



# **North Central Library District's Handbook for New Library Directors**

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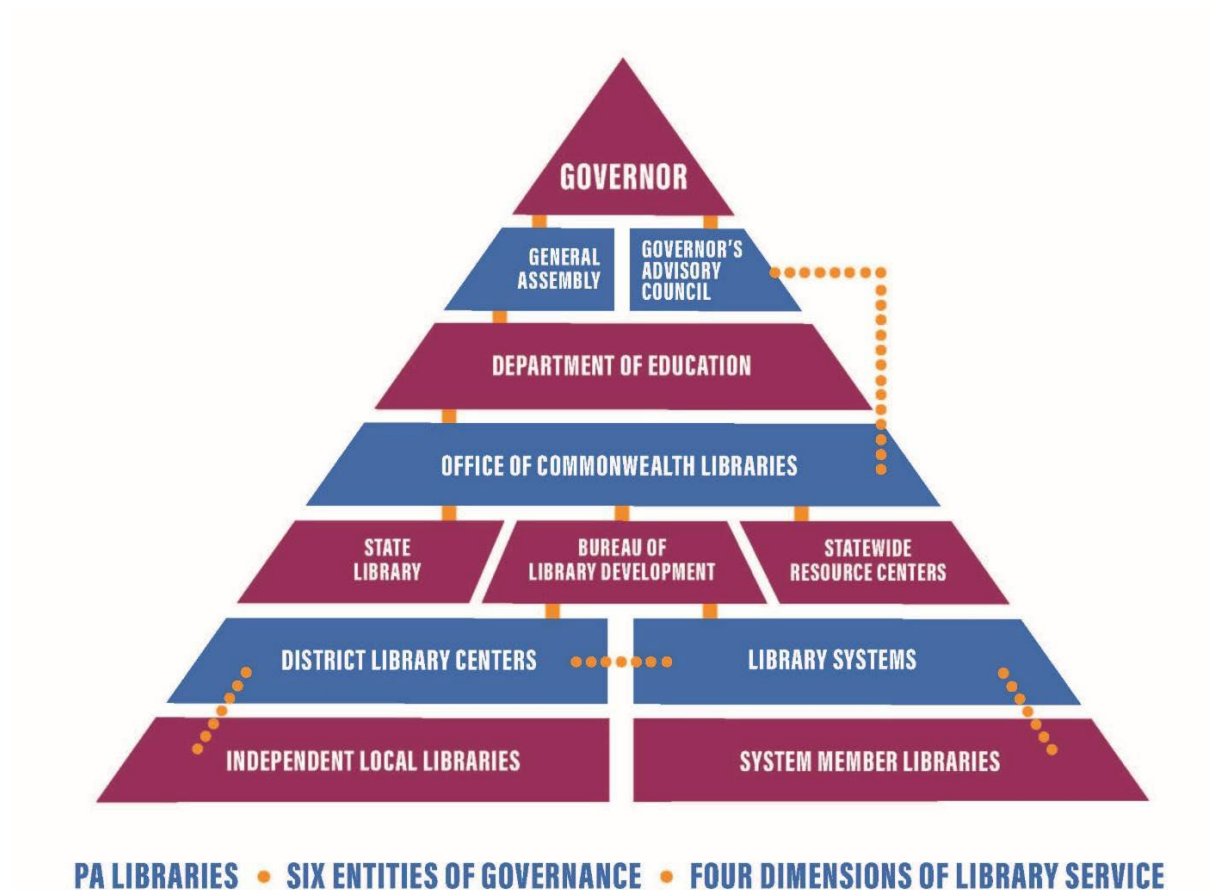
## Introduction

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.

## 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, both physical and digital. A local library's collection development policy will dictate what items are collected. These will include books, magazines, newspapers, audio and video recordings, and computer related materials and digital services. The collection of each local library also includes the

resources available through the state's POWER Library databases and other online resources provided by a library system or the District Center.

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 where applicable, county library systems, each play a role in the success of the local libraries in their geographic areas of responsibilities.

### Libraries with Branches

A main library with branches is considered one library with other physical facilities or outlets. The library may have a Chief Executive Officer, Library Director, and Branch Managers. They are governed by one board. In some cases an advisory board helps to guide the library 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 federated 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.

### District Library Centers

Currently there are 29 District Library Centers in Pennsylvania. The district center is a strong local library (and can 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 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.





## 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 officials 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 employs a full-time youth services consultant who participates in statewide initiatives, develops continuing education opportunities, and who works directly with libraries to improve services to children and young adults.

The District Center provides access to thousands of electronic books and audios through eBranch2Go, powered by Overdrive. You may know this as Libby. All district member libraries have access to eBranch2Go through their web sites. The District Center manages website development and maintenance for each interested member library through a third party partner. The District Center provides postage paid interlibrary loan to all district members as well as collection development 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

Under the leadership of the Deputy Secretary and Commissioner for Libraries, the Office of Commonwealth Libraries 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:

Within the Office of Commonwealth libraries, 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 of Accessible Media for Pennsylvanians, 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 not new, but as of this writing, there are no new regulations to define and shape the code. The work group with members of the Governor's Advisory Council, Pennsylvania Library Association leadership, and the Office of Commonwealth Libraries is in the process of gathering information to rewrite the regulations. The Public Library Code and regulations can be found at the following link:

<https://www.pa.gov/agencies/statelibrary/library-development/library-laws-and-regulations.html>

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 section 9334*)
- 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.
- $\$1.82 \times \text{Population} = \text{Quality Libraries Aid}$ .
- 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.

### 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 (*Library Code section 9335*, [Library Regulations](#))

#### 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.
- Maintain its local government income.

#### 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 9335 (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 9335 (D)*

### 3. County Coordination Aid

- Purpose of aid is to implement a plan for countywide services for county residents.
- Funding is 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.

## 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 70<sup>th</sup> 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.

## Funding

There is no one 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 or some other form of recognition. 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 and 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 chart of accounts)

## 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 \$750,000. 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: <https://pa.gov.libguides.com/c.php?g=1306054&p=10240585>

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. Sometimes these funds are made available to libraries and library systems with projects that fit within the [state's five year plan](#). 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: <https://pa.gov.libguides.com/LSTA>

## E-Rate

The Universal Service Schools and Libraries Program, commonly known as the E-Rate Program, helps ensure that schools and libraries can obtain technology infrastructure 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 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](mailto:jtschell@comcast.net).

## 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.

### 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. For libraries that are members of a system, the service population is 14,999 and under.)
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. For libraries that are part of a system the population is between 15,000 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 [PennWest Clarion](#), [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 but library assistants and provisional library directors may utilize Northampton Community College’s certificate program to gain the needed additional credits in library science.

TIMS/PPID - All applications for librarian certification must be submitted to the Pennsylvania Department of Education through TIMS (Teacher Information Management System). More information can be found in this [LibGuide](#).

## Duties and Responsibilities

- Develops staff job descriptions and is responsible for hiring, evaluating and terminating staff.
- Supervises all employees, encourages continuing education.
- Recommend and draft policies for board action. Carry out adopted policies, delegating to staff as needed.
- Work with board to prepare annual budget
- Serves as a resource for the board, attends all meetings.
- 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.
- Provides leadership role.
- Evaluates operations and activities at the library
- Plans for future needs, develops collections and programs, implements services
- Develops and maintains effective relationships with board, staff, civic groups, government agencies, library stakeholders
- Prepares state reports
- Oversees grant proposals and submissions
- Attends library and professional meetings

## 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 a collaborative 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.

## Personnel

### Job Descriptions

All library employees should have job descriptions that list the essential duties of each position, any education and experience required, 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.

## 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:

<https://northcentrallibraries.org/trustees/>

## 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.

## 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.

## Reporting

### Annual Report – PA Public Library Data Survey

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 Report. This eases the process of reporting to the Commonwealth each year. Annual reports are opened in January and usually due to the district consultant in early March. More information can be found on the [Pennsylvania State Library’s LibGuide](#).

State Aid Library Subsidy Application

The State Aid Library Subsidy Application (SALSA) is typically released in July of each year. This form must be completed in order to receive state aid. The application is a tool that is used to determine a library's eligibility for state aid. More information can be found in this [LibGuide](#).

### Summer Reading Report

Pennsylvania participates in the Collaborative Summer Reading Program. Digital summer reading manuals are provided by the state in the fall of each year. Libraries are requested to complete the summer impact survey after the end of the program each summer.

### 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. More information can be found on this [LibGuide](#).

### 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 third year, with a financial review in the intervening years. Audits or financial reviews are submitted each year with the SALSA.

## 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 responsibility 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 a pdf can be found here: <https://northcentrallibraries.org/wp-content/uploads/2017/08/Getting-on-Board-2012.pdf>

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

## 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.

There are helpful resources on facilities maintenance here:

<https://northcentrallibraries.org/facilities-maintenance-and-disaster-preparedness/>



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/emergency-preparedness>

## 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. The North Central Library District provides website development and maintenance through a third party for those libraries that wish to host with the district.

### 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 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 can recommend products for use in public libraries.

Nearly all public libraries provide wireless access to the Internet for use with patrons' own devices. Acceptable use policies should also cover wifi access. Libraries should have

equipment in place to count the number of wifi sessions annually for the annual report. Many libraries now have hotspots to check out to library patrons.

## 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.
- *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, X, and Instagram accounts are easy to set up and maintain. They provide an effective way to communicate about programs, services, and community events.

## 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. 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 example, 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 support to the designated youth staff personnel. This includes materials and resources needed for creating engaging spaces for youth, developing collections for youth, and having a program supplies budget allocation to support programming in the library and outreach services, as well as providing the work time needed to create, plan, and implement these programs and develop outreach partnerships based on community needs.

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 youth's developmental stage. Every library is unique in how they categorize and group their programming together. The Office of Commonwealth Libraries (OCL) asks for statistics on the annual report on the following age categories for youth programming; birth- age 5, ages 6-11, ages 12-18. A wide variety of programming supporting inclusivity and accessibility is recommended. OCL will ask for the following information on your annual report; live programs, recorded programs, and self-directed or passive programs. When you are gathering and recording your monthly statistics it will be helpful to keep the annual report data needed in mind. ALA also provides a foundation for age ranges for collection and development, programming and spaces for children 0-8, tweens 9-12, and teens 12-18. These are meant to be guidelines, and every community and middle school age categories vary slightly. As the director of your library, you will know how to serve your community best. These are benchmarks to provide support if you need them.

Programming is an essential and core component of library service to children and youth. As part of the Department of Education, Public Libraries should try to align early childhood programming to the Pa Early Learning Standards.

<https://www.pakeys.org/pa-early-learning-initiatives/early-learning-standards/>

These programs are designed for parents/caregivers and children ages 0-5. Providing programming during the optimal and critical brain development years is a recommendation. A child's brain is 90% developed by age 5, and is 70% developed by age 2. All library programming supports a child's social and emotional learning, as well as their academic learning to have the skills they need to succeed in school. Just as early childhood programming should align to Pa Early Learning Standards, tween and teen programming should be developed and aligned to the 40 Developmental Assets of Young Adults, <https://www.search-institute.org/our-research/development-assets/developmental-assets-framework/> and supporting 21<sup>st</sup> Century Skills, <https://www.weforum.org/agenda/2016/03/21st-century-skills-future-jobs-students/>

As a library director, you and your youth staff will have creativity to develop programming and services that pair your community's needs, and staff's strengths to optimize your community programming calendar. The American Library Services for Children (ALSC) has a comprehensive recommendation of competencies for librarians serving children. They can be viewed at

<https://www.ala.org/alsc/edcareers/alsccorecomps>

Use of the public library by children is especially high in the summer when school is out. The library will likely participate in the Collaborative Summer Reading Program. OCL purchases digital Summer Reading Manuals and provides a virtual comprehensive summer reading training supporting the CSLP. Your youth consultant will share when these workshops are scheduled. A purchase code is distributed in the fall to state aided libraries to download their digital manual. These resources are meant to provide support, inspiration or complete turn key program planning during the summer. Additionally, OCL will share a Pa Summer Library Program Showcase that features innovative programming across the state from the previous year. The Office of Commonwealth Libraries also has training materials available on the [PA Library Staff Academy](#). Many of the resources are available to watch at your own time and pace. Your youth consultant will communicate updates on new professional development opportunities when they become available. OCL is always evolving and growing to help you best serve your community. [Promising Practices Libguide](#) provides an overview of the skills and knowledge necessary for youth services professionals to provide excellent library service to youth from birth through age 18. This guide is intended to be a tool for both the staff providing services to youth and teens and the administrators leading the direction of library service. Your youth consultant can provide the most current OCL updates at monthly member virtual meetings, and via email. Please do not hesitate to reach out for help.

### 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. Libraries may develop a Teen Advisory Board, or Teen Leadership Council to help create, plan and facilitate teen programming. A youth-led approach provides opportunities for teens to cultivate leadership skills, and nurture 21st Century Skills (communication, collaboration, creativity, and critical thinking). Many small and rural libraries do not have the staffing capacity to have a specialized teen services librarian. Partnering with other educational and cultural agencies, the school district and your teen patrons is a great place to start building teen services.

Many schools now have student community service programs needed for National Honor Society, or other community-based learning projects. Identify library projects with which students can assist throughout the year to bridge this relationship. Passive, or self-guided programming is another strategy to provide services and engagement opportunities for teens for all sized libraries and staffing capacities. Surveys, talk back boards, informal fun writing prompts and sharing in conversation are other simple strategies you can use to gather teen feedback to build programs and services that they are interested in attending, and developing a collection that they are interested in reading. These strategies can also provide insight as to what kind of engagement spaces they would like the library to offer such as; games, music, makerspaces, charging stations and headphones.

### 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 other items 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 may not 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).

Other services may include book discussion groups, computer classes, employment search support, programs and services targeting older patrons, to name a few. Partnerships with area organizations such as cultural groups, community service organizations, businesses, chambers, economic development, senior centers and others will be beneficial in developing programs for this group.

### 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 statewide databases funded by Library Services and Technology Act funds through the Office of Commonwealth Libraries. 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. Short videos highlighting the databases on Power Library can be found on the [PA Library Staff Academy](#).

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 helpdesk 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 Administrator Amy Resh aresh@jvbrown.edu	<ul style="list-style-type: none"> <li>• Overall leadership and vision for NCLD</li> <li>• Administers district services and resources</li> <li>• Advocates for libraries on the state level</li> <li>• Supervises District Consultant</li> </ul>
District Consultant Tracy Carey tcarey@jvbrown.edu	<ul style="list-style-type: none"> <li>• Consults on wide range of issues</li> <li>• Liaison to the Office of Commonwealth Libraries</li> <li>• Coordinates state initiatives on the local level</li> <li>• Orientation for new library directors</li> <li>• Continuing Education</li> <li>• Strategic planning facilitator</li> <li>• LSTA Grants</li> <li>• Keystone grants</li> <li>• Manages district resources</li> </ul>
IT Help	

Douglas Harkness dharkness@jvbrown.edu	<ul style="list-style-type: none"> <li>• Consults on technology issues, trends and solutions</li> <li>• Hands on troubleshooting</li> </ul>
Youth Services Consultant Nina White nwhite@jvbrown.edu	<ul style="list-style-type: none"> <li>• Consultation to member libraries in the area of baby, toddler, youth, tween and teen services</li> <li>• Coordinates PA One Book campaign</li> <li>• Collection development tools and resources</li> <li>• Continuing education</li> </ul>
Web Site Administration Contact Doug Harkness dharkness@jvbrown.edu	<ul style="list-style-type: none"> <li>• Web site development</li> <li>• Website maintenance</li> <li>• web hosting and domain name renewals</li> </ul>
Cataloging Assistance Marci Hubler mhubler@jvbrown.edu	<ul style="list-style-type: none"> <li>• Cataloging assistance</li> <li>• Advises on system migrations</li> <li>• Continuing education</li> <li>• OCLC: Cataloging and ILL tool</li> </ul>
Interlibrary Loan Jennifer Heimbach jheimbach@jvbrown.edu	<ul style="list-style-type: none"> <li>• Processes ILL requests from district members</li> <li>• Mails ILLs</li> <li>• The District Center's print collection is available postage free through interlibrary loan</li> </ul>
Reference librarian Robbin Degeratu rdegeratu@jvbrown.edu	<ul style="list-style-type: none"> <li>• Manages collection development for District Center</li> <li>• Answers reference questions</li> <li>• Consults on collection policy decisions</li> </ul>
AV/Media Specialist Wendy Durant wdurant@jvbrown.edu	<ul style="list-style-type: none"> <li>• E books and audio collection development and maintenance of Overdrive</li> <li>• Assists with technical problems and questions</li> </ul>
Financial Officer Kristin Caringi kcaringi@jvbrown.edu	<ul style="list-style-type: none"> <li>• 5 year financial projections</li> <li>• Consults on financial issues</li> </ul>

A directory of district libraries may be found at the following link:  
<http://northcentrallibraries.org/ncl-d-directory/>

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

## Sources

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## Appendix

### Sample Chart of Accounts

41000	Federal Income	Revenue
41100	Federal Income - Other	Revenue
42000	State Income	Revenue
42100	State Aid	Revenue
42200	State Income - Other	Revenue
43000	Local Government Income	Revenue
43100	Township/Municipality Name #1	Revenue
43200	Township/Municipality Name #2	Revenue
43300	School District	Revenue
43400	County	Revenue
43500	Local Government Income - Other	Revenue
44000	Library Generated Income	Revenue
44100	Copies/Prints	Revenue
44200	Fines	Revenue
44300	Non-resident Fees	Revenue
44400	Lost/Damaged Books	Revenue
44500	Rentals	Revenue
44600	Merchandise	Revenue
44700	Library Generated Income - Other	Revenue
45000	Donations and Fundraising	Revenue
45100	Donations	Revenue
45110	Honors/Memorials	Revenue
45120	Businesses	Revenue
45130	Annual Letter Campaign	Revenue
45140	Donations - Other	Revenue



45200	Friends of the Library	Revenue
45300	Fundraising	Revenue
45310	Fundraising Event Name #1	Revenue
45320	Fundraising Event Name #2	Revenue
45330	In house Fundraisers (used book sales, pencils, bookmarks, etc.)	Revenue
45340	Fundraising - Other	Revenue
46000	Grants and Trusts	Revenue
46100	Grants	Revenue
46110	Dollar General	Revenue
46120	United Way	Revenue
46120	Grants - Other	Revenue
46200	Foundations	Revenue
46300	Trusts	Revenue
47000	Other Income	Revenue
47100	Interest	Revenue
47200	Miscellaneous	Revenue
51000	Personel	Expense
51100	Salaries/Wages	Expense
51110	Gross Pay	Expense
51120	Salaries/Wages - Other	Expense
51200	Benefits	Expense
51210	Social Security	Expense
51220	Medicare	Expense
51230	Workers Comp	Expense
51240	PA Unemployment Tax	Expense
51250	Benefits - Other	Expense
51300	Personel - Other	Expense
52000	Collection Expenditures	Expense
52100	Print Materials	Expense
52110	Adult	Expense
52121	Fiction	Expense
52122	Non-fiction	Expense
52123	Large Print	Expense
52124	Adult - Other	Expense
52120	Juvenile	Expense
52121	Easy	Expense
52122	Fiction	Expense
52123	Non-fiction	Expense
52124	Juvenile - Other	Expense
52130	Young Adult	Expense
52131	Fiction	Expense
52132	Non-fiction	Expense
52133	Young Adult - Other	Expense
52140	Reference	Expense
52150	Periodicals	Expense

52200	Electronic	Expense
52210	eBooks	Expense
52220	eAudio	Expense
52230	Electronic - Other	Expense
52340	Other Collections - Other	Expense
52310	Audio	Expense
52320	DVD	Expense
52330	Kits	Expense
52340	Other Collections - Other	Expense
52400	Internet	Expense
52410	Connection Fees	Expense
52500	Library Supplies	Expense
52510	Library supplies	Expense
52600	Collection Expenditures - Other	Expense
53000	Other Operating Expenditures	Expense
53100	Contracted Services	Expense
53110	Audit/Finanical Review	Expense
53120	Accounting/Payroll	Expense
53130	Custodial Services	Expense
53140	Access PA	Expense
53150	Contracted Services - Other	Expense
53200	Furniture/Equipment	Expense
53110	Computers	Expense
53220	Copier/Printer Lease	Expense
53230	Furniture	Expense
53240	Furniture/Equipment Other	Expense
53300	Utilities	Expense
53310	Electric	Expense
53320	Gas	Expense
53340	Water & Sewer	Expense
53350	Telephone	Expense
53360	Utilities - Other	Expense
53400	Facilities	Expense
53410	Snow Removal	Expense
53420	Landscaping	Expense
53430	General Maintenance	Expense
53440	Facilities - Other	Expense
53500	Programs & Marketing	Expense
53510	Advertising & PR	Expense
53520	Programs	Expense
53521	Adult	Expense
53522	Children	Expense
53523	Young Adult	Expense
53524	Summer Reading	Expense

53525	Programs - Other	Expense
53600	Professional Development	Expense
53610	Travel	Expense
53620	Continuing Education	Expense
53630	Professional Membership Dues	Expense
53631	PaLA	Expense
53632	Chamber of Commerce	Expense
53633	Professional Membership Dues - Other	Expense
53640	Travel & Meetings - Other	Expense
53700	General Expenses	Expense
53710	Office Supplies	Expense
53720	Postage, Mailing Service	Expense
53730	Bank Fees	Expense
53740	Insurance	Expense
53750	General Expenses - Other	Expense
54000	Cost of Raising Funds	Expense
54100	Postage	Expense
54200	Printing/Copies	Expense
54300	Games of Chance License	Expense
54400	Cost of Raising Funds - Other	Expense

## 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 an 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

## 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, 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 in select appropriate database for their searches

### **Software Skills**

☒ Word Processing

☒ Spreadsheets

☒ Slide Presentations

- \_\_\_ 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 accessibility needs for patrons (increase text size)
- \_\_\_ Know how to use specialized software for accessibility for 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** – District Negotiations documents due

**July** – State Aid Library Subsidy Application opens. County Coordination Plans are now encompassed in the SALSA

**October** – State Aid Library Subsidy Applications due

**November** – Plans for the Use of State Aid due