

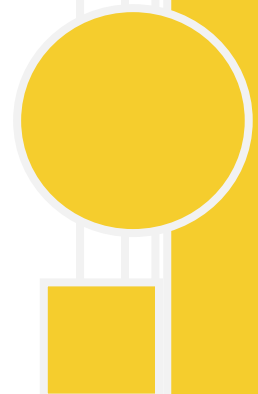
An Introduction to the  
**Montana Library  
Community**  
*with Trustee Al Logan*

Facilitator's Guide



Joann Flick & Tracy Cook, Montana State Library

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# AN INTRODUCTION TO THE MONTANA LIBRARY COMMUNITY

With Library Trustee, Al Logan

## Overview:

This 22 minute video introduces public library trustees to several important statewide initiatives that support the mission of local public libraries. The video is divided into three distinct segments:

1. Viewers meet State Librarian Jennie Stapp and learn about the statutory obligation of the State Library to support the public library system in Montana. Jennie explains how the State Library is governed and organized and she outlines some of the major projects and programs to serve the information needs of all Montanans.
2. Brett Allen is director of the Fairfield Public Library and coordinator of the Pathfinder Federation. Federations provide the funding mechanism to distribute Coal Severance Tax funds to local public libraries and they serve as regional support institutions. Library trustees hold the votes at federation meetings so it is trustees that determine how those public dollars are spent.
3. The Montana Library Association is the professional organization for all library staff and trustees in Montana. Membership is voluntary, but trustees reap important benefits. In this segment, Anne Kish, president of MLA, explains what MLA provides.

By viewing this video and completing the activities listed in this guide, library staff, volunteers, and especially trustees will achieve the following outcomes:

- Identify key institutions in Montana that provide critical services to public libraries
- Gain a clear understanding of the statewide initiatives that may improve patron services at their local library
- Know who to contact for more information
- Be prepared to take informed action on participation of a local library in a statewide initiative

Trustees and library staff or volunteers that view this video and complete the activities described in this guide **earn two continuing education credits** in the category of Library Administration.

## How to use this video:

- View the video with a group, if at all possible. In a group, viewers can relate the content in the video to the experience found in the group.
- Do not view the full video at one time. Instead, view one segment at a time and complete the suggested activities. By taking a break from viewing to do the activities in this guide, viewers will gain a deeper understanding of the key concepts presented. **CE Credit is available only if both viewing and activities are completed.**
- Before viewing each segment, take 10-15 minutes to lead a discussion to prepare for viewing. You can follow the suggestions in this guidebook, or prepare your own discussion topic. The purpose of the discussion is to prepare for *active viewing*: looking for key points and new information; investigating.
- Wrap up the previewing discussion by providing a specific task to keep viewers active during viewing.
- Be prepared to pause the video frequently if something comes up that the group wants to discuss or have clarified. Keep the remote control handy!
- Provide a copy of the handouts found at the end of this guide to everyone viewing the video.
- This guide contains important details that could not be included in the video. Follow along with this guide and complete the activities as you view each segment.

# THE MONTANA STATE LIBRARY

Jennie Stapp, Montana State Librarian

**Before viewing** this segment, take a moment to discuss what is already known about the Montana State Library and the services it provides to public libraries. Create a list.

**During the video**, make notes about services that Jennie Stapp mentions. Be prepared to discuss how these services may be of value to your local library. This video is about 10 minutes long and there is a lot of information in it. Remind viewers that you can pause anytime to clarify or review information.

**Following the video**, discuss the services Jennie mentions. Was there anything new? Add to the list created before viewing the video.

Continue the discussion by taking time to review the language of the laws in the Montana Code Annotated (MCA) and the Administrative Rules of the State of Montana (ARM) related to the State Library's authority (find these in the handouts at the end of this guide). Discuss how the information presented by Jennie could be helpful to the operation of your library.

- Is this information surprising?
- Does it confirm and support what you already do?

Make notes about what further information trustees may want to expand on in their understanding of the Montana State Library's role. Contact a library consultant or a member of the MSL staff for additional training.

Visit the MSL website and complete the tasks assigned in the sidebar:

## [msl.mt.gov](http://msl.mt.gov)

- find the documents for a commission meeting under "About MSL"
- under "Services to Libraries" click on "Statewide Library Resources" and "Library Development"
- in "Library Development" click on "Consulting" and explore the information available for trustees
- find the Trustee Manual under "Board Development"
- in "Library Development" click on "Library Directory" in the right menu and look up info on your library
- in "Library Development" find the Public Library Standards

# LIBRARY FEDERATIONS

Brett Allen, Past Pathfinder Federation Coordinator and  
Director, Fairfield Public Library

**Before viewing:** Discuss member organizations that trustees may already be familiar with such as buying groups or professional organizations. Ask if anyone is a member of AAA, a farmer's or rancher's coop, Grange, a volunteer firefighter organization, a local chamber of commerce or maybe even a participant in Bountiful Baskets. Discuss how member organizations or co-ops like this can sometimes achieve economies of scale or otherwise provide important services which an individual company or person cannot easily achieve on their own. In this context, explain that in Montana, six federation regions are set up to serve local public libraries and that the next segment introduces the federation system.

**During viewing:** Listen carefully for information about the roles and services provided by your library's federation, and jot down questions you have about the federations.

**After viewing:** Discuss any questions that came up during the video. Refer to the Montana State Library Federation Handbook online at [http://msl.mt.gov/Library\\_Development/Consulting/Federations/Notebook/default.asp](http://msl.mt.gov/Library_Development/Consulting/Federations/Notebook/default.asp)

Discuss the operation and leadership of your library federation:

- Where and how often do you meet?
- Who is the coordinator?
- What is your *Plan of Service*?
- At your federation meetings, what are the key issues that often come up?

- **How is your federation spending these funds?**
- **How do these funds benefit your library?**

The handout for this section explains in more detail the funding formula found in the Administrative Rules of Montana and outlines the limitations on how Coal Severance Tax moneys may be allocated. Are there other uses of the funding that might be more beneficial to your library and the region?

# MONTANA LIBRARY ASSOCIATION

Anne Kish, MLA Past President (2012-13), Montana State Library Commissioner, and Librarian, University of Montana Western

**Before viewing:** Discuss experiences that library board members may have had with professional organizations. Consider the Montana Educator’s Association, the American Medical Association or others. What important roles do these organizations play in the profession? What should a professional organization do? Avoid discussing specific activities, instead focusing on the broader roles of professional organizations. Direct the discussion to include:

- Promote ethical behavior
- Continuing education
- Research and publication to further the knowledge base of the profession
- Public information
- Advice to advance the profession
- Advocate for public policy

Make a list of these roles and services provided by professional organizations. You’ll come back to the list after viewing the video.

In this final segment, trustees will meet Anne Kish 2012-13 president of the Montana Library Association. Anne discusses the value of MLA to librarians and trustees of libraries in Montana.

**During viewing:** Look for those specific activities of MLA that relate to the list the group created before watching the video.

**After viewing:** Distribute copies of the handout on MLA found at the end of this guide. Take time to review the information in the handout and add any other MLA activities they may have missed from the video but noted from the handout. Have viewers write the activities they noted onto sticky note papers and paste next to the roles listed previously on the chart. If an activity is listed that does not fit any of the roles on the chart, discuss if there is an additional role of a professional organization that they may have overlooked. Add to the list if necessary. Given that the group established these roles that professional organizations should play, ask them, “Is MLA addressing the appropriate roles of a professional organization?” What did they learn about MLA that was new? Add more information from the MLA Website or from experiences that library staff may have had as members. Discuss membership, or consider participating in an MLA-sponsored activity.

“\$15? That’s an incredible buy!”  
– Al Logan

reacting to the membership fee for trustees to join MLA

# HANDOUTS

The handouts provide vital information that could not be covered in the videos. While the information is supplemental, it is very important. The handouts are used to facilitate discussion and as reference material to take home. At the top of each handout is a notation indicating which video that handout was created to support.

- Print a copy of each handout for everyone viewing the video
- Distribute the designated handouts as each segment is viewed

For video segment: [Montana State Library - Jennie Stapp](#)

## STATE LIBRARY COMMISSION AUTHORITY

The Montana Code Annotated (MCA) contains several provisions related to public libraries in Montana. You'll find a complete list of related law here:

[http://libraries.msl.mt.gov/Home/library\\_development/consulting/library\\_law](http://libraries.msl.mt.gov/Home/library_development/consulting/library_law)

Here is the section that covers the authority of the State Library Commission.

### **MCA Title 22-1-103(1)**

- (1) give assistance and advice to all tax-supported or public libraries in the state and to all counties, cities, towns, or regions in the state that propose to establish libraries, as to the best means of establishing and improving those libraries;
- (2) maintain and operate the state library and make provision for its housing;
- (3)(a) accept and expend in accordance with the terms of a grant any grant of federal funds that is available to the state for library purposes;
- (b) accept, receive, and administer any gifts, donations, bequests, and legacies made to the Montana state library. Unless otherwise provided by the donor, gifts, donations, bequests, and legacies must be deposited in the Montana state library trust established in 22-1-225.
- (4) make rules and establish standards for the administration of the state library and for the control, distribution, and lending of books and materials;
- (5) serve as the agency of the state to accept and administer any state, federal, or private funds or property appropriated for or granted to it for library service or foster libraries in the state and establish regulations under which funds must be disbursed;
- (6) provide library services for the blind and for individuals with physical disabilities;
- (7) furnish, by contract or otherwise, library assistance and information services to state officials, state departments, and residents of those parts of the state inadequately serviced by libraries;
- (8) act as a state board of professional standards and library examiners, develop standards for public libraries, and adopt rules for the certification of librarians;
- (9) designate areas for and establish federations of libraries.



For video segment Montana State Library: Jennie Stapp

## MONTANA STATE LIBRARY

Contact information:

**Jennie Stapp, Montana State Librarian** [jstapp@mt.gov](mailto:jstapp@mt.gov)

**Sarah McHugh, Director of Statewide Library Services** [samchugh@mt.gov](mailto:samchugh@mt.gov)

**Cara Orban, Statewide Projects Librarian** (MT Library2Go, Databases, DiscoverIt! search tool) [corban@mt.gov](mailto:corban@mt.gov)

**Ken Adams, Montana Shared Catalog** [kadams@mt.gov](mailto:kadams@mt.gov)

**Jo Flick, Continuing Education** [jflick@mt.gov](mailto:jflick@mt.gov)

**Jennifer Birnel, Montana Memory Project** [jbirnel@mt.gov](mailto:jbirnel@mt.gov)

**Christy Briggs, Montana Talking Book Library** [cbriggs@mt.gov](mailto:cbriggs@mt.gov)

**Jim Kammerer, Library Information Services** (for professional development books for libraries) [jkammerer@mt.gov](mailto:jkammerer@mt.gov)

**Library Consultants:**

- **Lauren McMullen** [lmcmullen2@mt.gov](mailto:lmcmullen2@mt.gov)
- **Suzanne Reymer** [sreymer2@mt.gov](mailto:sreymer2@mt.gov)
- **Pamela Henley** [phenley2@mt.gov](mailto:phenley2@mt.gov)

For video segment [Library Federations: Brett Allen](#)

## FEDERATIONS PLAN OF SERVICE – ADMINISTRATIVE RULES OF MONTANA (ARM)

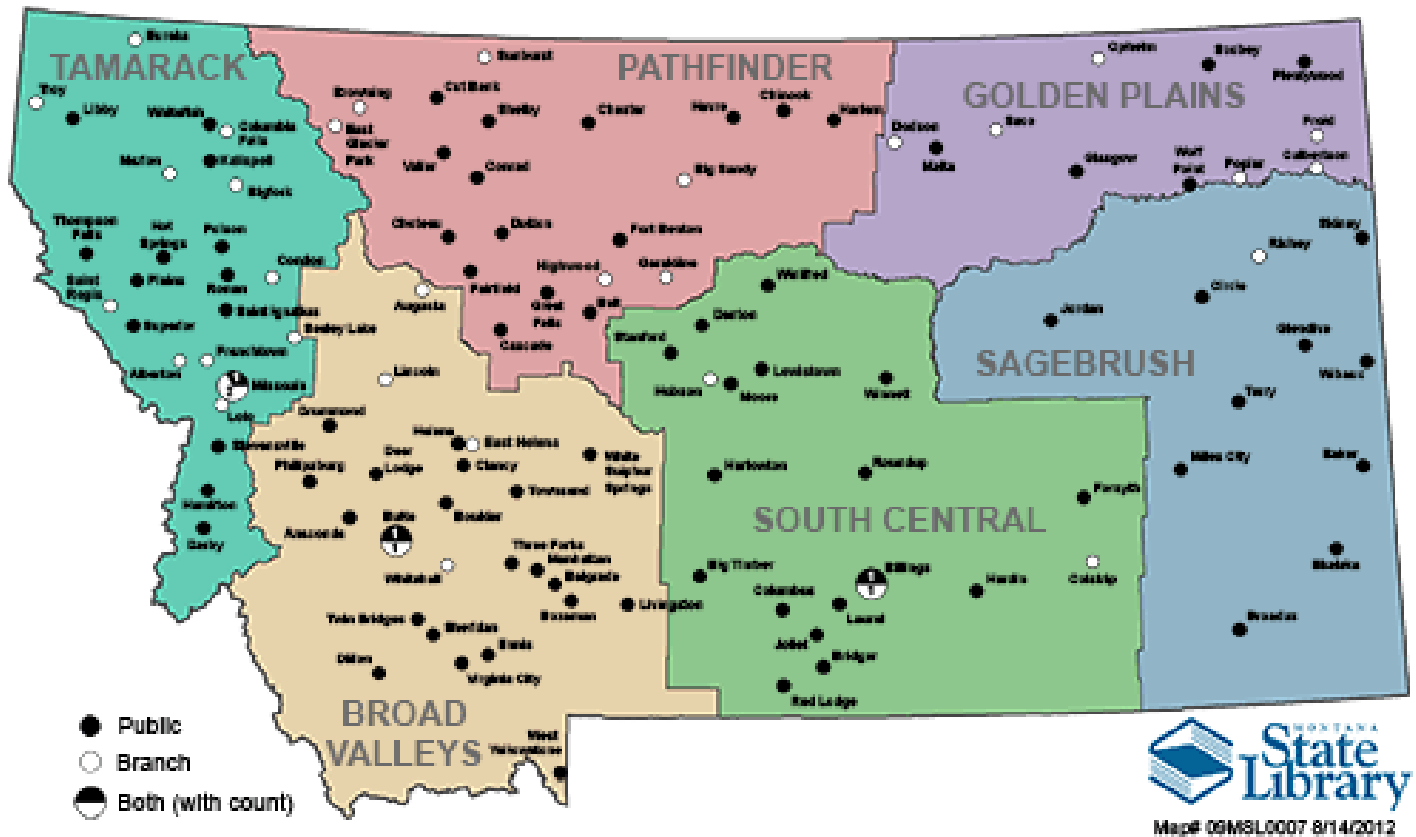
### [10.102.5102](#) ALLOCATION OF FUNDING BETWEEN FEDERATIONS AND GRANT PROGRAMS

annotated

- (1) ... the commission shall allocate all funds received to library federations according to the following formulas:
  - (a) Before funds are allocated among federations, the travel expenses for federation coordinators will be estimated and subtracted off the top of the funds federations receive. Each federation will receive travel funds for its coordinator. The remaining portion of the appropriation allocated to library federations shall be distributed among the six federations according to the following formula: 50 percent of the first \$250,000 shall be divided equally among the six federations and 50 percent shall be allocated on the basis of population within the six federations.
  - (b) Any appropriation in excess of \$250,000 shall be divided according to the following formula: 20 percent of the remainder shall be allocated equally among the six federations. 80 percent of the remainder shall be allocated among the six federations on the basis of population.
- (2) The state library commission has the responsibility and authority to approve **federation plans of service** and to approve or deny funding for the components of the plans of service.
  - (a) <Plans of service must be approved before funds allocated.>
  - (b) <Following approval, funds are allocated.>
  - (c) The state library commission can disapprove a plan of service only because:
    - (i) it was not prepared according to the procedures and forms established by the state library commission; or
    - (ii) it does not address the authorized purposes and/or priorities as established by the state library commission to implement its state long range plan for libraries.
- (3) Each federation's annual plan of service shall be based upon direction given by the state library commission from its consideration of the state long range plan for libraries. The annual plan of service is submitted to the state library each spring for consideration and action by the state library commission. Changes or appeals related to the plans of service are acted upon by the state library commission in May and June of each year.
- (4) <Libraries> shall expend the federation funds according to the purposes stipulated in the federation's plan of service. <Annual reports required.>
- (5) <Return of funds allocated, if not used in accordance with ARM>
- (6) Federation rules must include plan for equal representation of libraries, proxy voting, etc.
- (7) Appeals process.

For video segment Library Federations: Brett Allen

## MONTANA FEDERATIONS



TAMARACK

BROAD VALLEYS

PATHFINDER

SOUTH CENTRAL

GOLDEN PLAINS

SAGEBRUSH

For video segment *Montana Library Association: Anne Kish*



# Montana Library Association

*Montana's Libraries from the Mountains to Plains*

MEMBERSHIP INFORMATION AND ACTIVITIES OF MLA – [MTLIB.ORG](http://MTLIB.ORG)

## Conference Schedule:

**February** (usually) **OffLine** – a midwinter technology conference designed to get library staff away from their computers (hence the name, OffLine) to discuss and learn about the greater impacts technology is having on the world of libraries; a chance to share experiences and consider new horizons.

**April Annual Conference** – Librarians from public, school, academic and special libraries converge for author talks, keynotes, and lots of member-generated concurrent sessions. Interest groups meet to work on issues, and the leadership of MLA is recast for the coming year. An exhibit area allows librarians to meet with vendors and to learn about services of interest from other agencies in Montana.

**October PLD/ASLD** retreat for public library directors and academic/special library directors, held at Chico Hot Springs. The Fall retreat is a small gathering with professional development focused on the issues most relevant to public, academic, and special libraries in Montana, hosted and planned by these two divisions.

**October MEA-MFT hospitality suite** – MLA sponsors a hospitality suite for school teacher-librarians at the annual MEA-MFT conference which attracts hundreds of K-12 educators from across Montana. The suite promotes networking and collaboration.

## Montana Library Association Governance:

### Divisions:

- Academic and Special Library Division
- Public Library Division
- School and Library Media Division

### Committees:

Awards & Honors Book Store Budget Bylaws Cates Scholarship Communications, Finance & Nominating Conference Planning	Executive Government Affairs Intellectual Freedom Marketing & Public Relations Membership Professional Development
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### Interest Groups:

Children & Youth Services Health Sciences Interlibrary Loan Nargis Library Recovery	OffLine Public Library Directors Technical Services Trustees
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