisional librarians shall have a 4 year college degree and 12 credit hours in Library Science. (Library service population between 10,000 and 19,999.)

3. Professional librarians shall have a 4 year college degree in addition to one or more academic years of professional library education. (Library service area population over 20,000.)

Library assistants and provisional librarians may obtain the required credits through ALA accredited master's degree programs such as those at Clarion

University, Drexel University, or the University of Pittsburgh in Pennsylvania. ALA accredited programs from other states are acceptable. Another less expensive option is the certificate program at Northampton Community College. Professional librarians must gain their credits from an ALA accredited program or from an approved Office of Commonwealth Libraries program.

System certification: Libraries that are part of a system and serve a population of less than 5,000 are system certified.

TIMS/PPID - All applications for librarian certification must be submitted to the Pennsylvania Department of Education through TIMS (Teacher Information Management System). See appendix for TIMS instructions.

Duties and Responsibilities
- Hire and supervise all staff members.
- Recommend and draft policies for board action. Carry out adopted policies, delegating to staff as needed.
- Work with board to prepare annual budget
- Maintain an active program of public relations and public information.
- Keep abreast of local and state laws. Keep board informed of pending legislation, library trends, developments and standards.

Leadership/Communication
The Board hires the library director, but the director is responsible for hiring, managing, and potentially firing, other staff members. Keep the lines of communication open at all times for a successful working relationship. Asking for their suggestions at times and following through with their ideas will help maintain an upbeat culture. Give them positive feedback on jobs well done. Be sure the staff has up-to-date job descriptions, and give performance evaluations annually and document, in writing, the director's priorities and expectations.

Management (Day to day operations)
- Lend materials
- Provide computers and a connection to the Internet
- Facilitate youth and adult programming
- Provide library services to public (fax, copies, etc.)
- Offer reference services

- Check email
- Prepare reports
- Supervise staff

Collection Development/Evaluation/Weeding
Involves the identification, selection, acquisition, and evaluation of a collection of library resources for a community of users, but also includes writing collection policies, weeding the collection, dealing with challenges to materials, monitoring the condition of materials, and making decisions about preservation and conservation. (See Appendix for a sample collection development policy)

ILS (Integrated Library System)
An automated library system usually consists of a number of functional components, such as acquisitions, circulation, cataloging, serials, and an OPAC. In an integrated system, all of the functional components share a common bibliographic database. Most libraries buy an ILS from a vendor. There are many vendors of integrated systems. One source for information on vendors and systems is "Automated System Marketplace" which is published annually in Library Journal.

> *"Know cataloging principles and theories. That's the main difference between what we do and what a bookstore does."*
>
> *Jeff Singer, Bradford County Library*

Section 4
Personnel

Job Descriptions
All library employees should have job descriptions that list the essential duties of each position, any education and experience required, the physical and mental requirements of the job and the salary range. These components should be

reviewed and updated regularly. Job descriptions should comply with the Americans with Disabilities Act, the federal Fair Labor Standards Act, and any state statutes regarding fair employment practices.

Having an employee handbook or personnel policies is important to lay out expectations and to inform employees of policies and procedures. (See appendix for sample employee handbook outline).

Hiring/Firing

A library should have written employment policies, including hiring/firing procedures and directors should follow them consistently.

Hiring:

- Do not discriminate based on race, color, gender, religion, disability status, etc.
- Respect the applicant's right to privacy: marital situation, economic background, personal life.
- Don't imply things that can't be delivered: job security, benefits.
- Observe all laws relating to minimum wage, hiring young or immigrant workers.
- Follow the IRS guidelines for hiring independent contractors.
- Follow all IRS and State new hiring requirements.

Firing:

- Do not fire an employee in anger.
- Follow policy.
- Document reasons for discharge.
- Include an observer.
- Use a termination letter.
- Be respectful.

Section 5
Policies and Procedures

Collection Development Policy
This critical policy is used by library staff to select, maintain, preserve, and weed materials. It can also serve as a tool to acquaint the public with the principles of collection development and intellectual freedom.

Personnel Policy – The hiring, training, supervision, motivation and evaluation of staff are key factors in developing high-quality library service. A personnel policy provides the framework for creating a positive workplace environment. A personnel policy should include the following:

- Recruiting/Hiring
- Salary and Benefits
- Code of Conduct
- Evaluation Procedures
- Discipline/Termination
- Jury Duty
- Attendance/Leave
- Grievance Procedure including whistleblower/non-retaliation protection
- Continuing Education/Professional Development
- Equal Employment Opportunity Statement
- Volunteers
- Clearances

Sample personnel policies may be found at the following link:
http://northcentrallibraries.org/ncld-staff-resources/

Circulation Policy
This policy ensures equal access for all to the library's materials and services. At the same time, it ensures that some borrowers don't abuse privileges to the detriment of others. In an era of increased resource sharing, agreements with other libraries and consortia should be referenced and their benefits briefly explained.

Acceptable Behavior Policy/Code of Conduct

Although by design this type of policy contains some restrictions, its overall purpose is intended to be positive. It sets forth the library's commitment to providing an atmosphere where people of all ages and circumstances feel welcome and safe.

Section 6
Planning

Mission/Vision
The mission statement, tailored to meet the needs of the community, establishes the library's purpose, values, and beliefs. The mission is why the library exists.

A well-designed mission statement will:

- Guide choices and help set priorities
- Spotlight the benefit of the library to the community
- Establish the library as a valuable asset to the community

The trend is for the mission statement to be short, sincere and simple. Employees and staff must believe in and be able to support the values expressed in the mission statement.

Strategic Planning
Strategic planning is a shared responsibility between the library board and library director. A clear, concise plan provides the community with a road map to the library's development. It distills the vision of what the library hopes to accomplish during a specific time period, usually three to five years. Most importantly, it describes the goals, objectives, activities, and outcomes within each service area and provides a step-by-step account of how the library will achieve this vision.

Components of an effective strategic plan:

- Mission Statement - the library's purpose, values, and beliefs
- Vision Statement – a description of the library's desired future state
- Values Statement – the principles on which the library is built, and that guide its planning, operations, and programs
- Goals and Objectives – answers the question, "What do we want to accomplish?"
- Strategies – approaches or activities needed to achieve goals and objectives
- Implementation – library's "user's guide" to the strategic plan

Technology Plan

A technology plan outlines in detail what technology projects the library intends to take on and how these projects will be completed. Done well, a technology plan provides clarity to all stakeholders involved, pinpoints needed resources, constrains goals to reasonable boundaries, and provides for evaluation of project success.

Components of a Technology Plan

- Strategies and Goals – Establish clear goals and a realistic strategy for using telecommunications and information technology to improve library services.
- Professional Development – A professional development strategy to ensure that staff knows how to use new and current technologies effectively.
- Technology Assessment – An assessment of the telecommunication services, hardware, software and other services that will be needed.
- Budget and Financing – Provide a sufficient budget to acquire and support all elements of the plan: hardware, software, professional development and other services that will be implemented.
- Evaluation and Measurement – The plan should include ongoing evaluation in order to monitor progress toward the specified goals and make mid-course correction in response to new developments and opportunities.

Section 7
Reporting

Pennsylvania Public Library Data Collection (aka Annual Report)
In order to receive State Aid, state aided libraries are required to submit an annual financial and statistical report to the Office of Commonwealth Libraries every year. Among the numerous questions asked on the PA Public Library survey, many are about how the library's budget was spent. Each year, the board will develop the library's annual budget with input from the library director. Most libraries track finances using QuickBooks® or other similar software. It is recommended that budget line items conform to the questions asked in the required annual Pennsylvania Public Library Survey.   This eases the process of reporting to the Commonwealth each year. Annual reports are opened in January and usually due to the district consultant by the first of March.

Summer Reading Report
Pennsylvania participates in the Collaborative Summer Reading Program. Summer reading manuals are provided by the state in the fall of each year. A summer reading workshop is provided by the state or the district library center in the spring. Libraries are required to complete the summer reading report after the end of the program each summer. The report collects the following types of data: number and ages of participants, outreach programs, number and type of events/activities, how reading progress is measured and recorded, publicity, and participant surveys.

Plan for the Use of State Aid
The library's plan for spending of state funds includes Quality Libraries Aid, Incentive for Excellence Aid, Equalization Aid and Equal Distribution Aid. The plan includes local government support and how the State funds will improve the quality of services of the library.

Records Retention
Keep these records permanently:
- Articles of Incorporation
- Audit reports, from independent audits
- Corporate resolutions

- Checks
- Determination Letter from the IRS, and correspondence relating to it
- Financial statements (year-end)
- Insurance policies
- Minutes of board meetings and annual meetings of members
- Real estate deeds, mortgages, bills of sale
- Tax returns

(See Appendix for sample records retention policy)

Audits

An audit is required every year if the library's state aid (plus include, for example, any Keystone, DCED, DCNR or other state grants) amounted to $50,000 or more. Libraries receiving less than $50,000 annually in state aid are only required to submit an audit every three years, with a financial review in the intervening years.

> *"A newbie should be prepared for a mix of patrons who will welcome you with smiles, and those who will resist seeing a new face in the position until you win them over!"*
>
> *Victoria Thompson-Hess*
> *Muncy Public Library*

Section 8
The Library Board

Administrative Support for the Library Board

It is the library director's responsibility to provide administrative support for the library board. The director will play an important role in preparing for and ensuring effective library board meetings. The director will play a key role in the initial development of the library budget. The director will provide support to the library board in the development and adoption of library policies. As the library faces new issues that impact it, the director prepares background materials and

presents options and recommendations for dealing with those issues. The director should make the library board aware of library laws and other laws that pertain to their actions so that the laws will not be violated.

Leadership Issues

A library director must be an effective leader if the library is to succeed and improve its service to the community. The library board also has a leadership role. At different times and in different situations the director or the library board will play the primary leadership role. The job description and library policy statements will often define the situations in which the library director is expected to lead. The director plays a leadership role by motivating and supporting library staff and volunteers, by being active in the community, by representing the interests of the library in state level forums on library issues, and by keeping the library board informed about opportunities for improving library services. The library board will often play the primary leadership role in dealings with local and/or county government. Both the director and the library board lead by advocating for better financial support for the library and keeping the community informed of library developments. While the director always needs to be prepared to lead, there needs to be a clear understanding of and respect for the board's statutory leadership authority and responsibility.

Communication with the Board

It is the job of the library director to keep the library board informed of what is going on in the library, of the needs of the library, of problems the library is and will be facing, and of the upcoming issues that will be impacting the library. At every library board meeting, the director should report to the board on these matters. If a crisis arises relating to the library, it is important that the library board chairperson and other board members are alerted as quickly as possible.

Director and Board Relationship

The director will want to work to develop a positive relationship with the library board. A relationship in which there is mutual trust, respect, and support will greatly benefit the library. It is very important that directors take time to get to know each board member and his or her style, perspective, and special concerns and interests.

As in any relationship, there will be times when the director and the library board disagree on certain things. These disagreements should be handled in a professional manner. Discussion should be focused on issues and not on personalities. The library director should make the case for a position as effectively as possible, but should not overstate or be inflexible in that position. In the end, it is the library board that will make the final decision about library policy issues and service priorities.

Although uncommon, there is the possibility of a severe disagreement between the director and the library board. In some instances, directors may feel strongly enough about an issue to want to comment publicly about it. If this occurs, the director may wish to seek advice from an outside party such as the system administrator, the district consultant, or under some circumstances an attorney.

Board Development
It is in the best interest of the library to have board members who are dedicated, effective, who understand the value of the library, and who are committed to the mission of the library. Board members should be representative of the community and should represent as many of the community's interests as possible. The makeup of the library board should represent skills the library needs to move forward. Directors play an important role in the recruitment of new board members with these qualities. This role includes identifying library users and members of library support groups who have exhibited strong support for the library and leadership qualities. The names of these individuals should be brought to the attention of the library board. To ensure the appointment process proceeds effectively, the director should keep track of board member terms where they exist.

Serving as a library board member is a complex and demanding position. Doing a good job as a library board member requires knowledge of a wide variety of issues. Library directors play an important role in the continuing education of the library's board members. Well educated and trained board members will make the job as library director much easier. The education of library board members begins with an effective orientation (see below). Board meetings can be used as opportunities for educating board members on their responsibilities and on important local, state, and national library issues. "Getting on Board" is a tool for board development. It was developed by the Office of Commonwealth Libraries.

Printed copies are no longer available but the district consultant can send a pdf of the handbook.

Some library systems can assist in trustee continuing education and often provide workshops for trustees. The District Center also provides continuing education opportunities for library boards.

All new library board members should receive an orientation. The orientation should take place, if possible, prior to the first board meeting for the new board member. The library director, the library board chair, and possibly other library board members and staff will participate in this orientation. The library director will need to assemble a variety of background and resource materials for the orientation session. These include, among other items, the board's by-laws, previous board minutes, the library's most recent annual report, and the library's long range plan.

Sample Trustee Orientation Checklist
- By-laws and format of library board meetings
- Expectations for library board member participation
- The library's long range and/or strategic plan
- Review of current issues facing the library
- The library's budget and financial situation
- Library board powers and relationship with the municipality and/or county
- Open meeting requirement
- Role of the library director
- Public library system membership
- District Membership
- Policies on the selection and review of library materials
- Other library policies
- Friends of the Library information
- List of contact information for current board members

Section 9
Facilities

Often new directors of a small public library have quite a learning curve when it comes to managing and maintaining the library building. From snow removal to plumbing to electrical outages, one needs to know what to do and who to call. Larger libraries often have their own maintenance staff but small libraries may rely on volunteers or contracting services. Many library boards have a facilities or building and grounds committee. Meet with that committee to find out what practices are already established. Ask about a maintenance schedule which should consist of tasks that are repeated periodically such as replacing HVAC filters, cleaning gutters, cleaning that is not done on a daily or weekly basis. A yearly calendar spelling out what tasks need to be done each month will keep maintenance on track. A spreadsheet of completed tasks with costs and dates could also be helpful in budgeting for facilities maintenance.

It is helpful to have a list of service vendors, people and businesses to call when things go awry. Who to call with a plumbing issue? Who to call if the sewer backs up? Who to call when there's no heat or air conditioning? Who troubleshoots the library's computers? Who is the Internet service provider and what number do you call when the service goes down? Power company? Telephones? Wiring issues? Lighting?

Does the library have an emergency evacuation plan? How will the staff and patrons get out of the building in case of fire? Where will the staff meet? The Occupational Health and Safety Administration's guide to planning for emergencies may be a helpful resource:
https://www.osha.gov/Publications/osha3088.html

Section 10
Technology

Websites
The library's website is the digital doorway to all services, resources, and programming. The home page of the library website should be designed to highlight location, hours of operation, and contact information. Additionally, the home page should include prominently placed links to information about services and programs and a monthly calendar of events. Blogs are increasingly used as templates for websites, providing patrons with a daily account of news and events. The North Central Library District employs a web administrator that designs and maintains web sites for member libraries. Currently, member web sites are being transferred to Hostgator from Edublogs and designed using WordPress.

Competencies
Technology competencies can be developed as a part of staff development activities. These guidelines may be categorized by level of staffing or degree of responsibility. Directors may find them useful when creating or revising position descriptions, conducting performance evaluations, and helping staff adapt to new technologies. (See Appendix for North Central Library District Technology Competencies.)

Public Access Computers
The library will have a number of computer work stations for use by the public. These work stations can be used to gain access to the library's online catalog, to access online digital databases, and to gain access to the Internet. The public demand for access to these workstations for the purpose of accessing the Internet is usually very high. The director ensures that library policies are in place to delineate the best use of these workstations by the public. In particular the library needs to have an acceptable use policy which outlines the parameters for accessing the Internet using library computers. Because of the demand for Internet access, the director may need to establish procedures for scheduling use of computer workstations, such as time management software. The district IT consultant can recommend products for use in public libraries.

Section 11
Public Relations

Libraries are not the only source of information in town anymore. The library may not even be the only library in town because the web offers access to many libraries. Libraries often have better resources than can be found on the web and personalized assistance that can't be beat, but the library's community may not know that.

Examples of media outlets for public relations:
- *Newspapers* remain an effective way to get the word out about programs, description of new and enhanced services, reviews of books, and audio/visual materials.
- *Radio* provides an opportunity to broadcast public service announcements.
- *Television* is a good chance for special events coverage.
- *Advertising flyers* are informational guides of all types including brochures, bookmarks, and in house publications.
- *Websites* highlight location, hours of operation, and contact information. Links to information about services and programs along with a monthly calendar of events should be prominently displayed.
- *Blogs* are enjoying increasing use in libraries as templates for websites.
- *E-Mail* provides an opportunity to create tailored mailing lists to let individuals know about new materials, programs, services, children's program registration, etc.
- *Social networks* such as Facebook, Twitter, Flickr and Instagram accounts are easy to set up and maintain. They provide an effective way to communicate about programs, services, and community events.

Section 12
Public Services

The public library is a public service organization. It is supported by public tax dollars because it provides a benefit to the public. Directors should be ever mindful of this fact. Library services should be designed to meet the needs of the

public and to be as convenient and as easy to use as possible. A retail model in which the library user is viewed as a customer is a good one. The library should strive to satisfy the needs of the customers of the library as fully as possible. Although the customer is not always right, the library's customers should always be treated with courtesy and understanding. The library staff should always be friendly and helpful in serving the public.

The public library serves the entire community not just those who are current users of the library. Library leadership should develop strategies for making non-library users into library users. Sometimes this involves extending the services of the library beyond the walls of the library building. It also involves the marketing of the library's services.

Since no library can do everything, it is important that the director and the library board establish service priorities for the library. This is especially the case in smaller public libraries. For instance, many smaller libraries try to emphasize their role as a popular materials center.

In directing and providing services to the public, take into account that the library serves all age groups. Services are provided to people throughout their lives, from birth to death. This presents a significant challenge to the library director and staff. How to respond to this challenge depends largely on the size of the library's staff and collection.

Library Service to Children
Offering services to children is an important and substantial part of the services of every public library, but especially so for small and medium-sized libraries. Depending on the size of the library, the director may or may not take an active role in providing library service to children and young adults. Often, another staff member will have a primary responsibility for library service to this age group. Although the director may not be the primary provider of service to children, this leader should provide encouragement and see that adequate facilities and resources are made available to those who do.

Within each age group there is a significant developmental span of which the director and the library staff must be aware. Collections and programming need to be appropriate to the child's developmental stage. More and more public

libraries are developing services for children in the birth-to-five age group and to the parents and caregivers of these children.

Programming is an essential part of library service to children and the library needs to plan for this. These programs range from "lap sits" and "toddler time" to pre-school story times and regular story hours. Libraries are also moving into more nontraditional learning centers. STEM and STEAM programs are becoming more common. The District Center has a collection of Maker Kits available for loan to member libraries. If the director or someone on the staff is not able to present children's programs, volunteers from the community may be recruited to assist with programs.

Use of the public library by children is especially high in the summer when school is out. The library will almost certainly participate in the Collaborative Summer Reading Program. Summer Reading Manuals are distributed from the state to all state aided libraries. Summer Reading workshops are provided each spring. It is important for the person responsible for Summer Reading programming to take part in this training.

Library Service to Young Adults
Large public libraries are more likely to have a special service program for teens. However, even if the library is small it should develop at least some services to respond to the needs of this age group. A designated collection of materials selected to appeal to young adults would be a good start. A library program or programs designed to appeal to young adults is another way of serving this group. A primary reason that many young adults come to the library is to gather information for school assignments. Work with teachers and school librarians to ensure that students don't have false expectations of what kinds of resources are available in your library and make this as positive an experience as possible. Many schools now have student community service programs. Identify library projects with which students can assist.

Library Service to Adults
Adults constitute the library users group with the greatest age span. Their library service needs vary greatly. A significant number of adults who come to the library are there to find a good book or audio-visual item for themselves or someone in

their family. Library staff can facilitate their search by creating effective displays of adult collections of materials and by providing staff assistance.

Many adults come to the library to make use of "in house" resources. They may come for the purpose of reading current magazines and newspapers which cannot be checked out or they may just come for a quiet place to study. Others are there to find information on a particular topic (see "Reference and Information services" below).

Library Service to People with Special Needs
There are people in every community who are reluctant to use the library or who may have difficulty using the library. These people fall into all age groups and have a variety of special needs. Their special need may relate to poverty, level of literacy, aging, mental illness, mobility, a speech or hearing disability, a cognitive disability, or a vision disability. The library should be able to respond to the needs of these individuals for information and library services.

Below are six general strategies that can be used to overcome barriers when working with adults with special needs. These strategies can be adapted to use when working with children and young adults with special needs.
1. Include adults with special needs and their families and advocates in planning, implementing, and evaluating public library services.
2. Welcome adults with special needs and their families and advocates to the public library in a responsive, sensitive, and appropriate manner.
3. Offer a diverse range of resources, services, and programs that are relevant to the lives of adults with special needs and their families and advocates.
4. Collaborate with community agencies to provide the best possible services to adults with special needs and their families and advocates.
5. Ensure that public library collections, services, and buildings are fully accessible and inviting to adults with special needs and their families and advocates.
6. Market public library services, collections, and programs to adults with special needs, their families and advocates, and the community.

Reference and Information Services

One of the primary functions of a public library is to help library users obtain the information they are seeking to satisfy a personal need. That need may relate to a school assignment, a business or professional problem, a hobby, or just curiosity about a particular topic. Although the library user may be able to find information on their own by consulting the library's resources, they often need additional assistance from the library's staff. Sometimes the library user's information need is simple, but it may be more complex. The training of the director and staff will determine how successfully the complex information needs of library users are satisfied.

Even if a library has a limited onsite collection of reference materials, it has access to enormous reference and information resources through the Internet. These resources include POWER Library. POWER Library is the online portal to all that Pennsylvania libraries offer. This is the place to find trustworthy answers to questions about healthcare, consumer purchases, personal finances, and more. Library patrons can enjoy free 24/7 access to newspapers, magazines, journals, historical documents and photos, online databases, and eBooks. POWER Library can be accessed through the library's web site remotely and in house.

The James V Brown Library is the district resource center. If the director and staff are unable to successfully satisfy a library user's information need, seek assistance from the reference librarian at James V Brown.

Conclusion

Support
There are several avenues open to new library directors to get support. In counties where there is a library system, the system administrator will be a valuable source of information and advice. The district consultant will visit new directors to orient them to district services and to lend support. New library directors will want to reach out to neighboring library directors. There are opportunities to network at district continuing education workshops and other trainings. The library board is also a source of support.

Below is a list of district services and contact information for each.

District Consultant June Houghtaling Phone 570.326.0536 ext. 196 jhoughtaling@jvbrown.edu	• Consults on wide range of issues • Liaison to the Office of Commonwealth Libraries • Coordinates state initiatives on the local level • Orientation for new library directors • Continuing Education • Strategic planning facilitator • LSTA Grants • Keystone grants • Manages district resources
IT Consultant Joshua Hudson Phone: 570.326.0536 ext. 152 jhudson@jvbrown.edu	• Onsite training • Onsite assessment • Training materials • Consults on technology issues
Youth Services Consultant Nina White nwhite@jvbrown.edu	• Support to member libraries in the area of baby, toddler, youth, tween and teen services • Coordinate PA One Book campaign • Collection development tools and resources • Continuing education
Web Administrator Jeremy Shatley jshatley@jvbrown.edu	• Designs library web sites • Maintains library web sites • Manages web hosting and domain name renewals
Cataloger Laura Spencer lspencer@jvbrown.edu	• Cataloging assistance • System migrations advisor • Continuing education
Interlibrary Loan Linda Aston laston@jvbrown.edu	• Processes ILL requests from district members • Mails ILLs and includes return postage • The District Center's print collection is available postage free through interlibrary loan
Reference librarian Toby Schwartzman tschwartzman@jvbrown.edu	• Supports collection development • Answers reference questions • Supports collection policy decisions
AV/Media Specialist Sue Mayshock smayshock@jvbrown.edu	• E books and audio collection development and maintenance of Overdrive
Overdrive Sue Mayshock smayshock@jvbrown.edu	• Downloadable ebooks and audios available to all members through library web sites
OCLC Laura Spencer lspencer@jvbrown.edu	• OCLC: worldwide catalog that allows staff to pinpoint locations of materials throughout the world. It is also used as a cataloging tool
Financial Officer Kristin Caringi kcaringi@jvbrown.edu	• 5 year financial projections • Consults on financial issues

A directory of district libraries may be found at the following link: http://northcentrallibraries.org/ncld-directory/

> "*Library director-Hardest job you'll ever love, you don't do it for the money, glory or fame. You do it because every once in a while you win by helping someone when they need it the most."*
>
> *Cathy Brady, Wyalusing Public Library*

Best wishes for a successful career as a public library director!

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Appendix

Checklist of Standard Library Policies

Appropriate behavior: This policy does contain some restrictions but overall is meant to be positive. It sets forth the library's commitment to providing an atmosphere where people of all ages and circumstances feel welcome and safe.

Bulletin Board (public notices): What you will post on your public display space, usually events and services of a cultural, educational or community nature.

Circulation: Ensures equal access for all to library's materials and services. Should encompass agreements with other libraries and consortia about shared services.

Collection Development: Used by library staff to select, maintain, preserve and weed materials. Should reference Intellectual Freedom.

Emergency/Disaster: Explains the proper response during an emergency. Can coordinate with municipal and county governments to let them know what services the library could provide during and emergency. This could also fall under a procedure. Example: what plumber to call, how long you will remain open if the power goes out, etc.

Exhibits: What types of exhibits will the library display?

Gifts: At a minimum, the gift policy should clearly state that the library will accept books, audiovisual items and other items with the understanding that the board has the authority to use or dispose of them however it sees fit.

Internet Use: Should cover CIPA requirements and have PA Code language about explicit materials.

Meeting rooms/study rooms: Library board should set forth guidelines about the use of meeting/study rooms – who can use them, are they free of charge, etc.

Personnel: Hiring, training, supervision, motivation and evaluation of staff. Creates the framework for a positive work environment. Key elements in a personnel policy: hiring procedures, work schedule, compensation, payroll and timekeeping procedures, benefits, worker's compensation information, performance assessment procedures, grievance procedures.

Programs: What sorts of programs will the library provide and for whom to meet its mission.

Reference: How much personal assistance by staff, formal and informal instruction in the use of library resources, use of interlibrary loan, etc.

Volunteers: How young can a volunteer be, what work they will do, and that they will receive no compensation.

Collection Development Policy Outline

- Mission and goals with community description

- Responsibility for selection

- Selection criteria for each format

- Scope of collection and priorities

- Selection procedures and vendor relations

- Evaluation, weeding and maintenance

- Censorship, access, and challenged materials procedure

- Intellectual Freedom Statement and Library Bill of Rights

- Procedure for gifts and donations

Employee Handbook Outline

VISION AND MISSION STATEMENTS

EMPLOYEE ACKNOWLEDGMENT FORM

Diversity
- Equal Employment Opportunity statement
- Anti-harassment Policy and Complaints Procedure
- Americans with Disabilities Act (ADA)

Employment
- Employee Classification Categories (if applicable)
- Background and Reference Checks
- Promotions
- Nepotism Policy
- Discipline Policy
- Separation of Employment

Workplace Safety
- Drug-Free Workplace

- Violence in Workplace
- Workplace bullying
- Safety
- Smoke-Free Workplace

Workplace Expectations
- Confidentiality
- Conflicts of Interest
- Outside Employment
- Attendance and Punctuality
- Attire and Grooming
- Electronic Communication and Internet Use
- Social Media – Acceptable Use
- Solicitations, Distributions, and Posting of Materials
- Employee Personnel Files

Time Off/Leave of Absence
- Holiday Pay
- Vacation
- Sick Leave
- Family and Medical Leave (FMLA)
- Personal Leave of Absence
- Bereavement Leave
- Jury Duty
- Voting Leave
- Military Leave of Absence

Benefits
- Medical and Dental Insurance
- Life Insurance
- Disability Benefits
- 401(k) Plan
- Workers' Compensation Benefits
- Tuition Assistance

Facilities Annual Maintenance List

Daily
- Restrooms and water fountains
- Vacuum public areas
- Sweep public areas
- Mop public areas
- Wash glass doors
- Empty trash entire building
- Wipe off surfaces in public areas
- Clean public computer equipment
- Set up daily events, daily displays

Weekly
- Vacuum offices
- Wipe off surfaces in offices
- Water plants
- Wash interior/exterior windows
- Sweep and mop storage rooms
- Sweep sidewalks, outside steps
- Dust rotating part of collections

Monthly
- Order supplies: Cleaning, Preventative maintenance, General stock
- Pest control maintenance
- Landscaping
- Check cleaning equipment

Seasonally
- Mow Grass
- Snow/Ice removal
- Check roofs/seams
- Regulate heating and cooling
- Regulate utilities
- Regulate clocks

Semi-Annually
- Change filters
- Clean coils
- Grease motors/bearings
- Check all belts
- Check Fire Extinguishers

- Check Material Safety Data Sheets
- Check Evacuation Procedures

Annually
- Change oil in generator
- Change oil filter
- Change Air Cleaner
- Change oil in lawn equipment
- Change oil in snow equipment
- Inspect vehicles
- Change oil in vehicles
- Check tires on vehicles
- Wax floors
- Steam clean carpets
- Pressure wash sidewalks/outside steps
- Schedule Inspections for elevators, fire alarms, sprinklers, security alarms, boilers

As Needed
- Change light bulbs
- Fix chairs/tables
- Paint
- Fix leaks
- Fix electrical
- Fix plumbing

Every 15-20 years
- Replace furnace
- Replace air system
- Replace roof system
- Replace floor system

North Central Library District

Technology Competencies

Level I Competencies – Recommendations for all library staff.

Terminology

_____ have an understanding of: Boot, CPU, Monitor, Memory, Hard drive, CD Rom, Flash drive/memory stick, Server, Web site, Web page, Link, URL, Operating system (Macintosh, Windows), Browser (Chrome, Mozilla, Internet Explorer), Search engine, PAC, Thumb drive, mobile devices, Wireless access, cookies, cache,

Hardware Skills

_____ Turn a computer on and off correctly

_____ Use mouse, keyboard, and function keys

_____ Recognize importance of backing up files and know how to do so

_____ Printer skills – add paper, change ink cartridge/toner, clear paper jam, cancel print job

Operating System Skills

_____ Find and launch applications from the desktop or menu

_____ Resize, minimize, and maximize windows

_____ Know basic folder and file management (understand the differences between files and folders; create, delete, and rename files and folders; etc.)

_____ Copy files onto flash drives, and other removable media

_____ Identify active window and switch between open applications

Basic Software Skills

_____ Open and close applications correctly

_____ Open and save a file to a computer's hard drive

_____ Switch from one document to another

_____ Print all or part of a document

_____ Use a mouse or keystrokes to cut/copy and paste

_____ Change font size and font type

_____ Scroll within a document

Basic Internet Skills

_____ Access the internet

_____ Interpret URLs

_____ Use navigational buttons: back, home, go, refresh, history

_____ Enter URL by typing or pasting

_____ Perform basic Internet search

_____ Scroll in web page

_____ Search for text in a web page

_____ Print all or part of a web page

PC Security Knowledge

_____ Be familiar with Internet security risks (e.g. email viruses, spy ware)

_____ Be familiar with the security precautions and software used in your library (e.g. firewall)

Email Skills

_____ Know email address

_____ Compose, send, open, read, reply to, forward messages

_____ Store and retrieve email messages

_____ Sort messages by date, subject, sender

_____ Attach a file and open an attachment

PC Troubleshooting Skills

_____ Use the Task Manager to close non-responsive programs

_____ Know when and how to reboot a workstation

_____ Understand cables, power cords, on-off switches on all equipment

Local Knowledge

_____ Know library logins and passwords

_____ Know library web site's URL

_____ Have working knowledge of library's PAC

_____ Know Internet use policy for the public

_____ Know computer policy for staff regarding email and computer use

_____ Know IT contacts and process for requesting IT assistance

_____ Complete basic circulation check in and check out process

Level II Competencies- These competencies are suggested for all library staff that work with the public.

Internet Skills

_____ Add, use, and manage bookmarks/favorites

_____ Change the default home page

_____ Clear temporary Internet files and clear history

_____ Know common plug ins (Acrobat, Flash)

_____ Be familiar with Web 2.0 applications including blogs, wikis, and social sites (instant messaging, Goodreads, Facebook, Twitter)

_____ Locate and use podcasts, e-books, and e-audiobooks

_____ Prepare workstation for and use features of online classes

Searching Strategies

_____ Locate and use common search engines

_____ Know basic, Boolean, and proximity search concepts

_____ Be familiar with topic specific searching

_____ Evaluate internet search results for relevancy, currency, and accuracy

PAC

_____ Perform keyword, author, and title searches

_____ Use advanced search strategies such as ISBN, format, etc.

_____ Limit, restrict, expand, and sort searches

_____ Determine due date, status, and location of items in the collection

_____ Place requests/holds on items in the collection

_____ View borrower information such as holds, fines and other blocks

_____ Be familiar with finding and using PACs at other library systems

POWER Library

_____ Know resources available in POWER Library

_____ Know additional databases purchased by your library

_____ Search general and most locally relevant databases proficiently

_____ Use limiters and expanders in each database (full text, lexile level, related terms, etc.)

_____ Operate printing options (full text, selected text, email, citation only)

_____ Assist patrons select appropriate database for their searches

Software Skills

▢ Word Processing (such as Microsoft Word or WordPerfect)

▢ Spreadsheets (such as Microsoft Excel)

▢ Slide Presentations (such as Microsoft PowerPoint)

_____ Able to determine which application is needed for a project

_____ Find specific text within a document

_____ Insert, move, and resize clip art

_____ Change paragraph formatting (indents, bullets)

_____ Change page setup (margins, portrait/landscape)

_____ Create documents using formatting templates

_____ Create common types of documents (resumes, research papers with footnotes, school presentations)

Public Use Workstation Management and Circulation Software

_____ Use and troubleshoot local workstation/printer management software

_____ Identify needs for special needs patrons (increase text size)

_____ Know how to use specialized software for special needs patrons

_____ Find, create, and modify all types of borrower records in circulation software

_____ Accept and apply payment of fine

_____ View and print items a borrower currently has checked out

_____ Replace damaged or missing barcode

Records Retention Schedule

Auditors reports	permanent
Bank statements, deposit slips, cancelled checks	3 years
Budgets	2 years
Employee expense reports	3 years
Employee payroll records (w2, w4, annual)	4 years
Financial statements – interim	3 years
General journal	permanent
General ledger	permanent
Inventory lists	3 years
Invoices	3 years
Payroll journal	4 years
Pension plans – agreement, financial statement	permanent
Time cards/time reports	3 years
Minutes from board meetings	permanent
Mortgages/notes of agreement	6 years
Personnel files	3 years after termination
Accident reports	6 years
Insurance policies	6 years
Settled insurance claims	3 years
Tax returns	permanent
Sales tax returns	permanent
Payroll tax returns	4 years
Pension tax returns	permanent

Schedule of State Aid Plans and Reports (varies from year to year)

January – Annual Report opens

February – District negotiations begin

March – Annual reports due to district

April—Annual reports due to state

May – District Budget negotiations

June – Annual report supporting documents to the state

July – Begin County Coordination Aid Plans

September – County Coordination Aid Plans due to the state

October – Audit or Financial Review to state Oct 1

November – Plans for the Use of State Aid due to district

December – Plans for the Use of State Aid due to state

Apply for Director Certification

TIMS
How do I login to TIMS?

To Login to TIMS, you must first Create a UserID in the PDE web portal.

Navigate to the Education Hub http://www.education.state.pa.us

In the upper left hand portion of the screen click the Register link:

The Registration page will open. Complete the form and click register:
- The registration keys on the email address and user ID submitted on the registration form.
- If you believe you have registered previously, please select "forgot password" to attempt to retrieve your initial user ID access.
- If you are acting as certifying officer or other provisioned user for an Approved Educator Preparation Program or a PK-12 Educational Entity you can use one single login ID for accessing several institutions or roles.
- If you are entering TIMS as an educator/applicant you will need a different login to access your personal TIMS educator record that has a different user ID and email address

Register

Fill in the information below to register.

These options require you to Login with your account information. If you do not have an account click the Register link above to create an account.

eSignature

Update Account Information

Name Prefix:	\<None>
First Name:	*
Last Name:	*
Name Suffix:	\<None>
Company:	
Title:	
Address1:	*
Address2:	
City:	*
State:	*
Zip:	*
Phone :	
Fax :	
Email Address:	*
User ID:	*
Password:	*
Confirm Password:	*

If you ever lose your username or password we will ask you the following question, and need to receive your given answer, to confirm your identity. Please use a question that you will be sure to remember.

Question :	*
Answer :	*

Start Over   Register

* Denotes a required field.

Wait 24 hours and return to www.education.state.pa.us and login.
- You have now created a UserID and will be able to log into the Education website and access TIMS.

To access TIMS after logging into the web portal
- Type PA-TIMS.com in the internet explore address bar and select "go"
- Select the tab across the top of the page "Access TIMS"
- The page will display that you are successfully logged into the web portal and present you with the link to enter TIMS

When TIMS opens it will present you with the opportunity to establish a new profile if you are a new educator or establish the link to your existing educator program.

- It is extremely important that you enter this information carefully and correctly
  - This screen is for applicants/educators only
- If you are entering TIMS as a certifying officer or other role for an Approved Educator Preparation Program or a PK-12 Educational Entity, you are in the wrong screen.
  - If you arrive at this screen, you have not been provisioned appropriately by your entity's Local Security Administrator or TIMS Administrator.
  - You must be provisioned as a Certifying Officer or a Chief School Administrator to view your entity's dashboard in TIMS.
  - Cancel out of this screen and contact your Local Security Administrator or TIMS Administrator for appropriate provisioning.

Select "Continue" to enter TIMS as an applicant/educator.

TIMS

How do I apply for a Certificate of Preliminary Education (Funeral Directors, Practical Nurses, Foreign-Educated Practical Nurses, Public Librarian)?

From your TIMS home page, or Dashboard:
- Click on "Applications at the top of your screen, and then choose the option for "New Credential Application," or click on the button below the Messages and the Application(s) In Process charts that is labeled "New Credential Application."
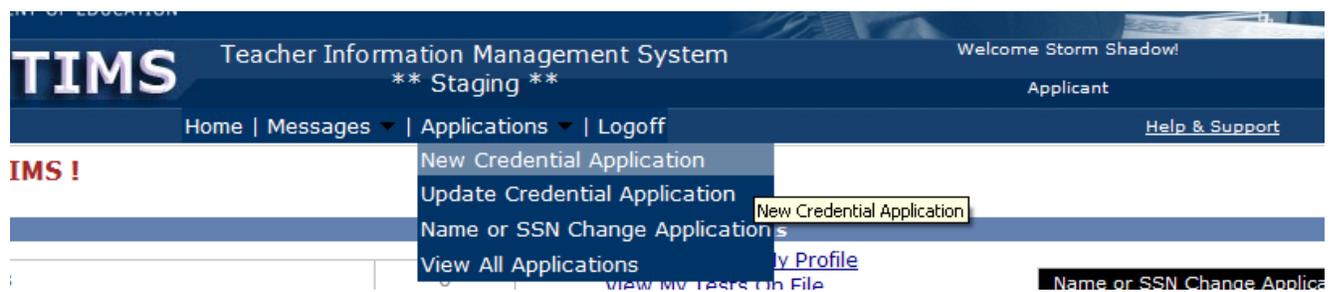
- Click on the drop down menu to select the "Requested Credential Type" you are applying for.
    - o Move your mouse over the credential type you are requesting, and then click on it.

Select Credential Type and Subject Area to be requested

Requested Credential Type*

--Select Credential Type--

Bridge Extn I (65)
Bridge I (64)
Bridge II (66)
Charter School Teacher Designation (69)
College Permanent (80)
COMMISSION (95)
CPE Funeral Director (1006)
CPE Nursing Program-Foreign Educated (1002)
CPE Nursing Program-Out of State GED (1003)
Educational Specialist I (31)
Educational Specialist II (32)
Endorsement (58)
HOUSSE Designation (67)
HOUSSE Designation - Charters Only (68)
Instructional I (61)
Instructional II (62)
Intern (51)
Letter of Eligibility (90)
Letter of Equivalency (85)
Non US Citizen (Alien) Permanent (11)
Occupational Competency (Vocational) Area Add-On (0)
Private School - Assistant Teacher (1011)
Private School - Specialist (1033)
Private School - Teacher (1022)
Private School - Temporary Approval (1010)
Program Specialist (86)
Public Librarian Assistant (1005)
Public Librarian Professional (1008)
Public Librarian Provisional (1007)
Residency (57)

rea to be requested

Continue >

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- Click on the link below the box for the "Requested Certification Subject Area(s)

- In the pop-up window that shows up titled "Select Certification Subject Area to be requested," click on the box to the right of the option "Certificate of Preliminary Education – (1000)" to put a check mark in it, and then click on the button below that box labeled, "Include Selected Certification Subject Area(s) in My Application."

- Click on "Continue >>"

- In the last page of the actual application process, "Summary: Application Summary," verify the information on that page, and then scroll to the bottom of the page and click on the two boxes to verify the information.
  - o Once this has been completed, click on the button "Proceed to Submit >>"

- Once the application is submitted, choose the payment option and proceed from there.

- After the payment information is entered, you will be offered the option to "Print Coversheet." You will need to print this cover sheet and then send any supporting paperwork, such as transcripts, foreign transcript evaluations, or GED scores with this cover sheet so that information can be scanned in and attached to your TIMS application.