AGENDA
Library Board
5:00 PM - Monday, February 17, 2025
Library, 1101 6th Avenue

This meeting is being recorded.

Page

CALL TO ORDER

AGENDA APPROVAL

Motion to approve agenda as presented.

INTRODUCTION OF GUESTS

Kara Bullerman - City Attorney presentation/training on Open Meetings

PUBLIC FORUM

This time is set aside for comments from the public. Please understand that the Library Board of Trustees will not take any action on your comments at this time due to requirements of the Open Meetings Law but may do so at a future meeting.
You will have five minutes to address the Board.

MINUTES

Motion to approve the January 2025 Meeting minutes.   3 - 6
Library-Minutes-January 20 2025 DRAFT

REPORTS

Friends of the Marion Public Library Report

Marion Public Library Foundation Report   7
MPL Foundation Report for Trustees Meeting 02-17-2025

Board Continuing Education

Art Advisory Committee Report

Finance Committee Report

Personnel Committee Report

Director's Report
- Budget Update
- Statistics Highlights
- Strategic Plan Update
- General Department Updates
- MLN Updates

[Directors Report February 17 2025](#)
[Budget Performance Report January 2025 FINAL](#)
[Open PO Report - January 2025](#)

Policy Committee Report
- Children's Interactive Learning Area Behavioral Guidelines Policy
- Meeting Room Policy
  - Meeting Room Policy Agreement
- Study Room Policy
- Supplemental Personnel Policies
  - Dress Code Policy
  - Meal and Break Policy
  - Professional Development Policy
  - Working from Home Policy

[Childrens Interactive Learning Area Behavioral Guidelines Policy 2-2025](#)
[Meeting Rooms Policy 2-2025](#)
[Meeting Rooms Policy Agreement 2-2025](#)
[Study Room Policy 2-2025](#)
[Dress Code - Supplemental Personnel Policy 2-2025](#)
[Meal and Break Policy - Supplemental Personnel 2-2025](#)
[Professional Development - Supplemental Personnel Policy 2-2025](#)
[Working from Home - Supplemental Personnel 2-2025](#)

Motion to accept all reports as presented. (Action requested)

REGULAR AGENDA

1. State Library Board of *Trustees Handbook* - Ch. 10 (Discussion)
   [Ch. 10 - Iowa Library Trustee's Handbook_ 2021 Edition](#)

2. City Council Liaison (Discussion and direction requested)

3. Ad hoc committee discussion regarding staff appreciation (Action requested)

ADJOURN

MINUTES
Library Board
5:00 PM - Monday, January 20, 2025
Library, 1101 6th Avenue

Minutes are in draft format until approved at the next meeting

The Library Board of the City of Marion, Linn County, Iowa met on Monday, January 20, 2025, at 5:00 PM, with the following members present:

PRESENT:	In Person: Susan Kling, Jack Zumwalt, Sandy Rosenberger, Cara Briggs Farmer, Ross McIntyre, Melissa Alexander, Kelsey Logan, Nancy Miller, Bob Hoyt, Becky Garms Via Zoom: Kim Rose, Chelsea Nunn
ABSENT:	Okpara Rice
STAFF PRESENT:	Bill Carroll, Kimberly Cowger, Allyson Lindgren
FRIENDS REP:	Jan Dickinson
GUESTS PRESENT:	Nick Tharalson

CALL TO ORDER
The meeting was called to order at 5:00 p.m. by Board President, Ross McIntyre.

AGENDA APPROVAL
Motion to approve agenda as presented.

Moved by Logan, seconded by Kling, to approve the agenda as presented.
Approved unanimously

INTRODUCTION OF GUESTS

PUBLIC FORUM
This time is set aside for comments from the public. Please understand that the Library Board of Trustees will not take any action on your comments at this time due to requirements of the Open Meetings Law but may do so at a future meeting.
You will have five minutes to address the Board.
- Nick Tharalson voiced a complaint that library closing announcements need to be posted in more areas than just Facebook.

MINUTES
Motion to approve the December 2024 Meeting minutes.

Moved by Briggs Farmer, seconded by Rosenberger, to approve the December 2024 Meeting Minutes.
Approved unanimously

REPORTS

Friends of the Marion Public Library Report
- Jan Dickinson reported that the Friends Board did not meet in December.
- There are 950 children currently enrolled in Dolly Parton Imagination Library (DPIL).
- The next Friends Book Sale will be April 4-6, 2025.

Marion Public Library Foundation Report
- Hilery Livengood submitted a Foundation Report for Board Members as she was absent for this meeting.

[MPL Foundation Report for Trustees Meeting 01-20-2025](#)

Board Continuing Education
- None to report.

Art Advisory Committee Report
- Next meeting set for later in January.

Finance Committee
- Next meeting should be scheduled in February.

Personnel Committee Report
- No report.

Director's Report
- Budget Update - Expenses for the year are right at 50%. Revenues are at 79%.
  The City will have a Budget Retreat on January 31 and February 1 to discuss FY26 Budget.
- Strategic Plan Update - Library Management is working on a Plan of Service to be our road map for goals in 2025. MPL will take part in a Corridor Libraries Staff Training Day on February 20. Board members will be invited to attend the morning Author session.
- General Department Updates - There is uneven sidewalk near the Library's North entrance. Signs and yellow tape have been put down as a precaution until a permanent fix can be made in the Spring.
  Bush Construction has been contacted about the Terrace Roof leak.

Policy Committee Report
- Policy Committee did not meet

Motion to accept all reports as presented. (Action requested)

Moved by Alexander, seconded by Zumwalt, to accept all Reports as presented.
Approved unanimously

REGULAR AGENDA

1. State Library Board of *Trustees Handbook* - Ch. 9: Board Relationships with Director,

Staff, and City (Discussion)

- Jack Zumwalt mentioned that staff surveys were done in the past. Bill Carroll said that can be done, but must go through City HR, much like the survey done for Bill's annual review with the Personnel Committee.
- Susan Kling asked if Board Members should be attending City Council Meetings. Bill Carroll said they could and/or perhaps a City Council Member should attend Library Board Meetings.

2. Purchase Order/Contract Approval (Action Requested)

- A three year contract with Baker & Taylor was discussed for the Collection HQ, a collection development tool that improves efficiency at the Library with regard to collection development.
- The cancelation of low performing Databases allows room for this in the budget.

Moved by Rosenberger, seconded by Briggs Farmer, to approve the Purchase Order/Contract with Baker & Taylor for Collection HQ.
Approved unanimously

3. MPL Foundation Board Meeting (Action Requested)

- Sign-up sheet was sent around for Board Members to attend MPL Foundation Board Meetings.

New Business

- Discussion was had about the Board doing something for Staff appreciation during Library week in April. Formal action will take place at the next Board Meeting.

ADJOURN

Moved by Zumwalt, seconded by Alexander, to adjourn at 5:38 p.m.
Approved unanimously

Respectfully submitted by:
Kimberly Cowger, Administrative Assistant

Marion Public Library Foundation

January 2025 report to Board of Trustees

- December donations: $22,370.00

- Year-end solicitation sent to 187 households. To date, $6,970 raised. Thank you to the six trustees who participated!

- Capital campaign pledge balance as of 1/8/25, $88,075.17.

- Preparing to submit grant for the National Endowment for the Arts' "Big Read" program. The grant supports community reading programs designed around a single book, an objective on the library's strategic plan. Programming for the 2025-26 grant cycle will center around the theme *OUR NATURE: How Our Physical Environment Can Lead Us to Seek Hope, Courage, and Connection*. Awards range from $5,000 to $20,000 and require a match. The letter of inquiry deadline is January 23, 2025, and the full grant application is due January 30, 2025.

Marion Public Library Foundation

February 2025 report to Board of Trustees

- Fundraising for the bookmobile opening collection continues. To date, $51,504.07 has been raised of the $70,000 goal.

- Hills Bank presented to the MPL Foundation Board of Directors on the history of the Foundation's funds and the board-approved investment policies.

- The Foundation's biennial report has been filed with the State of Iowa.

- In consultation with Bill Carroll and Sue Gerth, opted to pause on the National Endowment for the Arts' "Big Read" program. This is related to the shortages in the programming staff. We will consider this next year.

- Capital campaign pledge balance as of 1/28/25, $83,075.17.

Director's Report for the Library Board of Trustees Meeting on Monday, February 17, 2025

Budget Update:

- The current fiscal year has lapsed approximately 58.3% through January 31, 2025.
- As of the January 31, 2025 budget report, approximately 57% of the library's budget has been expended for the year.
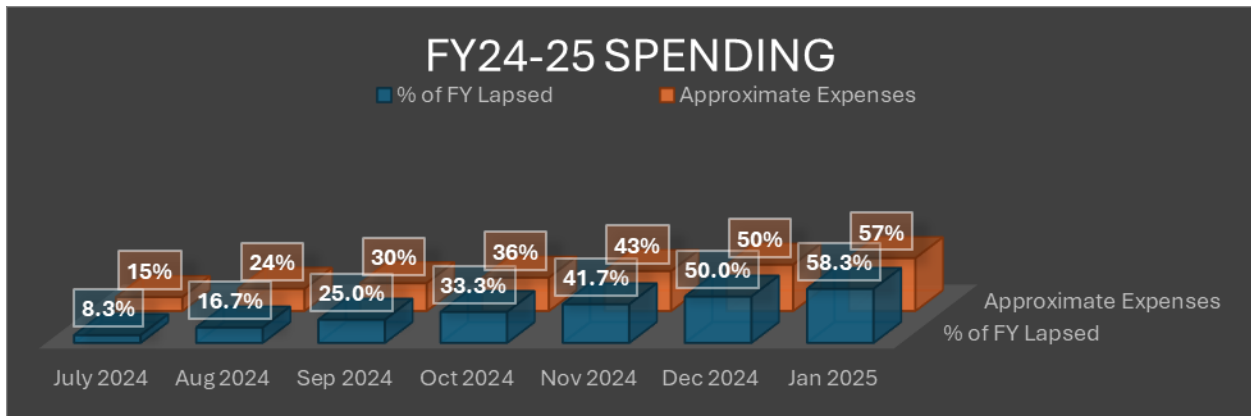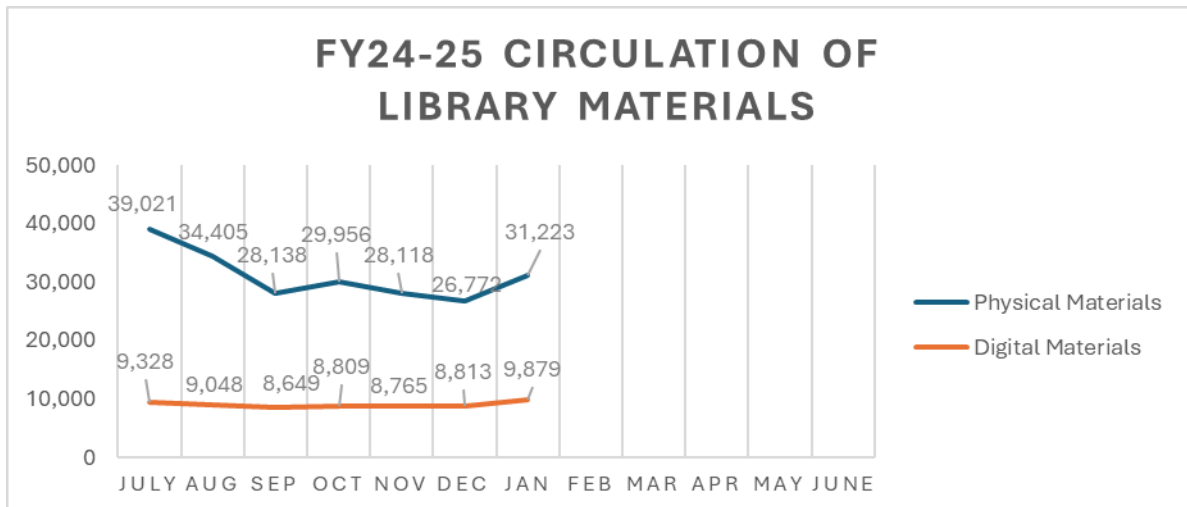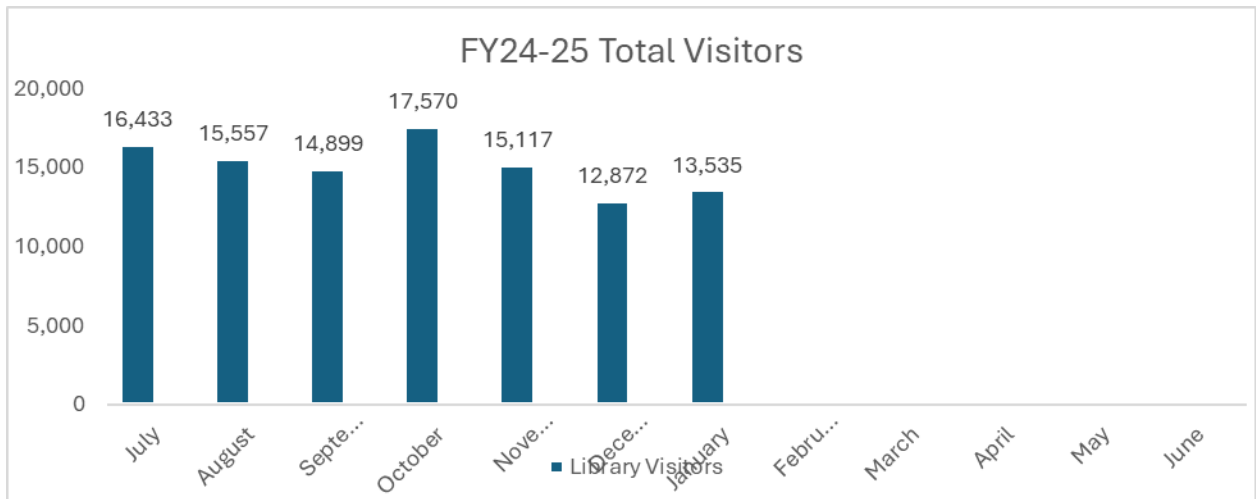

- As of the January 31, 2025 budget report, revenue received increased to approximately 85% received for the fiscal year.
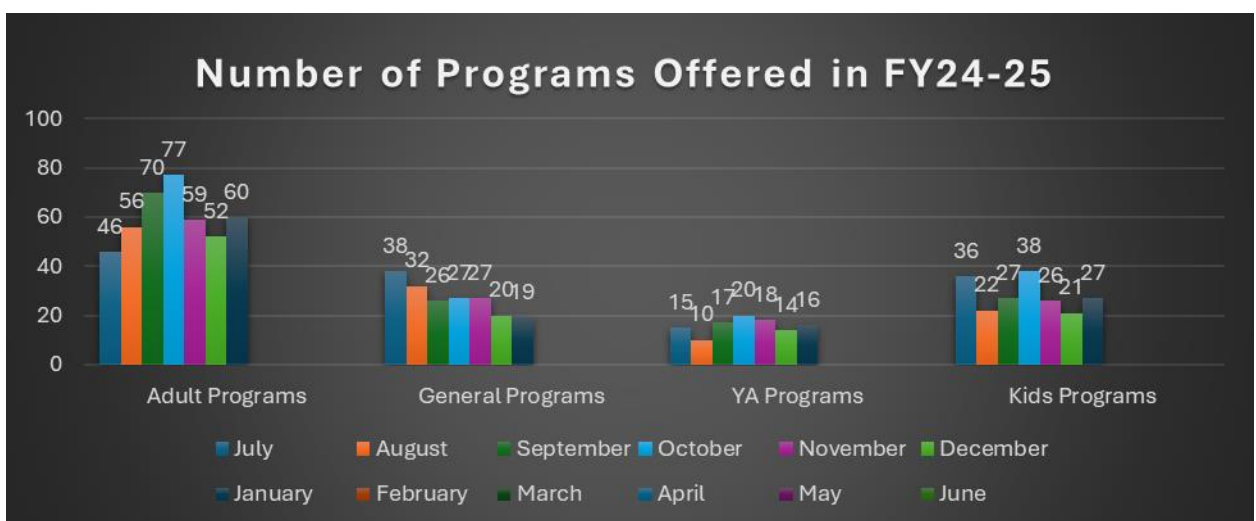
Statistics Highlights:

- For January 2025, circulation of physical items increased approximately 16.6% from the previous month, having 31,223 items checked out. Circulation of physical items for the month decreased approximately 2.3% when compared with the previous year.
- For January 2025, circulation of digital items increased approximately 12.1% compared to the previous month. Circulation of digital items for the month decreased approximately 0.4% when compared with the previous year.

FY24-25 Total Visitors

Month	Library Visitors
July	16,433
August	15,557
September	14,899
October	17,570
November	15,117
December	12,872
January	13,535

- The gate count for January 2025 was 13,535. The January gate count was approximately 5.2% higher than December 2024. Compared with the previous year, the gate count was approximately 1.4% higher than in January 2024.

Number of Programs Offered in FY24-25

Month	Adult Programs	General Programs	YA Programs	Kids Programs
July	46	38	15	36
August	56	32	10	22
September	70	26	17	27
October	77	27	20	38
November	59	27	18	26
December	52	20	14	21
January	60	19	16	27

- Programming saw an increase in the number of programs offered between January (122) and December (106). The number of programs offered in January 2025 was slightly lower than the number of programs offered in January 2024 (125).

FY24-25 Program Attendance
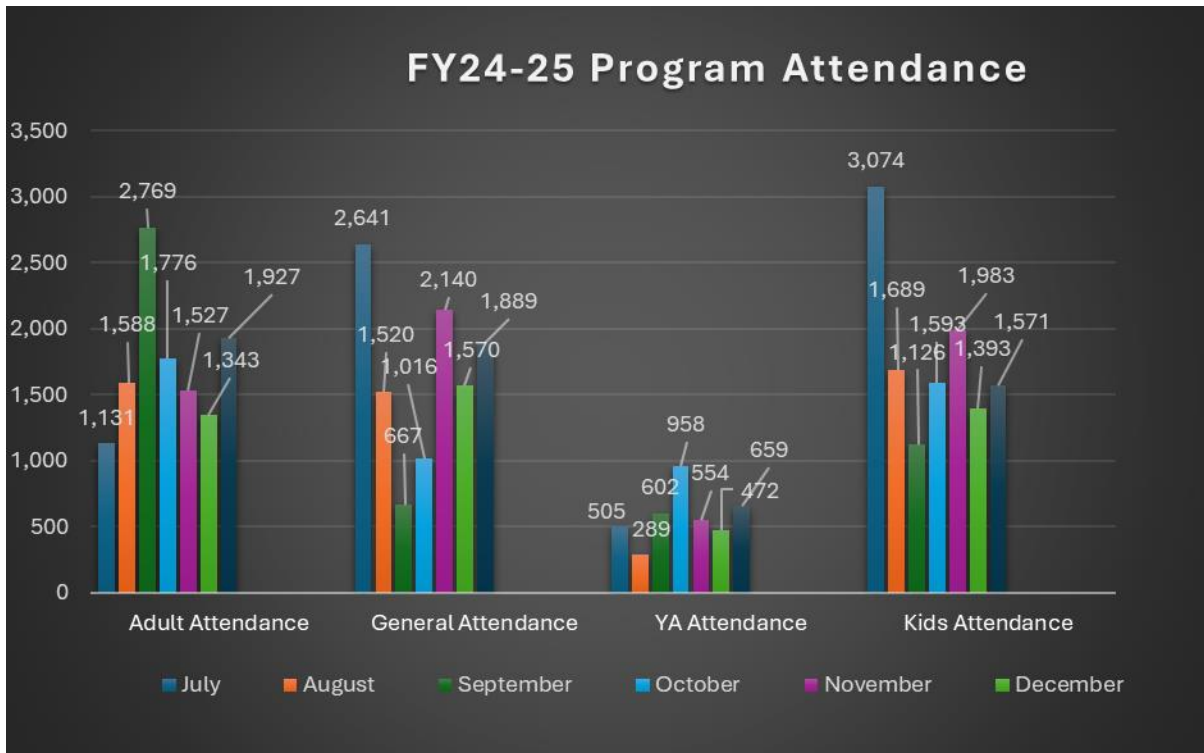
- Program attendees for January 2025 totaled 6,046 individuals. This is approximately 25.8% more than the 4,805 that attended programs in December. Compared with January 2024, which saw 3,357 attendees for programs, there was an approximate increase for the current year of approximately 80.1%. This was likely due to a nicer January this year compared to last year.

Strategic Plan Updates:

- Library management staff continue to work on the 2025 Plan of Service for reaching 2025 goals and objectives.
- Funding opportunities continue to be identified and explored in support of the strategic plan goals.
- Funding has been requested, and will likely be included in the Library's FY 26 operating budget, to continue adding additional signage for increased accessibility.
- Spring all-staff training day will provide an opportunity for all staff to collaborate with peers from other corridor libraries as well as have the opportunity to gain CE hours towards their certification and/ or renewal with the State Library.
- Additional staff training opportunities for future months are being investigated and include training for customer service, readers advisory, and reference services.

- A new partnership and bookmobile route stop was added in January at the Dupaco on the east side of Marion.

General Department Updates:

- **Library Administration**
  - As previously reported, it was discovered in December the heated sidewalk outside the library's north entrance is uneven with the unheated city sidewalk. Additional uneven sidewalks were discovered in January on the west side of the building near the planters. Additional signage is scheduled to be installed along with yellow caution tape on the ground until a permanent solution can be implemented by Public Works.
  - Budget planning for FY 26 continues with the next steps being approval of the budget by City Council later this spring. A budget hearing for all city departments with the City Council was held on January 31. At a high level, these are highlights for the Library FY 26 budget:
    - All library and city staff are ***LIKELY*** (not fully approved yet!!!) to see a 5% wage increase starting July 1. This includes a 3% cost of living adjustment (COLA) and 2% merit increase.
    - The library bookmobile program will see added funding to support operations and the bookmobile collection (this is brand new funding that we have not had in previous budget years).
    - Increase in the budget for Hoopla digital materials (we have been significantly over budget for this very popular resource since before I arrived here as director almost four years ago).
    - Funding for several one-time projects including furniture in the children's interactive play area, security cameras in the meeting rooms, additional signage and shelving fixtures for the collection, funding to modify the drainage on the north side of the library, and some funding to replace equipment that is worn out or broken.
    - Requests made for several additional staff positions (total of seven in all) were not granted.
    - We saw minor reductions in our continuing education budget, travel budget, and marketing budgets.
  - Work continues to alleviate the leaky roof above the marketplace in the library. The City and Library team met with Bush Construction on a resolution to the leaking area. Currently, Bush is working to identify the root cause of the leak and engage with the original contractor responsible for that portion of the construction of the library.

- o The library has been fortunate to have John Hughes from Public Works 'on loan' to help with minor maintenance and repair issues around the library. John has been enthusiastic, easy to work with, and very productive.
- **Marketing and special Events update from Ashley Osborn**
    - o Marketing
        - Ashley participated in a Day of Caring Agency Training, hosted by United Way of East Central Iowa. The library will be a Day of Caring site this May; Sue, Bob, and Ashley are working to gather projects for volunteers to complete.
        - The marketing workback plan for this year's Summer Library Program is being developed.
        - Social media analytics continue to trend upward. Since the start of December, the library has seen increased reach and engagement across Facebook and Instagram.
            - Facebook's engagement increased by 68%
            - Instagram's engagement increased by 15%

        Both of these engagement increases can be attributed to posting a wider variety of content, as well as utilizing Facebook and Instagram stories to engage with followers.
        - Open rates for all email newsletters from the library continue to stay above industry standards. Open rates range from 32 – 38%.
    - o Meetings & Special Events
        - 66 reservations were made for January. 56/66 reservations were completed.
            - Boardroom: 27 reservations
            - Community Room: 4 reservations
            - Community Room A: 9 reservations
            - Community Room B: 16 reservations
            - Outdoor Reading Terrace: 0 reservations
    - o Media Mentions
        - January 15: GCRCF Approves More Than $3 Million in Grants (Corridor Business Journal)
        - January 24: Bookmobile (MSN)
- **Patron Services update from Bob Reynolds**
    - o There were 13 Patron Incidents in December. These were behavior policy breaks.
    - o There were no reported injuries in January.
    - o Rural Linn County circulation continues to increase.
    - o Open access circulation has increased from the previous month.
    - o Volunteer hours have increased as we have several volunteers returning from their holiday time.

o Notary service has significantly risen from previous months.

- **Programming update**
  - Sue and the programming team continue to complete plans for the summer learning program. Hilery is working with Sue to find sponsors for some of the events. Programming team met with Ashley to go over marketing needs.
  - Our work study student, Dane, provided an all-ages origami program during Winter Break that had 21 attendees.
  - Gia's Italian Kitchen cooking class continues to be popular with 42 attendees.
  - We hosted Summit Schools for resource talks and library tours (49 attendees).
  - A partnership program with the Cedar Rapids Museum of Art called "Let's Get Abstract" had 18 attendees utilizing our MakerSpace.
  - Adult Trivia Night was popular with 22 attendees vying for #1 in 80's knowledge.
  - Our friends with the Cedar Valley Woodcarvers continue to amaze the community with their demonstrations (24 attendees).
  - Our volunteer, Mary, helped us create beautiful Valentine's Day cards in the MakerSpace (10 attendees).
  - Our partner program with Orchestra Iowa, Symphony Kids, had children and their families singing and dancing (19 attendees).
  - Murdoch Funeral Homes provided an informational talk about funeral preparations during one of our Encore Cafe programs (70 attendees).
  - We had our most popular monthly Take-and-Make project yet, with over 1800 penguins printed and over 140 returned!
  - Adult Game Night was popular as over 20 attendees shared and played the games they acquired over the holiday season.
  - Teen afterschool programs continue to be massively popular, with Retro Game Day drawing 71 teens!

- **Reader's Advisory & Collections update from Sue Gerth**
  - Collection team started the 7-day check out for seasonal picture books in the children's department. A few are still trickling in, but the majority of the collection is changed.
  - Linda created signage for the adult fiction area that will help with wayfinding. Nonfiction is next!
  - Sue ordered Whazoodles, a new internet-free listening device for children from Playaway.
  - Signage for Playaway area on the first floor was changed to Audiobooks, in hopes of increasing circulation of titles. Marketing will follow.
  - Sue ordered books for new book club kits to refresh collection and add to the kits.

- **IT and Building Maintenance from James Teahen**
  - Laptop Kiosk was inoperable for several weeks due to network issues. City IT worked with the kiosk vendor and is now fixed now (this is the reason for the lower laptop check out numbers and higher public computer usage in stats for the month).
  - Conversations have picked up with various vendors on how to rectify the issues that have been occurring with terrace.
  - Annual sprinkler inspection was completed on January 27th.

Metro Library Network (MLN) Updates:
- MLN Library Directors met on January 15 in Marion.
- The progress for the ILS search committee was discussed as was preliminary discussions regarding a new 28E contract for next fiscal year for all MLN members.
- The next scheduled meeting is set for March 26, 2025.

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund **101 - General Fund**										
REVENUE										
Department **410 - Library**										
Intergovernmental										
4420	**State Contributions**									
4420.01	State Contributions General	.00	.00	.00	.00	.00	.00	.00	+++	.00
4420.06	State Contributions Enrich Iowa - Direct Aid	10,500.00	.00	10,500.00	.00	.00	10,698.14	(198.14)	102	10,665.33
	4420 - State Contributions Totals	$10,500.00	$0.00	$10,500.00	$0.00	$0.00	$10,698.14	($198.14)	102%	$10,665.33
4424	Enrich Iowa - Open Access	62,000.00	.00	62,000.00	.00	.00	90,997.79	(28,997.79)	147	61,456.04
4425	Enrich Iowa - InterLibrary Loan	.00	.00	.00	.00	.00	.00	.00	+++	.00
4440	**Local Grants/Contributions**									
4440.01	Local Grants/Contributions General	.00	.00	.00	.00	.00	.00	.00	+++	.00
	4440 - Local Grants/Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
4441	County Borrowers	55,000.00	.00	55,000.00	.00	.00	2.50	54,997.50	0	.00
4442	Contracting Cities	36,000.00	.00	36,000.00	9,081.26	.00	27,243.77	8,756.23	76	18,287.26
	Intergovernmental Totals	$163,500.00	$0.00	$163,500.00	$9,081.26	$0.00	$128,942.20	$34,557.80	79%	$90,408.63
Charges for Service										
4504	Copy Charges	5,000.00	.00	5,000.00	859.34	.00	6,073.20	(1,073.20)	121	3,736.63
4505	Lost/Damaged and Paid	6,000.00	.00	6,000.00	949.51	.00	4,577.14	1,422.86	76	3,908.45
4506	Fax Revenues	.00	.00	.00	.60	.00	22.85	(22.85)	+++	22.00
4509	Rental - Community Room	4,000.00	.00	4,000.00	1,097.50	.00	8,360.00	(4,360.00)	209	3,312.50
	Charges for Service Totals	$15,000.00	$0.00	$15,000.00	$2,906.95	$0.00	$19,033.19	($4,033.19)	127%	$10,979.58
Misc Revenues										
4702	**Penalties/Fines**									
4702.03	Penalties/Fines Other	100.00	.00	100.00	.00	.00	.00	100.00	0	46.74
	4702 - Penalties/Fines Totals	$100.00	$0.00	$100.00	$0.00	$0.00	$0.00	$100.00	0%	$46.74
4704	Misc Revenues	6,600.00	.00	6,600.00	1,216.01	.00	4,315.74	2,284.26	65	3,321.31
4708	**Other Contributions**									
4708.01	Other Contributions General	35,503.00	.00	35,503.00	.00	.00	35,503.00	.00	100	35,503.00
	4708 - Other Contributions Totals	$35,503.00	$0.00	$35,503.00	$0.00	$0.00	$35,503.00	$0.00	100%	$35,503.00
4709	Fuel Tax Refunds	.00	.00	.00	.00	.00	4.47	(4.47)	+++	1.98
	Misc Revenues Totals	$42,203.00	$0.00	$42,203.00	$1,216.01	$0.00	$39,823.21	$2,379.79	94%	$38,873.03
	Department **410 - Library** Totals	$220,703.00	$0.00	$220,703.00	$13,204.22	$0.00	$187,798.60	$32,904.40	85%	$140,261.24
	REVENUE TOTALS	$220,703.00	$0.00	$220,703.00	$13,204.22	$0.00	$187,798.60	$32,904.40	85%	$140,261.24
EXPENSE										
Department **410 - Library**										
Salaries										
6010	Regular Full-Time Salaries	955,546.00	.00	955,546.00	92,396.96	.00	554,141.09	401,404.91	58	492,055.06
6020	Regular Part-Time Salaries	571,282.00	.00	571,282.00	49,470.62	.00	271,328.45	299,953.55	47	248,867.55
6030	Hourly Wages - Temporary/Seasonal	.00	.00	.00	.00	.00	.00	.00	+++	.00
6040	Overtime Pay	.00	.00	.00	.00	.00	.00	.00	+++	20.83

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Fund 101 - General Fund										
EXPENSE										
Department **410 - Library**										
Salaries										
6050	Benefits Payout	.00	.00	.00	.00	.00	7,749.40	(7,749.40)	+++	16,511.40
	Salaries Totals	$1,526,828.00	$0.00	$1,526,828.00	$141,867.58	$0.00	$833,218.94	$693,609.06	55%	$757,454.84
Employee Benefits/Costs										
6110	Social Security	73,548.00	.00	73,548.00	8,727.43	.00	51,337.46	22,210.54	70	46,724.56
6120	Medicare	22,383.00	.00	22,383.00	2,041.09	.00	12,006.38	10,376.62	54	10,927.49
6130	IPERS	126,856.00	.00	126,856.00	13,377.45	.00	77,775.71	49,080.29	61	69,548.41
6150	Health Insurance	163,431.00	.00	163,431.00	11,815.49	.00	80,232.17	83,198.83	49	84,367.05
6151	Wellness Program	308.00	.00	308.00	22.20	.00	172.05	135.95	56	175.75
6152	Life Insurance	1,545.00	.00	1,545.00	103.86	.00	823.60	721.40	53	858.99
6153	Long Term Disability	3,735.00	.00	3,735.00	266.18	.00	2,084.84	1,650.16	56	2,017.36
6154	Dental Insurance	3,604.00	.00	3,604.00	315.16	.00	2,015.80	1,588.20	56	1,978.48
6160	Worker's Compensation	873.00	.00	873.00	92.32	.00	836.00	37.00	96	1,015.03
6170	Unemployment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6180	Allowances	7,920.00	.00	7,920.00	330.00	.00	2,310.00	5,610.00	29	3,630.00
6190	Education Stipend	9,000.00	.00	9,000.00	750.00	.00	5,850.00	3,150.00	65	5,250.00
	Employee Benefits/Costs Totals	$413,203.00	$0.00	$413,203.00	$37,841.18	$0.00	$235,444.01	$177,758.99	57%	$226,493.12
Staff Development										
6199	Tuition Reimbursement	.00	.00	.00	.00	.00	.00	.00	+++	.00
6210	Dues/Membership	3,825.00	.00	3,825.00	960.00	.00	1,155.00	2,670.00	30	.00
6220	Subscriptions/Education Materials	750.00	.00	750.00	.00	.00	.00	750.00	0	339.50
6230	Training/Conference Registrations	8,125.00	.00	8,125.00	75.00	.00	2,913.41	5,211.59	36	3,708.75
6240	Travel Expenses	5,000.00	.00	5,000.00	.00	.00	4,976.93	23.07	100	4,502.43
6260	Employee Health Screenings	420.00	.00	420.00	.00	.00	.00	420.00	0	.00
	Staff Development Totals	$18,120.00	$0.00	$18,120.00	$1,035.00	$0.00	$9,045.34	$9,074.66	50%	$8,550.68
Repair/Maintenance/Utilities										
6310	Building Maintenance & Repairs	61,700.00	.00	61,700.00	12,352.76	.00	23,299.74	38,400.26	38	8,232.91
6320	Grounds Maintenance & Repairs	1,250.00	.00	1,250.00	327.95	.00	689.75	560.25	55	.00
6331	Vehicle Maintenance	3,200.00	.00	3,200.00	11.99	.00	20.48	3,179.52	1	9.00
6332	Vehicle Repairs - Internal	.00	.00	.00	.00	.00	.00	.00	+++	.00
6333	Vehicle Repairs - External	.00	.00	.00	.00	.00	.00	.00	+++	.00
6334	Tires	.00	.00	.00	.00	.00	.00	.00	+++	.00
6350	Other Equipment Repairs	2,150.00	.00	2,150.00	940.00	.00	1,070.00	1,080.00	50	940.00
6371	Electric/Gas Utility Expense	109,425.00	.00	109,425.00	4,916.86	.00	49,816.43	59,608.57	46	50,784.69
6373	Communications Utility Expenses	5,520.00	.00	5,520.00	453.31	.00	3,877.88	1,642.12	70	3,073.44
6374	Water/Sewer Utility Expenses	1,980.00	.00	1,980.00	232.68	.00	783.49	1,196.51	40	839.81
	Repair/Maintenance/Utilities Totals	$185,225.00	$0.00	$185,225.00	$19,235.55	$0.00	$79,557.77	$105,667.23	43%	$63,879.85

Run by Kimberly Cowger on 02/11/2025 10:24:02 AM

City of Marion IOWA

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund 101 - General Fund										
EXPENSE										
Department **410 - Library**										
Contractual Services										
6402	Advertising/Publications	8,798.00	.00	8,798.00	31.56	.00	2,337.33	6,460.67	27	1,620.11
6403	Outsourced Labor Services	.00	.00	.00	.00	.00	.00	.00	+++	.00
6408	General Insurance	80,683.00	.00	80,683.00	.00	.00	84,247.11	(3,564.11)	104	59,764.79
6409	Credit Card Merchant Fees	1,320.00	.00	1,320.00	253.31	.00	1,214.41	105.59	92	768.76
6411	Contracts - Legal Services	.00	.00	.00	.00	.00	.00	.00	+++	.00
6413	Contracts - 28E	144,900.00	.00	144,900.00	.00	.00	143,430.32	1,469.68	99	143,430.32
6416	Contracts - Real Estate Rental	.00	.00	.00	.00	.00	.00	.00	+++	.00
6419	Contracts - Technology Service	101,127.00	.00	101,127.00	6,618.52	5,175.30	58,472.83	37,478.87	63	45,905.21
6423	Contracts - Janitorial Services	54,480.00	.00	54,480.00	4,480.00	.00	31,360.00	23,120.00	58	34,220.00
6424	Contracts - Office Equipment	14,400.00	.00	14,400.00	706.09	7,660.96	4,345.98	2,393.06	83	1,116.05
6425	Contracts - Building Maintenance	35,530.00	.00	35,530.00	411.75	596.82	6,055.71	28,877.47	19	3,881.50
6426	Contracts - Grounds Maintenance	.00	.00	.00	.00	.00	.00	.00	+++	.00
6499	Contracts - Other Services	9,600.00	.00	9,600.00	578.50	.00	4,218.93	5,381.07	44	3,584.40
	Contractual Services Totals	$450,838.00	$0.00	$450,838.00	$13,079.73	$13,433.08	$335,682.62	$101,722.30	77%	$294,291.14
Commodities										
6502	Promotional Items	6,000.00	.00	6,000.00	757.54	.00	4,404.71	1,595.29	73	1,117.02
6506	Office Supplies	8,250.00	.00	8,250.00	386.46	.00	1,037.73	7,212.27	13	1,544.32
6507	Operational Supplies	45,365.00	.00	45,365.00	1,785.00	.00	11,074.85	34,290.15	24	14,348.07
6508	Postage/Shipping	10,200.00	.00	10,200.00	692.37	.00	3,194.16	7,005.84	31	1,485.65
6510	Forms/Printing Services	8,950.00	.00	8,950.00	.00	.00	3,684.49	5,265.51	41	47.54
6511	Janitorial Supplies	10,600.00	.00	10,600.00	357.64	.00	4,114.03	6,485.97	39	3,470.68
6513	Vehicle Operating Supplies	5,000.00	.00	5,000.00	25.05	.00	161.93	4,838.07	3	28.92
6514	Medical Supplies	2,295.00	.00	2,295.00	23.32	.00	674.32	1,620.68	29	252.57
6560	Pre-Employment Screening	434.00	.00	434.00	.00	.00	.00	434.00	0	.00
6580	Technology	2,850.00	.00	2,850.00	.00	.00	115.27	2,734.73	4	3,468.04
6590	Events & Meetings	1,000.00	.00	1,000.00	44.97	.00	89.67	910.33	9	291.78
6599	Misc Commodities/Expenses	5,200.00	.00	5,200.00	139.99	.00	774.93	4,425.07	15	.00
	Commodities Totals	$106,144.00	$0.00	$106,144.00	$4,212.34	$0.00	$29,326.09	$76,817.91	28%	$26,054.59
Capital Outlay										
6711	Furniture	.00	.00	.00	.00	.00	.00	.00	+++	.00
6712	Equipment	8,000.00	.00	8,000.00	.00	.00	.00	8,000.00	0	.00
6713	Office Equipment	.00	.00	.00	.00	.00	.00	.00	+++	109.00
6714	Technology Hardware/Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6715	Software	.00	.00	.00	.00	.00	.00	.00	+++	1,867.97
6717	Small Project Costs	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718	**Library Materials**									
6718.01	Library Materials Adult Materials	75,560.00	.00	75,560.00	4,528.98	.00	42,428.35	33,131.65	56	45,719.00

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund 101 - General Fund										
EXPENSE										
Department **410 - Library**										
Capital Outlay										
6718	**Library Materials**									
6718.02	Library Materials Young Adult Materials	8,000.00	.00	8,000.00	825.70	.00	4,567.87	3,432.13	57	17,636.09
6718.03	Library Materials Children's Materials	54,500.00	.00	54,500.00	3,003.41	.00	21,263.06	33,236.94	39	34,784.74
6718.04	Library Materials Audio Materials	32,500.00	.00	32,500.00	.00	.00	11,939.68	20,560.32	37	10,985.71
6718.05	Library Materials Video Materials	16,000.00	.00	16,000.00	1,248.42	.00	9,095.92	6,904.08	57	11,244.06
6718.06	Library Materials Downloadable Books	10,000.00	.00	10,000.00	1,242.78	.00	8,420.81	1,579.19	84	6,608.63
6718.07	Library Materials Downloadable Media	50,000.00	.00	50,000.00	6,424.54	.00	50,441.68	(441.68)	101	40,061.25
6718.08	Library Materials Other	44,217.00	.00	44,217.00	448.47	8,250.00	28,520.57	7,446.43	83	31,909.65
6718.09	Library Materials Electronic Materials	.00	.00	.00	.00	.00	.00	.00	+++	.00
	6718 - Library Materials Totals	$290,777.00	$0.00	$290,777.00	$17,722.30	$8,250.00	$176,677.94	$105,849.06	64%	$198,949.13
	Capital Outlay Totals	$298,777.00	$0.00	$298,777.00	$17,722.30	$8,250.00	$176,677.94	$113,849.06	62%	$200,926.10
Transfers										
6910	**Transfers Out**									
6910.02	Transfers Out To Equipment Reserve Fund	.00	.00	.00	.00	.00	.00	.00	+++	.00
6910.08	Transfers Out To Employee Benefits	.00	.00	.00	.00	.00	.00	.00	+++	.00
	6910 - Transfers Out Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
	Transfers Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
	Department **410 - Library** Totals	$2,999,135.00	$0.00	$2,999,135.00	$234,993.68	$21,683.08	$1,698,952.71	$1,278,499.21	57%	$1,577,650.32
	EXPENSE TOTALS	$2,999,135.00	$0.00	$2,999,135.00	$234,993.68	$21,683.08	$1,698,952.71	$1,278,499.21	57%	$1,577,650.32
	Fund **101 - General Fund** Totals									
	REVENUE TOTALS	220,703.00	.00	220,703.00	13,204.22	.00	187,798.60	32,904.40	85%	140,261.24
	EXPENSE TOTALS	2,999,135.00	.00	2,999,135.00	234,993.68	21,683.08	1,698,952.71	1,278,499.21	57%	1,577,650.32
	Fund **101 - General Fund** Totals	($2,778,432.00)	$0.00	($2,778,432.00)	($221,789.46)	($21,683.08)	($1,511,154.11)	($1,245,594.81)		($1,437,389.08)
Fund 105 - Equipment Reserve Fund										
EXPENSE										
Department **410 - Library**										
Commodities										
6580	Technology	10,660.00	.00	10,660.00	.00	4,990.00	.00	5,670.00	47	10,549.49
	Commodities Totals	$10,660.00	$0.00	$10,660.00	$0.00	$4,990.00	$0.00	$5,670.00	47%	$10,549.49
Capital Outlay										
6711	Furniture	.00	.00	.00	.00	.00	.00	.00	+++	.00
6712	Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6713	Office Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6714	Technology Hardware/Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6715	Software	.00	.00	.00	.00	.00	.00	.00	+++	.00
6717	Small Project Costs	.00	.00	.00	.00	.00	.00	.00	+++	.00

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund 105 - Equipment Reserve Fund										
EXPENSE										
Department **410 - Library**										
	Capital Outlay Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
	Department **410 - Library** Totals	$10,660.00	$0.00	$10,660.00	$0.00	$4,990.00	$0.00	$5,670.00	47%	$10,549.49
	EXPENSE TOTALS	$10,660.00	$0.00	$10,660.00	$0.00	$4,990.00	$0.00	$5,670.00	47%	$10,549.49
	Fund **105 - Equipment Reserve Fund** Totals									
	REVENUE TOTALS	.00	.00	.00	.00	.00	.00	.00	+++	.00
	EXPENSE TOTALS	10,660.00	.00	10,660.00	.00	4,990.00	.00	5,670.00	47%	10,549.49
	Fund **105 - Equipment Reserve Fund** Totals	($10,660.00)	$0.00	($10,660.00)	$0.00	($4,990.00)	$0.00	($5,670.00)		($10,549.49)
Fund 130 - Special Revenue										
REVENUE										
Department **410 - Library**										
Intergovernmental										
4400	**Federal Grants/Contributions**									
4400.01	Federal Grants/Contributions General	.00	.00	.00	.00	.00	.00	.00	+++	.00
	4400 - Federal Grants/Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
4420	**State Contributions**									
4420.01	State Contributions General	.00	.00	.00	.00	.00	.00	.00	+++	.00
4420.06	State Contributions Enrich Iowa - Direct Aid	.00	.00	.00	.00	.00	.00	.00	+++	.00
	4420 - State Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
	Intergovernmental Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
Misc Revenues										
4701	**Donations**									
4701.01	Donations General	20,000.00	.00	20,000.00	15,806.00	.00	30,446.88	(10,446.88)	152	34,001.66
	4701 - Donations Totals	$20,000.00	$0.00	$20,000.00	$15,806.00	$0.00	$30,446.88	($10,446.88)	152%	$34,001.66
4708	**Other Contributions**									
4708.01	Other Contributions General	10,000.00	.00	10,000.00	.00	.00	.00	10,000.00	0	25,000.00
	4708 - Other Contributions Totals	$10,000.00	$0.00	$10,000.00	$0.00	$0.00	$0.00	$10,000.00	0%	$25,000.00
	Misc Revenues Totals	$30,000.00	$0.00	$30,000.00	$15,806.00	$0.00	$30,446.88	($446.88)	101%	$59,001.66
	Department **410 - Library** Totals	$30,000.00	$0.00	$30,000.00	$15,806.00	$0.00	$30,446.88	($446.88)	101%	$59,001.66
	REVENUE TOTALS	$30,000.00	$0.00	$30,000.00	$15,806.00	$0.00	$30,446.88	($446.88)	101%	$59,001.66
EXPENSE										
Department **410 - Library**										
Staff Development										
6240	Travel Expenses	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Staff Development Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
Repair/Maintenance/Utilities										
6310	Building Maintenance & Repairs	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Repair/Maintenance/Utilities Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund 130 - Special Revenue										
EXPENSE										
Department **410 - Library**										
Contractual Services										
6402	Advertising/Publications	.00	.00	.00	.00	.00	.00	.00	+++	.00
6499	Contracts - Other Services	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Contractual Services Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
Commodities										
6590	Events & Meetings	2,500.00	.00	2,500.00	.00	.00	.00	2,500.00	0	2,653.37
6599	Misc Commodities/Expenses	30,000.00	.00	30,000.00	2,088.46	.00	37,142.73	(7,142.73)	124	19,810.42
	Commodities Totals	$32,500.00	$0.00	$32,500.00	$2,088.46	$0.00	$37,142.73	($4,642.73)	114%	$22,463.79
Capital Outlay										
6711	Furniture	.00	.00	.00	.00	.00	.00	.00	+++	.00
6714	Technology Hardware/Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6715	Software	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Capital Outlay Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
Transfers										
6910	**Transfers Out**									
6910.01	Transfers Out To General Fund	.00	.00	.00	.00	.00	.00	.00	+++	.00
	6910 - Transfers Out Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
	Transfers Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
	Department **410 - Library** Totals	$32,500.00	$0.00	$32,500.00	$2,088.46	$0.00	$37,142.73	($4,642.73)	114%	$22,463.79
	EXPENSE TOTALS	$32,500.00	$0.00	$32,500.00	$2,088.46	$0.00	$37,142.73	($4,642.73)	114%	$22,463.79
	Fund **130 - Special Revenue** Totals									
	REVENUE TOTALS	30,000.00	.00	30,000.00	15,806.00	.00	30,446.88	(446.88)	101%	59,001.66
	EXPENSE TOTALS	32,500.00	.00	32,500.00	2,088.46	.00	37,142.73	(4,642.73)	114%	22,463.79
	Fund **130 - Special Revenue** Totals	($2,500.00)	$0.00	($2,500.00)	$13,717.54	$0.00	($6,695.85)	$4,195.85		$36,537.87
Fund 301 - Capital Projects										
REVENUE										
Department **410 - Library**										
Intergovernmental										
4400	**Federal Grants/Contributions**									
4400.01	Federal Grants/Contributions General	100,000.00	.00	100,000.00	.00	.00	2,287.00	97,713.00	2	.00
	4400 - Federal Grants/Contributions Totals	$100,000.00	$0.00	$100,000.00	$0.00	$0.00	$2,287.00	$97,713.00	2%	$0.00
4420	**State Contributions**									
4420.01	State Contributions General	.00	.00	.00	.00	.00	(16,499.29)	16,499.29	+++	.00
	4420 - State Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	($16,499.29)	$16,499.29	+++	$0.00
4440	**Local Grants/Contributions**									
4440.01	Local Grants/Contributions General	.00	.00	.00	.00	.00	.00	.00	+++	.00
	4440 - Local Grants/Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund **301 - Capital Projects**										
REVENUE										
Department **410 - Library**										
	Intergovernmental Totals	$100,000.00	$0.00	$100,000.00	$0.00	$0.00	($14,212.29)	$114,212.29	-14%	$0.00
Misc Revenues										
4701	**Donations**									
4701.01	Donations General	.00	.00	.00	.00	.00	.00	.00	+++	349,177.00
	4701 - Donations Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$349,177.00
4708	**Other Contributions**									
4708.01	Other Contributions General	.00	.00	.00	.00	.00	45,234.38	(45,234.38)	+++	.00
	4708 - Other Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$45,234.38	($45,234.38)	+++	$0.00
	Misc Revenues Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$45,234.38	($45,234.38)	+++	$349,177.00
	Department **410 - Library** Totals	$100,000.00	$0.00	$100,000.00	$0.00	$0.00	$31,022.09	$68,977.91	31%	$349,177.00
Department **620 - Finance**										
Intergovernmental										
4400	**Federal Grants/Contributions**									
4400.02	Federal Grants/Contributions FEMA	.00	.00	.00	.00	.00	371,547.65	(371,547.65)	+++	12,160,129.77
	4400 - Federal Grants/Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$371,547.65	($371,547.65)	+++	$12,160,129.77
4420	**State Contributions**									
4420.01	State Contributions General	.00	.00	.00	.00	.00	.00	.00	+++	.00
4420.04	State Contributions FEMA	.00	.00	.00	.00	.00	108,348.33	(108,348.33)	+++	397,799.30
	4420 - State Contributions Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$108,348.33	($108,348.33)	+++	$397,799.30
	Intergovernmental Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$479,895.98	($479,895.98)	+++	$12,557,929.07
Misc Revenues										
4704	Misc Revenues	.00	.00	.00	.00	.00	.00	.00	+++	.00
4710	Insurance Proceeds	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Misc Revenues Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
	Department **620 - Finance** Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$479,895.98	($479,895.98)	+++	$12,557,929.07
	REVENUE TOTALS	$100,000.00	$0.00	$100,000.00	$0.00	$0.00	$510,918.07	($410,918.07)	511%	$12,907,106.07
EXPENSE										
Department **410 - Library**										
Capital Outlay										
6711	Furniture	.00	.00	.00	.00	.00	.00	.00	+++	.00
6712	Equipment	200,000.00	.00	200,000.00	.00	.00	.00	200,000.00	0	.00
6713	Office Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6714	Technology Hardware/Equipment	.00	.00	.00	.00	.00	.00	.00	+++	2,580.00
6715	Software	.00	.00	.00	.00	.00	.00	.00	+++	.00
6717	Small Project Costs	.00	.00	.00	.00	.00	.00	.00	+++	.00
6750	Project Costs	231,000.00	.00	231,000.00	9,453.72	167,373.80	169,196.68	(105,570.48)	146	526,525.08
6752	Land/Right-of-Way Purchases	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Capital Outlay Totals	$431,000.00	$0.00	$431,000.00	$9,453.72	$167,373.80	$169,196.68	$94,429.52	78%	$529,105.08

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund **301 - Capital Projects**										
EXPENSE										
Department **410 - Library** Totals		$431,000.00	$0.00	$431,000.00	$9,453.72	$167,373.80	$169,196.68	$94,429.52	78%	$529,105.08
Department **620 - Finance**										
Staff Development										
6230	Training/Conference Registrations	.00	.00	.00	.00	.00	.00	.00	+++	.00
6240	Travel Expenses	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Staff Development Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
Repair/Maintenance/Utilities										
6310	Building Maintenance & Repairs	.00	.00	.00	.00	.00	(109.56)	109.56	+++	40,157.81
6320	Grounds Maintenance & Repairs	.00	.00	.00	.00	.00	.00	.00	+++	.00
6332	Vehicle Repairs - Internal	.00	.00	.00	.00	.00	.00	.00	+++	.00
6333	Vehicle Repairs - External	.00	.00	.00	.00	.00	.00	.00	+++	.00
6334	Tires	.00	.00	.00	.00	.00	.00	.00	+++	.00
6350	Other Equipment Repairs	.00	.00	.00	.00	.00	.00	.00	+++	.00
6371	Electric/Gas Utility Expense	.00	.00	.00	.00	.00	.00	.00	+++	.00
6373	Communications Utility Expenses	.00	.00	.00	.00	.00	.00	.00	+++	.00
6374	Water/Sewer Utility Expenses	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Repair/Maintenance/Utilities Totals	$0.00	$0.00	$0.00	$0.00	$0.00	($109.56)	$109.56	+++	$40,157.81
Contractual Services										
6403	Outsourced Labor Services	.00	.00	.00	.00	.00	.00	.00	+++	.00
6411	Contracts - Legal Services	.00	.00	.00	.00	.00	.00	.00	+++	.00
6415	Contracts - Equipment Rental	.00	.00	.00	.00	.00	.00	.00	+++	.00
6416	Contracts - Real Estate Rental	.00	.00	.00	.00	.00	.00	.00	+++	.00
6419	Contracts - Technology Service	.00	.00	.00	.00	.00	.00	.00	+++	.00
6423	Contracts - Janitorial Services	.00	.00	.00	.00	.00	.00	.00	+++	.00
6425	Contracts - Building Maintenance	.00	.00	.00	.00	.00	.00	.00	+++	30,079.00
6426	Contracts - Grounds Maintenance	.00	.00	.00	.00	.00	.00	.00	+++	.00
6427	Grant/Rebate Program	.00	.00	.00	.00	.00	.00	.00	+++	.00
6499	Contracts - Other Services	.00	.00	.00	185.00	43,778.75	34,491.40	(78,270.15)	+++	10,115.20
	Contractual Services Totals	$0.00	$0.00	$0.00	$185.00	$43,778.75	$34,491.40	($78,270.15)	+++	$40,194.20
Commodities										
6504	Small Equipment/Tools	.00	.00	.00	.00	.00	.00	.00	+++	.00
6506	Office Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00
6507	Operational Supplies	.00	.00	.00	.00	.00	.00	.00	+++	(179.92)
6508	Postage/Shipping	.00	.00	.00	.00	.00	.00	.00	+++	.00
6509	Traffic Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00
6510	Forms/Printing Services	.00	.00	.00	.00	.00	.00	.00	+++	.00
6511	Janitorial Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00
6513	Vehicle Operating Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00
6514	Medical Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00

Account	Account Description	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year YTD
Fund **301 - Capital Projects**										
EXPENSE										
Department **620 - Finance**										
Commodities										
6524	Street Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00
6526	Forestry Maintenance Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00
6527	Park Maintenance Supplies	.00	.00	.00	.00	.00	.00	.00	+++	.00
6590	Events & Meetings	.00	.00	.00	.00	.00	.00	.00	+++	.00
6599	Misc Commodities/Expenses	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Commodities Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	($179.92)
Capital Outlay										
6710	Vehicles	.00	.00	.00	.00	.00	.00	.00	+++	.00
6711	Furniture	.00	.00	.00	.00	.00	.00	.00	+++	.00
6712	Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6713	Office Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6714	Technology Hardware/Equipment	.00	.00	.00	.00	.00	.00	.00	+++	.00
6715	Software	.00	.00	.00	.00	.00	.00	.00	+++	.00
6716	Trees	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718	**Library Materials**									
6718.01	Library Materials Adult Materials	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718.02	Library Materials Young Adult Materials	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718.03	Library Materials Children's Materials	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718.04	Library Materials Audio Materials	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718.05	Library Materials Video Materials	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718.06	Library Materials Downloadable Books	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718.07	Library Materials Downloadable Media	.00	.00	.00	.00	.00	.00	.00	+++	.00
6718.09	Library Materials Electronic Materials	.00	.00	.00	.00	.00	.00	.00	+++	.00
	6718 - Library Materials Totals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	+++	$0.00
6750	Project Costs	1,200,000.00	.00	1,200,000.00	.00	.00	.00	1,200,000.00	0	.00
6751	Bond Costs	.00	.00	.00	.00	.00	.00	.00	+++	.00
	Capital Outlay Totals	$1,200,000.00	$0.00	$1,200,000.00	$0.00	$0.00	$0.00	$1,200,000.00	0%	$0.00
Department **620 - Finance** Totals		$1,200,000.00	$0.00	$1,200,000.00	$185.00	$43,778.75	$34,381.84	$1,121,839.41	7%	$80,172.09
	EXPENSE TOTALS	$1,631,000.00	$0.00	$1,631,000.00	$9,638.72	$211,152.55	$203,578.52	$1,216,268.93	25%	$609,277.17
Fund **301 - Capital Projects** Totals										
	REVENUE TOTALS	100,000.00	.00	100,000.00	.00	.00	510,918.07	(410,918.07)	511%	12,907,106.07
	EXPENSE TOTALS	1,631,000.00	.00	1,631,000.00	9,638.72	211,152.55	203,578.52	1,216,268.93	25%	609,277.17
Fund **301 - Capital Projects** Totals		($1,531,000.00)	$0.00	($1,531,000.00)	($9,638.72)	($211,152.55)	$307,339.55	($1,627,187.00)		$12,297,828.90
Grand Totals										
	REVENUE TOTALS	350,703.00	.00	350,703.00	29,010.22	.00	729,163.55	(378,460.55)	208%	13,106,368.97

EXPENSE TOTALS	4,673,295.00	.00	4,673,295.00	246,720.86	237,825.63	1,939,673.96	2,495,795.41	47%	2,219,940.77
Grand Totals	($4,322,592.00)	$0.00	($4,322,592.00)	($217,710.64)	($237,825.63)	($1,210,510.41)	($2,874,255.96)		$10,886,428.20

Department **35 Library**

Purchase Order	2025-00000195	Department	35 Library	G/L Date	01/23/2025	Amount	8,250.00
Description	Collection HQ - Collection Management Tool	Vendor	2156 - Baker & Taylor LLC	Deliver by Date		Voided	.00
Type	Unbudgeted		Lee Ann Queen	Printed Date	01/28/2025	Discounted	.00
Status	Open		PO Box 277930	Completed Date		Expensed	.00
Bill To Location	LIBRARY - Library		Atlanta, GA 30384	Expiration Date		Remaining	8,250.00
Assigned To Buyer						Encumbered	8,250.00
Resolution Number	32239						

Item 1							
	Description	Library Materials - Collection HQ One Time Implementation and Training Fee	Vendor Part Number			Amount	1,500.00
	Quantity	1.0000	Contract Number			Voided	.00
	U/M	Each	Ship To Location	LIBRARY - Library		Discounted	.00
	Price per Unit	1,500.00	1099 Item	No		Expensed	.00
	Discount	0%	Tavable	No		Remaining	1,500.00
	Status	Open	Confirming	No		Encumbered	1,500.00

	G/L Account	Project		Amount	Expensed	Encumbered
	101.410.6718.08 (Library Materials Other)				.00	1,500.00

Item 2							
	Description	Library Materials - Collection HQ Subscription Fee for One Year	Vendor Part Number			Amount	6,750.00
	Quantity	1.0000	Contract Number			Voided	.00
	U/M	Each	Ship To Location	LIBRARY - Library		Discounted	.00
	Price per Unit	6,750.00	1099 Item	No		Expensed	.00
	Discount	0%	Tavable	No		Remaining	6,750.00
	Status	Open	Confirming	No		Encumbered	6,750.00

	G/L Account	Project		Amount	Expensed	Encumbered
	101.410.6718.08 (Library Materials Other)				.00	6,750.00

Department **35 Library** Totals	Purchase Orders	1	Amount	$8,250.00
			Voided	$0.00
			Discounted	$0.00
			Expensed	$0.00
			Remaining	$8,250.00
			Encumbered	$8,250.00
Grand Totals	Purchase Orders	1	Amount	$8,250.00
			Voided	$0.00
			Discounted	$0.00
			Expensed	$0.00
			Remaining	$8,250.00
			Encumbered	$8,250.00

Children's Interactive Learning Area
Behavioral Guidelines Policy

MARION Public Library

Scope of Policy				
Scope:	Expected Behavior in the Interactive Learning Area	*Effective Date:*	~~Appproved~~Revised 02/17/2025~~4/10/23~~	

General Policy/Purpose

The Interactive Learning Area in the Youth Collection is a highly utilized area for many children and caregivers. The library and its staff ~~strives~~strive to provide everyone in this area with a positive experience. The provisions in this policy have been created for the enjoyment and safety of all patrons.

Provisions

I.   Interactive Learning Area Behavior Guidelines

The following rules supplement library guidelines for general patron behavior. Please see the library's Behavior Guidelines Policy and the Unattended Child Policy for a complete list of behavior provisions.

1. Patrons under the age of 9 must be supervised by a caregiver over the age of 12.

2. All patrons are required to wear shoes in the Interactive Learning Area.

3. Use inside voices and always walk in the Interactive Learning Area. Children should not engage in rough play, pushing, or shoving while in the play area to prevent injury to themselves or others. Patrons should exhibit the same physical behavior as they do in other parts of the library.

4. Throwing or bringing items onto the slide is not permitted. Climbing on the outside of the slide is not permitted.

5. Toys, furniture, and other library items located in the Interactive Learning Area should stay in the area.

6. Library materials should be returned to library carts if they aren't being checked out.

7. Beverages with a sealable lid are allowed in the Interactive Learning Area. Food is not permitted; all food must be consumed upstairs in the Creative Commons.

8. Caregivers are responsible for ensuring younger patrons are cleaning up after themselves.

II.   Inappropriate Behavior Procedures

Patrons who are behaving inappropriately in the library will be approached by library staff and asked to behave in an appropriate manner. Continued inappropriate behavior may result in loss of library privileges. Loss of privileges may be extended to other metro libraries, as all three libraries have agreed to support one another in these decisions. In cases where library privileges are withdrawn, a patron must meet with the Library Director or with a manager for reinstatement of privileges.

Meeting Room Policy

MARION Public Library

Scope of Policy

Scope:	General Rules for Use of the Library Meeting Rooms	*Effective Date:*	Revised ~~05~~02/~~13~~17/~~2024~~2025

General Policy/Purpose

Marion Public Library meeting rooms are designed to accommodate a wide range of programs and uses relating to the library and matters of public or private interest. The ~~Library~~ library and its Board of Trustees do not endorse any particular program or its content.

Provisions

I. Meeting Room Hours

1. Library meeting rooms are available during hours the library is open unless special permission is granted by the Library Director or Marketing & Special Events Manager.

II. General Rules Governing Use of the Meeting Rooms

1. Meeting room capacities must be observed. Occupancy limits are posted in each meeting room and on the library's website.

2. The library is not responsible for loss or damage to the ~~private~~ personal property of individuals or organizations using meeting room facilities.

3. Damage incurred to library property will be the responsibility of the group reserving the meeting rooms and costs will be billed accordingly. Any unpaid damages or cleaning fees may result in a group or individual being barred from future room use.

4. Meeting rooms may not be reserved by an organization for their own membership purposes for more than one date during a month. Exceptions may be made at the discretion of library management.

5. All rooms are kept locked. Room users must check in at the Information Desk upon arrival and notify staff when finished.

6. Meeting room users must keep all participants, activities, and displays for their reservation inside of the meeting rooms. Loitering outside of rooms is not permitted.

7. All meeting room doors must be kept closed for the duration of the reservation.

8. No group or organization may reassign use of the facility to another.

9. The library is a tobacco-free facility, including vaping and electronic cigarettes.

10. No alcohol can be served or consumed on the property (except for special events with prior approval from the Library Director).

11. Any open flame is prohibited, including candles and warming tray burners.

12. All meeting room users must adhere to all ~~Library~~ library policies, rules, and procedures.

III. Room Arrangement, Setup & Cleanup Guidelines

1. Meeting room users are responsible for all room arrangement, setup, and cleanup. This includes arranging tables, chairs, and other library furniture according to their needs, as well as ensuring the room is returned to an acceptable condition for the next user. It is understood that meeting rooms may be in use multiple times a day for multiple different groups.

2. All tables, chairs, and other library furniture must be returned to the standard layout by the end of the reservation. A diagram of the room's standard setup can be found on the wall of each area.

3. All personal property of meeting room users must be removed by the end of their reservation, and trash must be placed in receptacles provided. The library is not able to store materials or other ~~belongings~~ personal property for meeting room users or participants.

4. Cleaning supplies will be made available for meeting room users to ensure the room is returned to an acceptable condition for the next reservation.

5. Routine custodial services will be provided by the library if the room is left in an acceptable condition. If more than routine cleaning is necessary, the user group will be billed accordingly.

6. Decorations and other materials may not be fastened to library floors, walls, doors, windows, white boards, or furniture, and partition walls. Confetti and glitter are not permitted.

IV. Promotion & Advertisement of Meeting Rooms

1. Public notices and advertising of meetings to be held in the library should refer to the specific or designated meeting space.

2. Groups cannot list a library telephone number on any public announcement. The library may not be used as an organization's mailing address and will not accept messages for groups using the meeting rooms.

3. The group's advertising and promotional efforts must not imply that the library is a sponsor or a co-sponsor of its meeting. The library's logo is not permitted to be used in these efforts.

4. Advertisements, signage, and other decorations for meetings to be held in the library cannot be fastened to the façade of the library or displayed on library grounds.

5. Library postings of programs to be held in the meeting rooms must be approved by library leadership per the Distribution and Display Policy.

V. Food, Drink, and Catering Guidelines

1. Food and drink are permitted in meeting rooms. Meeting room users are able to bring in any type (homemade, purchased, catered, etc.) of refreshments. The library does not have a preferred caterer list.

2. Linens, tableware, and table decorations are to be provided and set up by either caterers or meeting room users.

3. Caterers must remove everything they bring into the library. This includes all trash, empty containers, and unused materials. Unless other arrangements have been approved by the Marketing & Special Events

Manager, this must be done immediately after the scheduled reservation.

4. Caterers must reset spaces they use during the reservation. This includes cleaning of floors, counters, and sinks.

VI. Rooms and Available Equipment

The following areas are available for use by individuals and groups when not being used for library programs or events. Please visit the library's website for room capacities and amenities.

- Community Room (combined A-B)
- Community Room A
- Community Room B
- Board Room
- Outdoor Reading Terrace

Individuals and groups who reserve Community Room B can utilize the culinary kitchen's sink, countertops, and outlets. Utilizing the kitchen appliances, cabinet contents, and other amenities is not permitted.

The library's programming rooms, such as the Youth and Teen Programming Rooms, are not able to be reserved by individuals and groups.

The following equipment may be utilized in meeting rooms depending upon which room is reserved. **Technology needs must be communicated at least one week in advance of the meeting date and time.** Library staff will not be available to monitor or operate equipment for non-library meetings.

- Extra tables and chairs
- Data projector with dropdown screen and/or video monitor with HDMI connectivity
- Dry erase board (Board Room)
- Podium (movable)
- Wireless internet
- Microphones (Community Room)
- Listening aids (Community Room)

VII. Reservations

1. Patrons who reserve a meeting room or are listed as an additional contact must be at least 18 years old. Primary or additional contacts must be present during the entire reservation.

2. Reservations for meeting rooms must be made by contacting the Marketing & Special Events Manager. Reservations will be taken over the phone or via email (events@marionpubliclibrary.org) and may be made up to three months in advance. Exceptions for meeting room reservations may only be approved by the ~~library Library director~~ Director in the case of extenuating circumstances.

3. Patrons who reserve a meeting room will receive an email confirmation from the Marketing & Special Events Manager. They may also call the library to confirm the reservation.

4. Key fobs and access codes to meeting rooms will be released only to the individual who made the room reservation unless they provide an additional contact on file.

5. All individuals and groups who reserve a meeting room are required to sign the Meeting Rooms Policy

Agreement.

6. Meeting rooms will be held for 15 minutes past the reserved time. If the reserving group does not arrive within that window, the room can be released to another group.

7. If a reserved room is no longer needed, groups are asked to contact the library to cancel the reservation.

8. Meeting room usage and booking is subject to staff availability and capacity.

VIII. Meeting Room Fees

1. Fees are dependent on the group using the space and their activity. The definitions of various meeting types are as follows:

   • **General Use:** Meetings of a civic group, organization, nonprofit, or government entity.
   • **Special Event:** Gatherings that serve to commemorate or celebrate. This includes receptions, open houses, reunions, showers, and parties.
   • **For-Profit:** Meetings for businesses and companies. This also includes any reservation where a fee is charged or goods are sold.

	Boardroom	Community Room (combined A-B)	Community Room A	Community Room B	Outdoor Terrace
General Use	Free	Free	Free	Free	Free
Special Event	$50	$200	$75	$125	$100
For-Profit	$100	$300	$125	$175	$150

2. Reservations have a one-hour booking minimum. Meeting room users should include setup and teardown time as part of their room reservation inquiryTime for setup and teardown is automatically blocked off 30 minutes before and after each reservation..

3. A 50% retainer is required at the time of the room reservation on Special Event and/or For-Profit meetings, with the remaining 50% paid one week ahead of the reservation date. **The user must notify the library in writing at least 7 days prior to the reservation date if it becomes necessary to cancel a reservation. The 50% retainer will not be refunded for cancellations within 7 days of the reservation or for non-use of the space.**

4. If the reservation must be postponed due to an emergency situation, the reservation may be rescheduled without penalty on a space-available basis, at the discretion of library staff. The library retains sole and exclusive right to revoke or cancel permission to use the facility. In the event of cancellation by the library, the library will provide as much notification as possible and will refund all fees paid or on deposit. The library specifically does not accept any responsibility for any expenses incurred or losses incurred by the user as a result of any library cancellation.

Meeting Room Policy Agreement

MARION Public Library

Agreement
The undersigned affirms they have read and agreed to abide by all rules and policies governing the use of meeting rooms at the Marion Public Library. The undersigned accepts responsibility for seeing that the room, furnishings, materials, and equipment at the Marion Public Library will be respected as public property and will be left in the same condition in which it was found. The undersigned further accepts responsibility for any damages incurred to library property either deliberately or through negligence on the part of members of this organization or persons in attendance and agree to pay for damages assessed by the City of Marion. The undersigned agrees that failure to abide by the rules and policies of meeting rooms will impact eligibility for future room reservations. The undersigned agrees to protect, save, and keep the City of Marion, the Library Board of Trustees, the Library Director, their agents, and employees forever free and harmless, and indemnified against any and all costs or expense arising out of any accident or other occurrence causing injury to any persons or property as a result of the use of the above premises.

Printed Name _____

Signature _____ **Date** _____

****

LIBRARY USE ONLY
Authorization Signature _____ **Date** _____

Study Room Policy

MARION Public Library

Scope of Policy			
Scope:	Use of Library Study Rooms	*Effective Date:*	Revised 02/17/2025~~11/13/2023~~

Provisions

I. General Rules Governing Use of Study Rooms

1. Study room capacities must be observed. Occupancy limits are posted in each study room and on the library website. Room capacity varies from 1-4 people.

2. The library is not responsible for loss or damage to the private property of individuals or organizations using study rooms.

3. Damage incurred to library property will be the responsibility of the person or group reserving the study room. ~~Cs and c~~osts will be billed accordingly. Any unpaid damages or cleaning fees may result in a group or individual being barred from future room use.

4. Decorations and other materials may not be fastened to library floors, walls, doors, windows, white boards, or furniture.

5. No group or user may reassign use of the room to another.

6. Study room users are responsible for ensuring the room is returned to an acceptable condition for the next user. It is understood that study rooms may be in use multiple times a day for multiple different groups. If the user notices any damages to the room, they must notify staff at the start of their reservation time.

7. Beverages with lids are allowed in study rooms. Food of any kind may not be consumed.

8. Study room users must follow all ~~Library~~ library policies rules and procedures.

II. Study Room Availability & Reservations

1. Study rooms are available on a first-come, first-served basis. Rooms may be reserved up to one (1) week in advance through the library's online reservation system, or at any staff desk.

2. Study rooms may be checked out for a maximum of two (2), two-hour periods per day.

3. If all study rooms are being used, patrons may check on future availability through the library's online reservation system or at any staff desk.

4. Patrons may check out study rooms even if fees on their cards exceed the limit.

5. Guests without library cards may check out study rooms, and they must leave their ID at the desk.

6. If a reserved room is no longer needed, groups are asked to contact the library to cancel the reservation.

7. If a study room remains vacant 15 minutes after the reserved time, the room can be released to another patron.

Dress Code

MARION Public Library

Scope of Personnel Policy – Dress Code			
Scope:	All Employees and All Applicants for Employment	*Effective Date:*	Revised 02/17/2025~~2/12/2024~~

General Policy
Work attire should reflect pride in the organization. Policy is intended to define appropriate work attire. The library recognizes the popularity of casual business dress and the positive effects of this on employee morale and creating a comfortable work environment.

Provisions:

Please use your best judgment in determining appropriate attire for work. The below are guidelines for attire that would not be appropriate:

Unacceptable Attire:
- Shorts
- Athletic wear including sweat pants and yoga pants (footwear excluded)
- Skirts that are more than 2 inches above the knee
- Flip flops
- Spaghetti strap tanks or tube tops unless underneath another piece of clothing
- Tank tops that have straps with less than 2 inches in width
- Beach wear
- Tops that expose the wearer's stomach
- Under no circumstances shall clothing contain or promote profane, vulgar, harassing, or discriminatory messages or themes.
- Non-opaque clothing
- Closed-toe shoes are required when working on the floor.
- Clothing should be in good repair and free of rips, holes, and tears.

All employees are expected to maintain a basic and proper level of hygiene. Excessive perfume/cologne should be avoided in consideration of other employees and the public.

All staff should wear their name badge and have their City-issued identification badge at all times when they are working.

Enforcement:
Managers are responsible for monitoring and enforcing this policy. The policy will be administered as follows:

1) If questionable attire is worn, the manager will hold a private discussion with the employee to advise and counsel the employee regarding the inappropriateness of the attire.

2) The employee may be asked to go home to change their attire if deemed inappropriate (unpaid).

3) Generally, repeated violations will result in disciplinary action up to and including terminating, however, depending on the severity of the offense an employee may be disciplined on his or her first violation.

4) Exceptions, with manager or director approval, may be made to this policy for programming purposes, library events, special occasions, etc.

5)4)

Meal Breaks

MARION Public Library

Personnel Policy – Supplemental-Meal Breaks			
Scope:	All Employees and All Applicants for Employment	*Effective Date:*	Reviewed 02/17/2025~~2/12/2024~~

Provisions
Supplementing SECTION 1, Part 1.09 of the City of Marion Personnel Policy

Meal Breaks

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An unpaid meal break of 30 minutes is granted to employees who work seven or more consecutive hours.

Paid Breaks

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A paid break of 15 minutes is granted to all employees working at least four consecutive hours; employees working six or more consecutive hours are provided a 20-minute paid break.

Because of the abbreviated Sunday work schedule, there are no breaks except for part-time staff working the full four-hour shift.

Professional Development

MARION Public Library

Personnel Policy – Supplemental-Professional Development			
Scope:	All Employees and All Applicants for Employment	*Effective Date:*	~~Revised~~ Reviewed 02/17/2025~~4/8/2024~~

General Policy

The purpose of this policy is to provide employees with an opportunity for professional development opportunities that increase their skills and enhance their contributions to the organization. An employee's work performance is vital to the success of our organization. Providing professional development opportunities to our employees is an investment in their careers and the organization's future.

Provisions

The Marion Library requires that its full-time and part-time professional and paraprofessional staff be certified by the State Library of Iowa, if the role requires it as determined by the Library Director. (see endorsement page at https://www.statelibraryofiowa.gov/index.php/libraries/training-consulting/continuing-education/endorsement)

Toward this end, the library will allow these staff members to use work time for continuing education; the library will also pay expenses including tuition/registration fees, required materials fees, and travel and meal expenses as necessary. Prior approval is needed for classes that require fees. Staff is responsible for keeping track of their credits/progress. Staff are also responsible for providing documentation of successful completion of and sessions paid for by the library.

Staff is expected to work with their manager to plan work time for continuing education opportunities well in advance of each session. If classes are scheduled outside of regular work hours, staff should ask for accommodation in that week's work schedule.

Staff doing continuing education sessions will get work time credit for actual contact hours; credit may not be taken for time spent doing assignments, class reading, or research.

In addition to the State Library of Iowa certification, there may be other opportunities for professional development. It is the expectation that the employees and the respective manager meet regularly to discuss professional development needs/opportunities. Professional development can be obtained through attendance at seminars, educational courses, webinars, and conferences.

Employees will work with his/her manager to put together a proposal requesting to attend an event, in accordance with City policy. Information provided should include: dates, title of program, location, all associated costs, relation of activity to current position or development need. Requests will be submitted to the Library Director for review. Applicability and availability of funds will dictate acceptance or declination. Upon satisfactory completion of the training/coursework, the employee must provide documentation to support completion to receive any eligible reimbursement per City policy. All receipts and City documentation must be provided within 3 business days upon return to the office from travel, or by month end, whichever is earlier. There is an expectation that the employee will provide report out to his/her manager (and potentially a larger group if there is benefit in sharing the information) on learnings and

action plan for utilizing the information.

Working from Home

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Provisions

It is occasionally necessary for employees, particularly managers, to work from home during their regularly scheduled work shifts.

Library managers are allowed to do this, provided this time does not impact service desk shift schedules. Paraprofessional staff must have advance permission from their manager. The staff working from home is expected to be on-call to return to the library if needed.

If the library is closed, or closes early due to unexpected circumstances, staff who have a City-issued tablet or laptop are expected to work from home for the rest of their shift. Staff should plan accordingly and in advance whenever possible and will be expected to work or take paid time off (if applicable). Staff who do not have a City-issued device will be paid for any shift they start and are asked to leave early due to unforeseen circumstances. Staff who have not yet reported to work and are unable to work from home will not be paid for that shift, but will have the opportunity to make up their hours within the same pay period if possible.

Chapter 10: Evaluating the Library Director

Looking back to **Chapter 2: The Five Primary Responsibilities of Iowa's Public Library Boards,** one of the responsibilities listed is to evaluate service and advocate for advancements. An important part of evaluating the effectiveness of library service is to evaluate the library director's job performance. Iowa's **Public Library Standards** require that boards conduct the director's job evaluation annually.

Trustees evaluate the director all the time--informally--by what they see happening in the library, by what they hear from the public, and by what they perceive as the library's reputation in the community. But such informal observations do not take the place of a formal job review process. The best way to evaluate the director's job performance is to use the current job description. Then develop a written evaluation based on specific criteria, determining how well the director is meeting the job description and accomplishing management goals.

There are many benefits to providing an annual evaluation of the director's work:

- ❖ Provides the director with a clear understanding of the board's expectations

- ❖ Ensures the director is aware of how well the expectations are being met

- ❖ Serves as a formal vehicle of communication between the board and director

- ❖ Identifies the board's actual concerns so that corrective action can be taken

- ❖ Creates an opportunity to review and acknowledge the director's accomplishments

- ❖ Documents annual accomplishments in meeting the library's strategic plan

- ❖ Demonstrates sound management practices and accountability to municipal officials and the community

A written evaluation allows the board and the director a system to communicate about how to improve library service. An annual evaluation provides a method to acknowledge and reward good performance as well as work with the director to correct inadequate areas of performance. If problems arise with the director's performance during the year, the board should discuss these problems with the director at that time, along with possible solutions. At the time of the annual evaluation, there should be no surprises.

A new director will need goals that assist in learning the position and should be evaluated more frequently than once per year. Typical practice is to provide a probationary evaluation after 6 months. If a director has been on the job for a long time, goals might reflect broader ideas such as providing new services.

Director Evaluation Considerations

Before creating a new evaluation form, check with your city to see if there is a job evaluation form already in use for other city employees or for other department heads. If so, discuss adapting that form; it may require revising the form to fit the library director's specific job duties. The following list provides points to consider when developing or adapting an evaluation form for the library director:

Implementing Board Decisions

❖ Are board decisions implemented on a timely basis?

❖ Once board decisions have been made, does the director support and not undermine them?

Preparing and Managing the Budget

❖ Is the preparation work completed in a timely manner for the board?

❖ Does the budget cover all necessary expenses?

❖ Are funds allocated or reserved for unanticipated contingencies?

❖ Are the funds allocated effectively?

❖ Are major corrections to the budget during the fiscal year avoided?

Hiring and Supervising Staff

❖ Are positive management/staff relations maintained?

❖ Are fair and equitable HR policies proposed for board adoption and then fairly administered?

- ❖ Is the hiring process designed to ensure that the best person is hired?

- ❖ Is the hiring process consistent with legal requirements?

- ❖ Does staff receive training adequate to perform their jobs?

- ❖ Is staff development encouraged for learning new skills? Is it supported with funding?

- ❖ Have peak service hours been identified and staff assigned accordingly?

- ❖ Are job descriptions current? Are staff functions analyzed periodically with the objective of combining or eliminating tasks or creating new assignments?

- ❖ Are staff workloads equitable?

- ❖ Does the director conduct staff performance evaluations regularly?

Managing the Collection

- ❖ How adequately does the library identify needs and interests in the community and translate these into the library's collection and services?

- ❖ Have priorities been established to enable the library to respond to a potential budget cut?

Implementing the Library's Strategic Plan

- ❖ Does the library have a current plan and does the plan reflect board priorities?

- ❖ Is the plan updated to reflect changing circumstances?

- ❖ Are the director's activities and accomplishments consistent with the plan?

- ❖ Is the plan flexible enough to allow for changing circumstances?

- ❖ Does the director provide enough information to the board about implementing the plan?

Promoting Library Services and Programming

- ❖ How effectively are current and new services communicated to the public?

- ❖ Are circulation trends, program attendance, reference questions, Internet use and other uses of the library tracked, analyzed, and needed changes made?

- ❖ Are services and programs producing the desired impact in the community?

Keeping Current

- ❖ Are innovations in service delivery and technology studied thoroughly and implemented if they fit the needs of the library and are proven to be cost effective?

- ❖ Does the director maintain current knowledge of best library practice?

- ❖ Is the staff encouraged and assisted in learning about best library practice?

Demonstrating Positive Behaviors

- ❖ Are "hard decisions" made and implemented or are they deferred or ignored?

- ❖ Does the director display initiative?

- ❖ Does the director make decisions objectively or do personal biases intrude?

- ❖ Is the director open with the board about both accomplishments and problems?

- ❖ Does the director set an example for other staff through professional conduct, high principles, good work habits, etc.?

Dismissing the Library Director

Probably the most stressful situation a library board can face is the potential dismissal of the library director. Boards that hire carefully, communicate well, nurture positive working relationships, and evaluate effectively should not have to experience this unpleasant task. Yet when all potential solutions have been exhausted and the problems still cannot be resolved, dismissal is a last resort.

Directors are usually dismissed only after serious infractions of library policy, violation of the law, or very poor performance coupled with unwillingness or inability to improve. **It is essential that the reasons for dismissal have been carefully documented.** The board has a responsibility to ensure that personalities and biases are not factors in any dismissal decision. The dismissal and/or appeals procedure should be described explicitly in the library's personnel policy and allow the director a fair hearing to discuss specific charges. A board should not begin a dismissal process unless it understands the implications, has consulted with the appropriate local government officials, believes its position is defensible, and has obtained appropriate legal advice from an attorney.

The following factors should be considered prior to making a final decision to dismiss a library director:

- ❖ Was there proof of a violation or a history of poor performance?

- ❖ Was there notice given to the director regarding the performance problem?

- ❖ Was the reason for termination related to library employment?

- ❖ Was there an investigation and documentation? Was the investigation fair and objective?

- ❖ Is there equal treatment of other library employees in similar situations?

- ❖ Is termination of the library director an appropriate disciplinary action? Even if the library director has done something wrong, has been given notice, and has not ceased the activity, is termination too harsh a penalty? Or would some other consequence be more reasonable?