

AGENDA
GREAT FALLS PUBLIC LIBRARY
BOARD OF TRUSTEES MEETING
Tuesday, June 25, 2024
Great Falls Public Library – Cordingley Room (Library Basement)
(Virtual access to meeting available upon request • 406-453-0349)
Notice: Meeting will be recorded via Zoom
4:30 P.M.

I. AGENDA APPROVAL

MOTION... THAT THE GREAT FALLS PUBLIC LIBRARY BOARD OF TRUSTEES APPROVE/DISAPPROVE THE AGENDA AS PRESENTED.

SECOND PUBLIC COMMENT BOARD DISCUSSION VOTE

II. STAFF INTRODUCTIONS

III. PUBLIC COMMENT

IV. ADOPTION OF THE MINUTES OF THE REGULAR MEETING HELD IN MAY (Pages 1-6)

MOTION . . . THAT THE GREAT FALLS PUBLIC LIBRARY BOARD OF TRUSTEES APPROVE/DISAPPROVE THE MINUTES AS PRESENTED.

SECOND PUBLIC COMMENT BOARD DISCUSSION VOTE

V. ACCEPTANCE OF THE FINANCIAL REPORTS (Pages 7-18)

- A. YEAR-TO-DATE MAY REPORT
- B. LIBRARY VENDOR SUMMARY FOR MAY
- C. GFPL FOUNDATION VENDOR SUMMARY FOR MAY
- D. MAY DONATION REPORT

MOTION . . . THAT THE GREAT FALLS PUBLIC LIBRARY BOARD OF TRUSTEES ACCEPT/NOT ACCEPT THE FINANCIAL REPORTS AS PRESENTED.

SECOND PUBLIC COMMENT BOARD DISCUSSION VOTE

VI. REPORTS (Pages 19-34)

- A. MANAGEMENT TEAM REPORT (COMMUNITY ENGAGEMENT)
- B. DIRECTOR REPORT
- C. STATISTICAL REPORT
- D. PERSONNEL REPORT
- E. GFPL FOUNDATION REPORT
- F. CHAIR REPORT
- G. BOARD REPORTS
- H. CITY/LIBRARY MANAGEMENT AGREEMENT COMMITTEE REPORT

VII. OLD BUSINESS

- A. PUBLIC LIBRARY STANDARDS: LIBRARY STANDARDS ROADMAP REVIEW – ACCESS TO LIBRARY SERVICES (Pages 35-36)
- B. PUBLIC LIBRARY STANDARDS POLICY REVIEW: CITY OF GREAT FALLS PERSONNEL POLICY MANUAL (Pages 37-120)

MOTION . . . THAT THE GREAT FALLS PUBLIC LIBRARY BOARD OF TRUSTEES APPROVE/DISAPPROVE THE CITY OF GREAT FALLS PERSONNEL POLICY MANUAL.

SECOND PUBLIC COMMENT BOARD DISCUSSION VOTE

VIII. NEW BUSINESS

- A. LIBRARY DIRECTOR ANNUAL PERFORMANCE EVALUATION (Pages 121-122)

Pursuant to MCA §2-3-203 (3) The presiding officer of any meeting may close the meeting during the time the discussion relates to a matter of individual privacy and then if and only if the presiding officer determines that the demands of individual privacy clearly exceed the merits of public disclosure. The right of individual privacy may be waived by the individual about whom the discussion pertains and, in that event, the meeting must be open.

If closed executive session is held, re-opening of the meeting and report on executive session.

MOTION . . . THAT THE GREAT FALLS PUBLIC LIBRARY BOARD OF TRUSTEES APPROVE/DISAPPROVE THE ANNUAL PERFORMANCE REVIEW OF THE LIBRARY DIRECTOR.

SECOND PUBLIC COMMENT BOARD DISCUSSION VOTE

IX. PROPOSALS/COMMENTS FROM TRUSTEES

X. ADJOURMENT

MOTION...THAT THE GREAT FALLS PUBLIC LIBRARY BOARD OF TRUSTEES ADJOURN THE MEETING.

SECOND VOTE

Great Falls Public Library
Board of Trustees Board Meeting
Tuesday, May 28, 2024
Great Falls Public Library – Cordingley Room (Basement of the Library)

(Virtual access to meeting was available upon request)
(zoom recording of meeting is available on the Great Falls Public Library YouTube page)

4:30 p.m.

BOARD MEMBERS PRESENT: Ms. Anne Bulger (via zoom), Ms. Jessica Crist, Ms. Noelle Johnson, Ms. Whitney Olson

BOARD MEMBERS ABSENT: Ms. Sam DeForest

EX OFFICIO BOARD MEMBERS PRESENT: Ms. Shannon Wilson – City of Great Falls Commissioner

EX OFFICIO BOARD MEMBERS ABSENT: Ms. Rae Grulkowski – Cascade County Commissioner

STAFF PRESENT: Ms. Tina Cowhick, Mr. Aaron Kueffler, Ms. Susie McIntyre, Ms. Sara Linder-Parkinson, Mr. Jake Sorich, Mr. Charles Weber

GUESTS PRESENT:

Keith Duncan – Resident of Great Falls, Richard Irving – Resident of Great Falls, Brianne Laurin – GFPL Foundation Executive Director, Jenn Rowell – The Electric (via zoom), Bill Tacke – Resident of Great Falls

Ms. Olson called the meeting to order at 4:30 pm.

I. AGENDA APPROVAL

Ms. Olson asked for an agenda approval.

Ms. Crist moved that the Great Falls Public Library Board of Trustees approve the agenda items as presented. Ms. Johnson seconded the motion. Ms. Olson opened for any board discussion or public comment. Upon hearing none, Ms. Olson called for a vote. Motion passed unanimously.

II. STAFF INTRODUCTIONS

Ms. Tina Cowhick and Mr. Charles Weber introduced themselves and talked about their positions at the Library and how they came to be at the Library. After questions from the board, they left the meeting.

III. PUBLIC COMMENT

Mr. Richard Irving, a resident of Great Falls, addressed the board. He stated his concern that the Safety Specialist are hanging out with the kids and not the unhoused patrons. He voiced his concerns that the visitor statistics record unhoused patrons going in and out throughout the day as multiple visits. He voiced his concern that the library is not warning people that Mango languages is saving voice prints. He voiced his concern that no one has questioned the Director on spending money to rent the Mansfield Theater for an event that didn't happen. He voiced his concerns with plans to move kids into the basement. He voiced his concern with the board packet not being on the screen during the board meetings. He also voiced his concerns with having to pay for a copy of the board packet

IV. ADOPTION OF THE MINUTES

Ms. Crist provided Mr. Kueffler with an email of spelling and sentence fragment corrections.

Ms. Johnson made a motion that the Great Falls Board of Trustees approve the minutes with changes that were submitted. Ms. Crist seconded the motion. Ms. Olson opened for any board discussion or public comment. Ms. Olson asked if there were any additional comments, upon hearing none she called for a vote. Motion passed unanimously.

V. ACCEPTANCE OF THE FINANCIAL REPORTS

Ms. Olson asked if anyone had questions regarding the Financial reports.

Ms. Bulger had a question regarding line item 365100 on page 9. She asked what the 10,000 was from. Ms. McIntyre stated that we had budgeted for 10,000. The year to date states \$313,740.67 has been received. She reminded the board that \$300,000 was from the foundation. The rest was from the Friends of the Library.

Ms. Johnson had a question regarding line item 435900 on page 10. With it being over 100%, she asked if there were any known expenses for the remaining two months. Ms. McIntyre stated that legal fees will be added to that line item in the coming months. Ms. McIntyre added that this line item also covers snow plowing, random drug testing, and sprinkler repair. She stated that this item is difficult to budget for.

Ms. Johnson ask for clarification on what the refunds were for under petty cash on page 11. Mr. Kueffler stated that it refers to multiple items; he explained that if someone pays for a lost book, then finds it at a later date, they are refunded through petty cash. If money is lost in the vending machine or copy machine, it is also refunded through petty cash.

Ms. Crist moved that the Great Falls Public Library Board of Trustees accept the financial reports as presented. Ms. Bulger seconded the motion. Ms. Olson opened for any board discussion or comment. Upon hearing none she called for a vote. Motion passed unanimously.

VI. REPORTS

Management Team Report

Mr. Sorich gave his communications report.

Ms. Bulger stated that she was glad to be receiving the press releases. She also stated that she likes the links to the videos.

Ms. Olson asked if the recorded board meetings are on the library's YouTube channel. Mr. Sorich stated they are hosted there, but can only be accessed through the library's website. Ms. Olson asked how are recordings of events decided. Mr. Sorich stated that we record every event; when he is able to attend events he also takes photographs. Ms. McIntyre added that if the presenter doesn't want an event recorded we will not record it.

Ms. Olson asked if the Great Falls Edit was new. Mr. Sorich stated that they started in April.

Director Report

Ms. McIntyre presented her director's report.

Statistical Report

No one had questions or comments concerning the Statistical Report.

Personnel Report

Ms. McIntyre added that Mr. Bob Miller has decided to retire. His last day will be August 1st. Ms. McIntyre suggests we hire for a replacement as soon as possible so there can be an overlap for training.

GFPL Foundation Report

Ms. Laurin presented the annual report from the Foundation. She reported that the Friends of the Library Book Sale had over \$14,000 in sales this year. The Foundation participated in Give Great Falls, \$1,600 was raised. The Foundation attended the Non-

Profit showcase at the Newbury. Ms. Lauren also stated that the Foundation has submitted a draft of the letter of agreement to the city for review.

Ms. Bulger asked if this letter of agreement will be able to tie up loose ends. Ms. Lauren believe it will. She stated that she has talked to the other libraries that have done remodels, and they have done the same thing. She believes this will allow tax payers to know the Foundation has raised the money, and has voted on and approved the design contract.

Chair Report

Ms. Olson had nothing to report at this time.

Board Reports

Ms. Crist stated that her, Ms. Cawley, and Ms. McIntyre are on the committee planning this year's Juneteenth celebration at Gibson Park. It has been well attended in the past. More information will be available soon.

City/Library Management Agreement Committee Report

Ms. Olson stated that her, Ms. Bulger, and Ms. McIntyre have met with city representatives twice to date. She stated that the city would like to discuss the length of the agreement; going from one year to something longer. They would also like to discuss the financial ramifications of the mills by agreement. We are now waiting on their next steps. Ms. Olson added that Mr. Bill Bronson was also present on behalf of the Library.

VII. OLD BUSINESS

PUBLIC LIBRARY STANDARDS: LIBRARY STANDARDS ROADMAP REVIEW – POLICY

Ms. McIntyre presented. She recapped the information that was presented in the board packet.

PUBLIC LIBRARY STANDARDS POLICY REVIEW: EMERGENCY PROCEDURES

Ms. McIntyre presented. She recapped the information that was presented in the board packet.

Ms. Johnson asked which jobs could be worked remotely. Ms. McIntyre stated it would depend on if the Library is called in to support the city in a crisis. The health department could have enlisted the library to do contact tracing. In that instance all staff could have participated remotely. Ms. Linder-Parkenson added that items for remote work can be

found for short term, but any extended time would possible result in staff being furloughed.

Ms. Olson asked if anyone had any additional questions. Upon hearing none she asked for a motion.

Ms. Johnson moved that the Great Falls Public Library Board of Trustees approve the Emergency Procedures policies as presented. Ms. Crist seconded the motion. Ms. Olson opened for any board discussion or comment. Upon hearing none she called for a vote. Motion passed unanimously.

VIII. NEW BUSINESS

LIBRARY FOUNDATION/DONATION BUDGET

Ms. McIntyre presented. She explained the information that was presented in the board packet.

Ms. Johnson asked where we were at in the \$873,000 that is needed. Ms. Laurin stated that the foundation has raised \$1.1 million designated for the library remodel project. It currently sits in a high yield account at D.A. Davidson. This will allow interest to be gained. Per the agreement, the Library will pay the initial invoices from the funds currently in the 2221 (Foundation/Donation) account. Once those funds are expended, when the Library receives an invoice, the Library will request the invoice amount from the Foundation. The Foundation will provide the funds to the Library who will then pay the invoice.

Ms. Olson asked if there was any more discussion. Upon hearing none she asked for a motion.

Ms. Bulger moved that the Great Falls Public Library Board of Trustees approve the Library Foundation/Donation budget as presented. Ms. Crist seconded the motion. Ms. Olson opened for any board discussion or public comment. Upon hearing none she called for a vote. Motion passed unanimously.

IX. PROPOSALS/COMMENTS FROM TRUSTEES

Ms. Olson asked if anyone has approached Ms. McIntyre regarding a board member becoming certified. Ms. McIntyre stated that no one has approached her. Ms. Olson stated that she would be interested. Ms. McIntyre said she would assist Ms. Olson in getting set up.

X. ADJOURMENT

Ms. Olson asked if there were any other questions or comments, upon hearing none, she asked for a motion.

Ms. Crist moved that the Great Falls Library Board of Trustees adjourn the meeting. Ms. Bulger seconded the motion. Ms. Olson called for a vote.

Motion passed unanimously.

Ms. Olson adjourned the meeting at 5:23 pm.

DRAFT

Monthly Budget Report

NOTE: The Library monthly financial statements are preliminary statements and may change each month due to timing of transactions. The monthly financials are fluid financial statements until the financial records are closed at fiscal year-end.

Account Number	Account Desc	May 2024		FY 2024YTD	
		Actual	Budget	Actual	% Used
2220 LIBRARY					
<i>Taxes</i>					
311010	REAL CURRENT AD VALOREM	\$ (53,317.73)	\$ (2,400,000.00)	\$ (1,704,925.32)	71.04%
311030	REAL DELINQUENT AD VALOREM	\$ (861.87)	\$ (6,000.00)	\$ (8,035.36)	133.92%
311050	REAL PROTESTED TAXES	\$ -	\$ -	\$ -	
311210	MOBILE HOME TAXES	\$ (242.03)	\$ (2,000.00)	\$ (2,914.80)	145.74%
311220	OTHER PERSONAL PROPERTY	\$ -	\$ (15,000.00)	\$ (305.21)	2.03%
312000	DELINQUENT TAX PENALTY & INTER	\$ (136.15)	\$ (1,500.00)	\$ (2,041.64)	136.11%
<i>Intergovernmental</i>					
334150	MISCELLANEOUS CULTURE & RECREA	\$ -	\$ (29,716.00)	\$ (37,063.74)	124.73%
335000	COAL TAX LIBRARY APPORTIONMENT	\$ -	\$ (2,359.00)	\$ (2,314.72)	98.12%
338000	LIBRARY SUPPORT	\$ -	\$ (177,000.00)	\$ (88,500.00)	50.00%
339000	PAY OF LIEU OF TAXES	\$ -	\$ -	\$ -	
<i>Charges for Services</i>					
343160	OFF-STREET LOTS TRANSIENT	\$ (50.00)	\$ (2,000.00)	\$ (3,538.00)	176.90%
346910	LIBRARY FEES MISCELLANEOUS	\$ (350.00)	\$ (10,100.00)	\$ (7,150.00)	70.79%
346920	LIBRARY SERVICE CHARGES MISC	\$ (354.00)	\$ (5,000.00)	\$ (4,322.71)	86.45%
346930	LIBRARY EQUIPMENT CHARGES MISC	\$ (1,064.36)	\$ (12,000.00)	\$ (11,670.32)	97.25%
346940	LIBRARY FACILITY CHARGES MISC	\$ (120.00)	\$ (800.00)	\$ (960.00)	120.00%
348360	CONVENIENCE FEE	\$ (0.71)	\$ -	\$ (2.60)	
346950	LIBRARY BOOK PURCHASES	\$ -	\$ (3,500.00)	\$ (930.00)	26.57%
<i>Fines and Forfeitures</i>					
351340	COLLECTION AGENCY FINES	\$ (97.99)	\$ -	\$ (457.80)	
352200	LOST BOOK FINES	\$ (503.86)	\$ (6,500.00)	\$ (5,802.01)	89.26%
<i>Investment Income</i>					
365100	CONTRIBUTIONS & DONATIONS	\$ -	\$ (10,000.00)	\$ (313,740.67)	3137.41%
368290	REFUNDS & REIMBURSEMENTS	\$ -	\$ -	\$ (50.00)	
362100	USBP CREDITS	\$ -	\$ -	\$ -	
<i>Other</i>					
371100	REGULAR INTEREST	\$ -	\$ (2,500.00)	\$ (21,463.95)	858.56%
REVENUE TOTAL		\$ (57,098.70)	\$ (2,685,975.00)	\$ (2,216,188.85)	83%
<i>Personal Services</i>					
411100	SALARIES & HOURLY	\$ 106,957.61	\$ 1,478,415.49	\$ 962,877.63	65.13%
412100	OVERTIME - REGULAR FULL-TIME	\$ -	\$ -	\$ -	
412300	OVERTIME - TEMPORARY	\$ -	\$ -	\$ -	
413150	VACATION TERMINATION	\$ -	\$ -	\$ 14,422.46	
413250	SICK LEAVE TERMINATION	\$ -	\$ -	\$ 8,774.29	
413600	HEALTH INSURANCE	\$ 22,616.44	\$ 354,456.04	\$ 225,757.67	63.69%
413700	LIFE INSURANCE	\$ 169.98	\$ 2,634.44	\$ 1,747.02	66.31%
413800	VEBA PAYOUT	\$ -	\$ -	\$ -	
414100	UNEMPLOYMENT INSURANCE	\$ 429.98	\$ 6,089.74	\$ 4,008.90	65.83%
414200	WORKERS COMPENSATION	\$ 872.26	\$ 9,718.95	\$ 7,147.65	73.54%
414300	FICA	\$ 6,420.50	\$ 87,957.87	\$ 58,851.73	66.91%
414350	MEDICARE	\$ 1,501.59	\$ 20,570.84	\$ 13,763.75	66.91%
414450	PERS	\$ 11,143.29	\$ 154,540.84	\$ 102,915.91	66.59%
415100	MISCELLANEOUS PENSIONS	\$ 1,533.00	\$ 20,715.79	\$ 14,008.98	67.62%
<i>Personal Services Totals</i>		\$ 151,644.65	\$ 2,135,100.00	\$ 1,414,275.99	66.2%
<i>Supplies</i>					
421100	PAPER & FORMS	\$ 422.56	\$ 3,000.00	\$ 1,736.87	57.90%
421200	COMPUTER ACCESSORIES	\$ 44.24	\$ 7,500.00	\$ 4,941.31	65.88%
421400	INSTRUCTIONAL & SAFETY SUPPLIE	\$ -	\$ -	\$ -	
421900	OTHER OFFICE SUPPLIES & MATERI	\$ 629.63	\$ 16,100.00	\$ 5,264.20	32.70%
423100	GAS, OIL, DIESEL FUEL, GREASE,	\$ -	\$ 7,693.00	\$ 3,140.10	40.82%
423900	OTHER REPAIR & MAINTENANCE SUP	\$ 1,385.10	\$ 7,719.72	\$ 7,719.72	100.00%
<i>Supplies Totals</i>		\$ 2,481.53	\$ 42,012.72	\$ 22,802.20	54.27%

Purchased Services

431100 POSTAGE, BOX RENT, ETC.	\$ -	\$ 4,000.00	\$ 4,000.00	100.00%
432100 PRINTING, FORMS, ETC	\$ -	\$ 200.00	\$ -	0.00%
433200 BOOKS & SUBSCRIPTIONS	\$ 4,087.65	\$ 80,000.00	\$ 54,143.75	67.68%
433500 MEMBERSHIPS & DUES	\$ -	\$ 1,000.00	\$ 578.00	57.80%
434100 TELEPHONE	\$ 243.86	\$ 3,200.00	\$ 2,711.07	84.72%
434120 FAX & OTHER TELEPHONE LINES	\$ 170.40	\$ 3,500.00	\$ 1,874.40	53.55%
434200 ELECTRIC UTILITY	\$ 1,269.93	\$ 75,000.00	\$ 48,778.56	65.04%
434300 GAS UTILITY	\$ 989.70	\$ 13,000.00	\$ 8,383.64	64.49%
434400 CITY SANITATION DISPOSAL	\$ 167.40	\$ 1,939.00	\$ 1,674.00	86.33%
434500 WATER UTILITY	\$ 200.09	\$ 2,841.00	\$ 2,104.82	74.09%
434600 SEWER UTILITY	\$ 102.32	\$ 1,327.00	\$ 780.66	58.83%
434700 STORM DRAIN UTILITY	\$ 83.93	\$ 911.00	\$ 839.30	92.13%
435260 COLLECTION AGENCY COSTS	\$ -	\$ -	\$ 104.85	#DIV/0!
435500 COMPUTER PROGRAMMING	\$ 521.55	\$ 50,000.00	\$ 44,423.08	88.85%
435900 OTHER PROFESSIONAL SERVICES	\$ 2,309.60	\$ 13,000.00	\$ 15,375.78	118.28%
435900 OTHER PROFESSIONAL SERVICES (mental)	\$ -	\$ 30,000.00	\$ -	0.00%
436200 BUILDING REPAIR & MAINT	\$ -	\$ 7,500.00	\$ 1,981.51	26.42%
436300 MAINTENANCE AGREEMENTS	\$ 6,249.76	\$ 23,000.00	\$ 18,956.56	82.42%
453200 OFFICE EQUIPMENT RENTALS	\$ -	\$ 1,600.00	\$ 1,109.07	69.32%
455150 CREDIT CARD FEES	\$ 87.78	\$ -	\$ 1,241.50	0.00%
<i>Purchased Services Totals</i>	\$ 16,483.97	\$ 312,018.00	\$ 209,060.55	67.00%

Other

459200 REFUNDS & REIMBURSEMENTS	\$ -	\$ 450.00	\$ 300,191.02	66709.12%
481300 CASH OVER/SHORT	\$ -	\$ -	\$ 0.50	
<i>Other Totals</i>	\$ -	\$ 450.00	\$ 300,191.52	66709.23%

Internal Service Charges

486110 HUMAN RESOURCES	\$ 2,493.42	\$ 29,921.00	\$ 27,427.62	91.67%
486370 VEHICLE & EQUIPMENT MAINT	\$ 355.17	\$ 4,262.00	\$ 4,135.85	97.04%
486520 FISCAL SERVICES	\$ 1,462.08	\$ 17,545.00	\$ 16,082.88	91.67%
486580 CENTRAL INSURANCE	\$ -	\$ 60,117.00	\$ 60,117.00	100.00%
486590 DEDUCTIBLE INSURANCE RECOVERY	\$ -	\$ -	\$ -	
486950 INFORMATION TECHNOLOGY	\$ 255.08	\$ 3,061.00	\$ 2,805.88	91.67%
486960 COMPUTER NETWORK	\$ 11.00	\$ 132.00	\$ 121.00	91.67%
486970 COMPUTER EQUIPMENT MAINT	\$ -	\$ 1,373.00	\$ 1,373.00	100.00%
488100 COMPUTER & EQUIPMENT LEASE	\$ 20.17	\$ 242.00	\$ 221.87	91.68%
<i>Internal Service Charges Totals</i>	\$ 4,596.92	\$ 116,653.00	\$ 112,285.10	96.26%

Capital Outlay

493100 IMPROVEMENTS OTHER THAN BUILDING	\$ -	\$ -	\$ -	
<i>Capital Outlay Totals</i>	\$ -	\$ -	\$ -	

	Actual	May-24	Budget	Actual	2024 YTD % Used
REVENUE TOTALS	\$ (57,098.70)		\$ (2,685,975.00)	\$ (2,216,188.85)	83%
EXPENSE TOTALS	\$ 175,207.07		\$ 2,606,233.72	\$ 2,058,615.36	79%
<i>Net Gain (Loss)</i>	\$ 118,108.37		\$ (79,741.28)	\$ (157,573.49)	
		Fund Balance Start of FY2024	\$ (455,452.70)		
		Estimated Fund Balance Start of FY2025	\$ (1,667,946.39)		



Income Statement

Through 05/31/24
Detail Listing

Include Rollup Account/Rollup to Object

Account	Account Description	Budget Amount	Annual	MTD	Actual Amount	YTD	Budget Less	% of	Prior Year
				Actual Amount	Actual Amount	YTD Actual	YTD Actual	Budget	Total Actual
Fund Category	Governmental Funds								
Fund Type	Special Revenue Funds								
Fund	2220 - LIBRARY								
	REVENUE								
31101	REAL CURRENT AD VALOREM	2,400,000.00		53,317.73	1,704,925.32	695,074.68		71	858,645.63
31103	REAL DELINQUENT AD VALOREM	6,000.00		861.87	8,035.36	(2,035.36)		134	7,274.45
31121	MOBILE HOME TAXES	2,000.00		242.03	2,914.80	(914.80)		146	3,353.83
31122	OTHER PERSONAL PROPERTY	15,000.00		.00	305.21	14,694.79		2	36,025.53
31200	DELINQUENT TAX PENALTY & INTEREST	1,500.00		136.15	2,041.64	(541.64)		136	1,624.61
33415	MISCELLANEOUS CULTURE & RECREATION GRANT	29,716.00		.00	37,063.74	(7,347.74)		125	2,132.42
33500	COAL TAX LIBRARY APPORTIONMENT	2,359.00		.00	2,314.72	44.28		98	29,650.99
33620	ON BEHALF REVENUE-NET PENSION LIABILITY	.00		.00	.00	.00		+++	36,373.00
33800	LIBRARY SUPPORT	177,000.00		.00	88,500.00	88,500.00		50	177,000.00
33900	PAYMENT OF LIEU OF TAXES MISCELLANEOUS	.00		.00	.00	.00		+++	1,469.30
34316	OFF-STREET LOTS TRANSIENT	2,000.00		50.00	3,538.00	(1,538.00)		177	5,505.84
34691	LIBRARY FEES MISCELLANEOUS	10,100.00		350.00	7,150.00	2,950.00		71	13,100.00
34692	LIBRARY SERVICE CHARGES MISCELLANEOUS	5,000.00		354.00	4,322.71	677.29		86	4,845.29
34693	LIBRARY EQUIPMENT CHARGES MISCELLANEOUS	12,000.00		1,064.36	11,670.32	329.68		97	11,028.61
34694	LIBRARY FACILITY CHARGES MISCELLANEOUS	800.00		120.00	960.00	(160.00)		120	750.00
34695	LIBRARY FOUNDATION BOOK PURCHASE PROGRAM	3,500.00		.00	930.00	2,570.00		27	4,056.15
34836	CONVENIENCE FEE	.00		.71	2.60	(2.60)		+++	.00
35134	COLLECTION AGENCY FINES	.00		97.99	457.80	(457.80)		+++	349.27
35220	LOST BOOK FINES	6,500.00		503.86	5,802.01	697.99		89	7,015.77
36210	USBP CREDITS	.00		.00	.00	.00		+++	46.66
36500	LIBRARY ENDOWMENT CONTRIBUTION	.00		.00	.00	.00		+++	100.00
36510	CONTRIBUTIONS & DONATIONS	10,000.00		.00	313,740.67	(303,740.67)		3,137	8,940.00
36829	REFUNDS & REIMBURSEMENTS	.00		.00	50.00	(50.00)		+++	18.25
37110	REGULAR INTEREST	2,500.00		.00	21,463.95	(18,963.95)		859	4,832.99
38310	OPERATING TRANSFER IN	.00		.00	.00	.00		+++	356,000.04



Income Statement

Through 05/31/24
Detail Listing

Include Rollup Account/Rollup to Object

Account	Account Description	Budget Amount	Annual	MTD	YTD	Budget Less	% of	Prior Year
		Actual Amount	Budget Amount	Actual Amount	Actual Amount	YTD Actual	Budget	Total Actual
REVENUE TOTALS		\$2,685,975.00	\$57,098.70	\$2,216,188.85	\$469,786.15	83%		\$1,570,138.63
EXPENSE								
41110	SALARIES & HOURLY	819,500.00	106,957.61	962,877.63	(143,377.63)	117		816,564.26
41315	VACATION TERMINATION	.00	.00	14,422.46	(14,422.46)	+++		1,166.41
41325	SICK LEAVE TERMINATION	.00	.00	8,774.29	(8,774.29)	+++		535.34
41360	HEALTH INSURANCE	210,387.00	22,616.44	225,757.67	(15,370.67)	107		210,956.83
41370	LIFE INSURANCE	1,682.00	169.98	1,747.02	(65.02)	104		1,733.70
41410	UNEMPLOYMENT INSURANCE	3,330.00	429.98	4,008.90	(678.90)	120		4,253.19
41420	WORKERS COMPENSATION	4,814.00	872.26	7,147.65	(2,333.65)	148		5,376.61
41430	FICA	50,810.00	6,420.50	58,851.73	(8,041.73)	116		48,257.40
41435	MEDICARE	11,884.00	1,501.59	13,763.75	(1,879.75)	116		11,286.02
41445	PERS	86,260.00	11,143.29	102,915.91	(16,655.91)	119		85,825.23
41510	MISCELLANEOUS PENSIONS	13,117.00	1,533.00	14,008.98	(891.98)	107		15,184.00
41915	FUNDED CONTINGENCY	933,316.00	.00	.00	933,316.00	0		.00
41919	ON-BEHALF PENSION EXPENSE	.00	.00	.00	.00	+++		36,373.00
42110	PAPER & FORMS	3,000.00	422.56	1,736.87	1,263.13	58		1,725.13
42120	COMPUTER ACCESSORIES	7,500.00	44.24	4,941.31	2,558.69	66		4,533.75
42140	INSTRUCTIONAL & SAFETY SUPPLIES	.00	.00	.00	.00	+++		181.80
42190	OTHER OFFICE SUPPLIES & MATERIALS	16,100.00	629.63	5,264.20	10,835.80	33		6,072.36
42310	GAS, OIL, DIESEL FUEL, GREASE, ETC	7,693.00	.00	3,140.10	4,552.90	41		3,310.84
42390	OTHER REPAIR & MAINTENANCE SUPPLIES	14,000.00	1,385.10	7,719.72	6,280.28	55		8,770.05
43110	POSTAGE, BOX RENT, ETC.	4,000.00	.00	4,000.00	.00	100		4,000.00
43210	PRINTING, FORMS, ETC	200.00	.00	.00	200.00	0		.00
43320	BOOKS & SUBSCRIPTIONS - NEWSPAPERS	80,000.00	4,087.65	54,143.75	25,856.25	68		23,237.62
43350	MEMBERSHIPS & DUES	1,000.00	.00	578.00	422.00	58		990.00
43410	TELEPHONE	3,200.00	243.86	2,711.07	488.93	85		3,205.04
43412	FAX & OTHER TELEPHONE LINES	3,500.00	170.40	1,874.40	1,625.60	54		1,537.70
43420	ELECTRIC UTILITY	75,000.00	1,269.93	48,778.56	26,221.44	65		32,011.86
43430	GAS UTILITY	13,000.00	989.70	8,383.64	4,616.36	64		12,497.78



Income Statement

Through 05/31/24
Detail Listing

Include Rollup Account/Rollup to Object

Account	Account Description	Budget Amount	Annual	MTD	Actual Amount	YTD	Budget Less	% of	Prior Year
				Actual Amount	Actual Amount	YTD Actual	YTD Actual	Budget	Total Actual
43440	CITY SANITATION DISPOSAL	1,939.00	167.40	1,674.00	265.00	86	2,261.10		2,261.10
43450	WATER UTILITY	2,841.00	200.09	2,104.82	736.18	74	2,607.90		2,607.90
43460	SEWER UTILITY	1,327.00	102.32	780.66	546.34	59	919.24		919.24
43470	STORM DRAIN UTILITY	911.00	83.93	839.30	71.70	92	929.56		929.56
43526	COLLECTION AGENCY COSTS	.00	.00	104.85	(104.85)	+++	.00		.00
43550	COMPUTER PROGRAMMING	50,000.00	521.55	44,423.08	5,576.92	89	45,094.45		45,094.45
43590	OTHER PROFESSIONAL SERVICES MISCELLANEOUS	43,000.00	2,309.60	15,375.78	27,624.22	36	49,042.37		49,042.37
43620	BUILDING REPAIR & MAINT	7,500.00	.00	1,981.51	5,518.49	26	22,644.98		22,644.98
43630	MAINTENANCE AGREEMENTS	23,000.00	6,249.76	18,956.56	4,043.44	82	19,839.46		19,839.46
45320	OFFICE EQUIPMENT RENTALS	1,600.00	.00	1,109.07	490.93	69	1,478.76		1,478.76
45515	CREDIT CARD FEES	.00	87.78	1,241.50	(1,241.50)	+++	662.98		662.98
45920	REFUNDS & REIMBURSEMENTS	450.00	.00	300,191.02	(299,741.02)	66,709	299.73		299.73
48130	CASH OVER/SHORT	.00	.00	.50	(.50)	+++	(.60)		(.60)
48611	HUMAN RESOURCES	29,921.00	2,493.42	27,427.62	2,493.38	92	34,377.00		34,377.00
48637	VEHICLE & EQUIPMENT MAINT	4,262.00	355.17	4,135.85	126.15	97	3,489.00		3,489.00
48652	FISCAL SERVICES	17,545.00	1,462.08	16,082.88	1,462.12	92	17,154.00		17,154.00
48658	CENTRAL INSURANCE	60,117.00	.00	60,117.00	.00	100	52,486.00		52,486.00
48659	DEDUCTIBLE INSURANCE RECOVERY	.00	.00	.00	.00	+++	7,500.00		7,500.00
48695	INFORMATION TECHNOLOGY	3,061.00	255.08	2,805.88	255.12	92	2,453.04		2,453.04
48696	COMPUTER NETWORK	132.00	11.00	121.00	11.00	92	186.96		186.96
48697	COMPUTER EQUIPMENT MAINT	1,373.00	.00	1,373.00	.00	100	909.00		909.00
48810	COMPUTER & EQUIPMENT LEASE	242.00	20.17	221.87	20.13	92	230.04		230.04
EXPENSE TOTALS		\$2,612,514.00	\$175,207.07	\$2,058,615.36	\$553,898.64	79%	\$1,604,150.89		
Fund 2220 - LIBRARY Totals									
REVENUE TOTALS		2,685,975.00	57,098.70	2,216,188.85	469,786.15	83%	1,570,138.63		
EXPENSE TOTALS		2,612,514.00	175,207.07	2,058,615.36	553,898.64	79%	1,604,150.89		
Fund 2220 - LIBRARY Net Gain (Loss)		\$73,461.00	(\$118,108.37)	\$157,573.49	\$84,112.49	214%	(\$34,012.26)		

Great Falls Public Library Vendor Summary (2220)

MAY 2024

6/15/2024

Vendor Name		MTD	YTD
ACE Hardware	(Building Supplies)	\$ 39.08	\$ 499.84
Alert Security Systems	(Security Camera)	\$ -	\$ 80.00
All State Signs	(Friends of the Library Banner)	\$ 90.00	\$ 90.00
Baker & Taylor	(Jobber)	\$ 3,262.24	\$ 16,507.99
Barnes & Noble Books	(Materials Purchased)	\$ -	\$ 576.81
Bellingham Public Library	(ILL Damaged item)	\$ -	\$ 21.95
Bronson, Bill	(Negotiation Council)	\$ 855.00	\$ 855.00
Builders First Source	(Maintenance Supplies)	\$ -	\$ 43.98
Cascade Electric	(Building Supplies)	\$ -	\$ 868.70
Castle Branch	(Background Checks)	\$ -	\$ 112.00
Cengage/Gale	(Jobber)	\$ 524.47	\$ 2,936.25
Center Point	(Jobber)	\$ -	\$ 89.88
Central Floor Covering	(Drive Up Window Blind)	\$ -	\$ 98.60
Central Lock and Safe	(Keys)	\$ -	\$ 53.00
Century Link	(Telephone)	\$ 243.86	\$ 2,465.98
Chemnet	(Drug Testing)	\$ 133.30	\$ 293.30
Communication Resources	(Phone/Network Systems)	\$ 410.00	\$ 3,426.00
CED - Consolidate Electrical	(Maintenance Supplies)	\$ 31.61	\$ 31.61
CM Russell Museum	(Museum Consort. Membership)	\$ -	\$ 500.00
CNA Surety	(Notary Fees)	\$ -	\$ 78.00
Crescent Electric	(Building Supplies)	\$ -	\$ 227.88
De Lage Landen	(Copier Agreement)	\$ 676.99	\$ 6,160.31
Deroche, Lynn	(Library Election Monitor)	\$ -	\$ 824.50
Envisionware	(renewal)	\$ -	\$ 5,761.65
Ferguson Enterprises	(Maintenance Supplies)	\$ -	\$ 240.78
FICO	(Garage Heater Repair)	\$ -	\$ 704.00
Fisher's Technology	(Copier Agreement)	\$ 1,013.49	\$ 4,411.60
GFPL Foundation	(Bridge Loan Repayment)	\$ -	\$ 300,000.00
Interactive Sciences	(Wowbrary Subscription)	\$ -	\$ 768.70
Johnson Madison Lumbar	(Building Supplies)	\$ -	\$ 176.73
Judith Basin Press	(Subscription)	\$ -	\$ 70.50
Kone, Inc	(Elevator Agreement)	\$ 4,559.28	\$ 8,327.28
MASCO	(Building Supplies)	\$ 287.20	\$ 1,821.99
Mastercard		\$ 2,792.63	\$ 22,756.59
Midwest Tape	(Jobber)	\$ -	\$ 9,692.71
Montana Air Cartage	(Courier Service)	\$ 435.60	\$ 5,854.20
MMIA	(Workers' Comp Insurance for Volunteers)	\$ -	\$ 47.54
Morrison-Maierle	(Network Maintenance)	\$ 37.50	\$ 37.50
Mountain Alarm Co.	(Annual Inspection)	\$ -	\$ 637.50
Mr. Green Landscape	(Snow Plow service)	\$ -	\$ 2,685.00
National Laundry	(Maintenance Supplies)	\$ 26.00	\$ 130.00
North 40 Outfitters	(Maintenance Supplies)	\$ -	\$ 145.02
OCLC Online	(Annual Service)	\$ -	\$ 6,648.19
Overdrive	(MT Library 2 Go)	\$ -	\$ 14,926.77
Petty Cash	(Refunds)	\$ -	\$ 206.56
Pitney Bowes	(Mailing Machine lease)	\$ -	\$ 1,109.07
Ron Hall Sprinklers	(Sprinkler Repairs/Winterize, lawn service)	\$ 394.00	\$ 961.95
Shelby Promoter	(Subscription)	\$ -	\$ 45.00
State of Montana	(Elevator Insp.,Boiler permit, Montana Shared Library)	\$ -	\$ 27,904.95
The Tire Guys	(Maintenance Supplies)	\$ -	\$ 26.45
Unique	(Collections Service)	\$ -	\$ 104.85
Vision Net, Inc	(Internet Service)	\$ 170.40	\$ 1,704.00
WX COX	(Jobber)	\$ -	\$ 6,012.65
		\$ 15,982.65	\$ 460,761.31

Great Falls Public Library Vendor Summary (2220)

MAY 2024

6/15/2024

Mastercard Transaction Breakdown			
Amazon	USB Cable	\$	6.74
Amazon	Pens and Toner	\$	37.80
Amazon	Tech Services Supplies	\$	36.68
Amazon	Materials Purchased	\$	84.94
Encompass Supply	Maintenance Supplies	\$	1,001.21
Englewood Industrial Solutions	Tech Services Supplies	\$	385.88
Evonence	Google Services	\$	521.55
Havre Daily News	Annual Subscription	\$	216.00
Namebadges.com	New logo name tags for staff	\$	383.83
Staples	Heavy duty stapler and laminating sheets	\$	118.00
TOTAL:			\$2,792.63

Great Falls Public Library Foundation Vendor Summary (2221)

MAY 2024

6/15/2024

Vendor Name		MTD	YTD
4Imprint	(Community Engagement Swag)	\$ -	\$ 5,800.36
	(New Logo Banners, Parking Signs & Poles,		
	Storywalk replacement plixi)	\$ 510.00	\$ 2,079.00
All State Signs			
Baker & Taylor	(Jobber)	\$ 9,239.03	\$ 80,724.20
Barns & Noble	(Jobber)	\$ -	\$ 868.50
BookPage	(Jobber)	\$ -	\$ 402.00
Butte Silver Bow	(Subscription)	\$ -	\$ 18.39
Carrier, Jamie (Lucky Valentines)	(Music in the Park)	\$ -	\$ 400.00
Cascade Courier	(Subscription)	\$ -	\$ 40.00
Cascade Electric	(Disconnect Band Shell Power)	\$ 88.00	\$ 88.00
CenterPoint	(Jobber)	\$ 44.94	\$ 359.52
Choteau Acantha	(Subscription)	\$ -	\$ 47.00
City of Great Falls - Mansfield	(Gathering of Families)	\$ -	\$ 1,495.00
City of Great Falls - Parking	(Curtesy Parking Spots)	\$ -	\$ 900.00
Clayton, John S.	(Adult Program)	\$ -	\$ 28.00
Creative Empire	(Mango Language)	\$ -	\$ 5,700.00
DELL Marketing	(FAP - Public Computer Upgrades)	\$ -	\$ 26,771.39
Downtown Great Falls	(Parade of Lights/Xmas Stroll)	\$ -	\$ 80.00
Dragons Are Too Seldom	(KP/YA performer)	\$ 750.00	\$ 750.00
Einan, Jerry	(Custom built staff mailboxes)	\$ -	\$ 600.00
Falls Print Works	(Tech Service Supplies)	\$ -	\$ 282.00
Gale/Cengage	(Jobber)	\$ -	\$ 3,389.56
Gale/Cengage	(Chilton Database FAP)	\$ -	\$ 3,038.76
Graham, Lela	(Reimbursement for Food at event)	\$ 51.86	\$ 51.86
Great Falls Tribune	(Subscription)	\$ -	\$ 422.16
Hale, Brandon (The Dirty Shame)	(Music in the Park)	\$ -	\$ 2,000.00
HUB International	(Notary bond)	\$ -	\$ 40.00
Hughs-Bryant, Penny	(Open Books book Club)	\$ -	\$ 350.00
InfoUSA Marketing	(MT Business Directory)	\$ -	\$ 520.00
Keller, Steve	(Music in the Park)	\$ -	\$ 600.00
Lewis & Clark Int. Cntr.	(Adult Program)	\$ -	\$ 600.00
LinkedIn Learning	(Subscription)	\$ -	\$ 13,125.00
Little Jane & the Pistol Whips	(Music in the Park)	\$ -	\$ 600.00
Mastercard		\$ 2,930.95	\$ 31,053.45
Midwest Tape	(Jobber)	\$ -	\$ 11,555.58
MNI Manufacturers' News Inc	(Subscription)	\$ -	\$ 106.90
Montana Repertory Theater	(Odyssey Performance)	\$ -	\$ 900.00
Friends of MT Shakespeare in the Parks	(Hamlet performance)	\$ 2,325.00	\$ 2,325.00
National Laundry	(table linens)	\$ 14.25	\$ 100.70
Overdrive	(MT Library 2 Go - Advantage)	\$ -	\$ 16,000.00
Penworthy Company	(Jobber)	\$ -	\$ 1,193.48
Petty Cash	(Reimbursement for Refunds)	\$ -	\$ 56.65
ProQuest	(Tribune 35MM Positives)	\$ -	\$ 3,775.28
Reiman, Clint	(Music for Event)	\$ 500.00	\$ 500.00
Roggow, Alyssa	(Speaker Series)	\$ -	\$ 150.00
Ron Hall Sprinklers	(Park Repair)	\$ -	\$ 1,432.50
Rowland, Russell	(Speaker Series)	\$ -	\$ 200.00
Rowman & Littlefield	(Jobber)	\$ -	\$ 107.67
Rural Dynamics	(VISTA)	\$ -	\$ 1,000.00
Strutz, Curt	(Adult Program)	\$ -	\$ 400.00
TC Glass	(Storywalk Plexi-glass)	\$ -	\$ 52.50
Tilleraas Landscape	(Park Cleanup-repair)	\$ -	\$ 14,076.25
Wendt Advertising	(Logo Design and Rebranding)	\$ 10,865.00	\$ 20,517.50
Wingfoot Plastic	(New Logo Library Cards)	\$ -	\$ 2,895.78
Zoobean	(KP/YA Beanstack Plus)	\$ -	\$ 1,813.90
Credits			
		\$ 27,319.03	\$ 262,383.84

Great Falls Public Library Foundation Vendor Summary (2221)

MAY 2024

6/15/2024

Mastercard Transaction Breakdown		
Amazon	Materials Purchased	\$ 89.57
Amazon	KP/YA Supplies	\$ 83.42
AT&T	Bookmobile Hotspot	\$ 233.85
Cassiopeia	Materials Purchased	\$ 45.56
Copper King Hotel	MLA Rooms	\$ 1,068.96
Home Depot	KP/YA Supplies	\$ 49.94
Identity Screen Printing	Safety Specialists Shirts	\$ 374.00
National Council for Behavioral Health	Mental Health Workshop	\$ 966.45
Paddle.net	OPAC software	\$ 19.20
TOTAL:		\$ 2,930.95

GREAT FALLS PUBLIC LIBRARY
DONATIONS

MAY DONATIONS

IN MEMORY OF

Andy and Zander Blewett	\$ 30.00	In Memory of Arylene Reichert (NF)
	\$ 30.00	In Memory of Larry Lucero (NF)
	\$ 30.00	In Memory of Maxine Robertson (NF)
	\$ 30.00	In Memory of Charlie Abernathy (NF)
Susie McIntyre	\$ 30.00	In Memory of Allen Woods (Hockey Book)

FOUNDATION

GFPL Foundation	\$ 2,460.00	John Elmer Smith funds
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JUNETEENTH

Graybill, Turner and Jessica	\$ 100.00	Juneteenth
Neighborworks GF	\$ 500.00	Juneteenth

OTHER

AAUW	\$ 1,000.00	Best Use Donation
Anonymous	\$ 424.90	For flowers in front of library
Book Sales	\$ 489.00	Withdrawn Book Sales
Twentieth Century Book Club	\$ 100.00	Bookmobile Expenses

TOTAL: \$ 5,223.90

Community Engagement Coordinator Report Board Meeting 6.25.24

My last report was given in December of 2023, a lot of wonderful things have happened since then.

Programming

- Memory Café – This program is in partnership with MSU Extension to provide a space for folks with memory loss and their caregivers to come and learn together and from each other. MSU Extension has lost their position that supported this program, so we are waiting for the replacement to come through. I am currently working with the larger state group and with local organizations to continue to host the program.
- Author Talks – Author Talks are still continuing in the Cordingley Room. We have had Allen Jones, Jake Sorich, Craig Lancaster, John Clayton, Chris La Tray and many others. For the future, I have A.J. Otjen with her book ***Burned Over***, Chris La Tray promoting his new book ***Becoming Little Shell***, and more.
- Book Clubs – We currently have 5 traditional book clubs hosted by the Library, 1 hosted by Sober Life with the Library, and 1 Silent Books Club that I run. I have been in communication with other groups about starting book clubs, including Brush Crazy and doing a book club and having them create a painting that we can do during the discussion. That is still in conversation, though.
- Summer Music in the Library Park – Summer Music is booked and ready to go. I have gathered \$2,400 in sponsorships for this year, including an event tent donated by SCHEELS. The line up is incredible, and I hope everyone can make it. The best booking I made is having Supaman perform in July, the community is very excited about that.
- Black Heritage Evening – BHE went off wonderfully and we had 101 people in attendance.
- Jewish Heritage Evening – This new program brought a lot of excitement and brought 35 people to the Library. Plans for next year are already being made.
- International Women’s Day Celebration – We brought 4 young women from the local high schools in to talk about their lives and their hopes for the future. The Q&A style program allowed for open conversations and a great evening.
- Mental Health First Aid – This was done with Many Rivers Whole Health where we provided 60 spots for the community to come out and be certified in Mental Health First Aid. We had 44 folks get certified over two days.
- Summer Library Bash – Over 100 people came out to celebrate the Library on June 8th. This party was a large success, and made even better by having live music, Jamie Ford as our Keynote speaker, and an amazing raffle basket donated by local companies.
- July 4th Parade – I would love to have folks volunteer with us in the July 4th Parade! The parade will start at 11 AM downtown.
- Summer Reading – Summer Reading is in full swing and I have already given out over 100 BINGO sheets. Our sponsors for this are Bighorn Outdoor Specialists and SCHEELS
 - The Adult Summer Reading program will have an end of season party in conjunction with the kids’ program, but I also scheduled us for a pint night at Annie’s Tap House downtown for an “after party” of sorts.

- Bookworms United – The 50 book challenge is still going on, and we are starting to see some folks return their packets. One came back with an incredibly powerful note, which is attached to this report.

Community Partnership

We have worked with a variety of organizations in the last few months to increase our outreach and partnership. Here are some of those groups:

- AWARE, Inc. – I have worked with AWARE to start signing the adults in group homes up for library cards and to come to the Library. I have done a couple of programs with them as well, and look to expand that relationship to better work with their clients.
- Little Shell Tribal Health – They have started to come to the Library on Wednesday mornings to help sign people up for Medicaid, and to assist with medical questions.
- Montana Women Vote – Encouraging voter registration here at the Library on Wednesday afternoons.
- Great Falls Development Alliance – They want to start coming in for meetings here at the Library, and potentially doing more with us in the future.
- Juneteenth – We are celebrating Juneteenth on June 22nd from 12-3 PM in Gibson Park. We are working with a variety of community partners including the YWCA, Malmstrom Airforce Base, Alexander Temple, and community folks to plan this event.
- Great Falls Area Community Foundation – This nonprofit organization has started to host board member trainings in town to help bring education and opportunity to nonprofits that may not be able to go to higher end trainings. We are working with them to bring these opportunities to Great Falls.
- Department of Public Health and Human Services – They are coming out in July to do a 2 day clinic for estate planning. Although this event is more or less their own doing, they did come out during Give Great Falls to talk about the importance of getting all documents in order and what happens if ones documents are not in order.
- Alzheimer’s Association – We work with the Association in conjunction with MSU to do Memory Café, but we also had the opportunity to do a Alzheimer’s Workshop which was very well received by the Great Falls public.
- Rural Dynamics – They are the ones who run the Tax Help MT in the Cordingley Room.

Volunteer Management

The Volunteers at this Library are incredible. We are truly lucky to have them. I would love to create a training document, however, to make sure that all volunteers get the same information. I will be coming up with this training/orientation over the next couple of months.

We get applications for volunteers weekly, and I feel like we need more general things for volunteers to assist with so that we can have folks in regularly. Shelving is no longer a need, and only so many folks are interested in dusting.

Art in the Library

July & August – Robert Finemann

September & October – Still solidifying

November & December – Bonnie Seaburg and Studio 706 Artist Guild

2024

Reading Categories

- 200 Pages or Fewer
- 2023 Montana Book Award Nominee
- 400 Pages or More
- A Book From a Friend
- A Book From a Library Display
- About a Real Person
- Anthology or Collection
- An Old Favorite
- Art or Craft
- Author Shares Your Zodiac Sign
- Author Used a Pen Name
- Author's Last Name Starts with a J
- Author's Photo on the Back Cover
- Blue Cover
- Book from a Series
- Book You Abandoned in the Past
- Business, Marketing or Entrepreneurship
- Civil Rights
- Classic You've Been Avoiding
- Country in the Title
- Current Event
- Environmental
- First Time Publishing Author
- Flowers on the Cover
- Genre-bending
- Job Title in the Title
- Author Used a Pen Name
- Made into a Movie/Show
- Magic
- Mindfulness/Self-improvement
- Mystery
- Native Author
- Published in 2024
- Question in the Title
- Read it for the Title
- Recently Challenged
- Recently-deceased Author
- Revenge
- Science Fiction
- Seasonal
- Set During a War
- Set in a Place You'd Like to Visit
- Spooky
- Sports
- Takes Place in a Foreign Country
- Three Words in the Title
- Transportation
- Western
- Written by a Josephine Miles Award Winner
- Young Adult Fiction

*Visit the library's website for more info and suggested titles.

Great Falls Public Library

presents

BOOKWORMS UNITED

Read one book in each of the 50 categories by December 27 and win a prize!

GUIDELINES

- The Great Falls Reads challenge begins on Tuesday, January 2 and ends on Friday, December 27, 2024.
- The challenge is open to all Great Falls Public Library cardholders.
- One book per category, one category per book, for a total of 50 books read within 2024 by December 27.
- Use the enclosed reading log to track your progress, or create your own log. Record all books read for the challenge on your reading log.
- To be rewarded for completing the challenge, submit your completed log to the library by December 28 for staff verification.
- Books read for other reading programs, book clubs or assignments can be counted toward the challenge, provided they fit into the categories.
- Books in print, audio, and electronic formats will count toward the challenge.

Thank you for this Bookworms United event. My father passed away in 10-2020 and I stopped reading. I didn't know how to read anymore without having him around to talk about what I read. We always read the same books and had our own father/daughter book club. 😊 This event gave me a goal and now my desire to read all day is so strong. I'm so happy since getting back into my books.

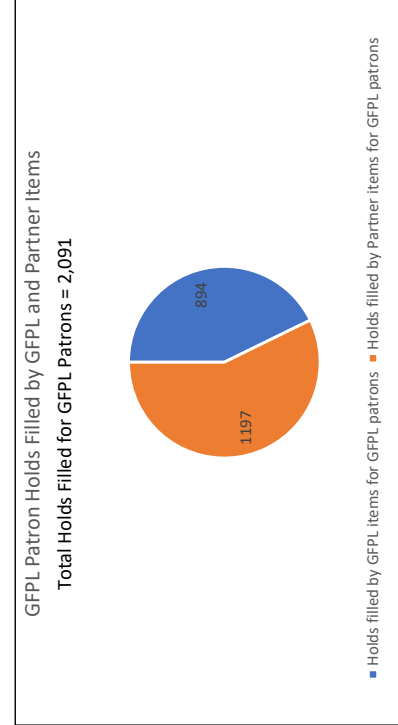
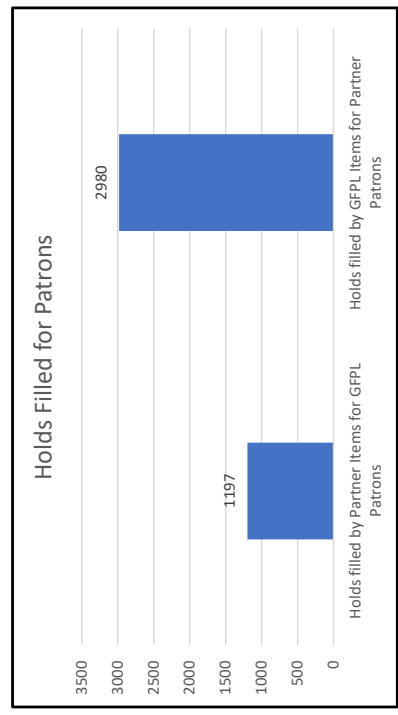
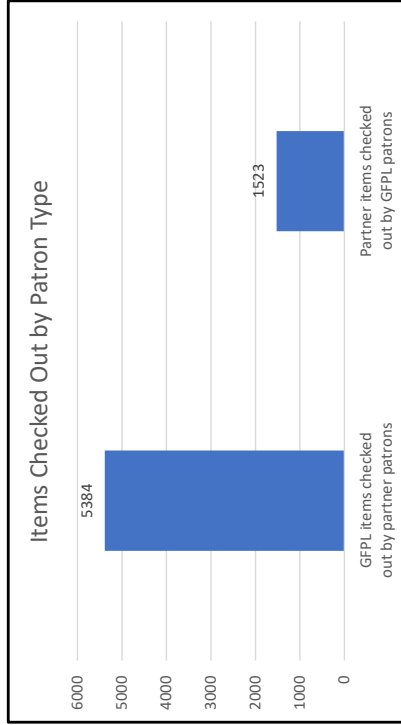
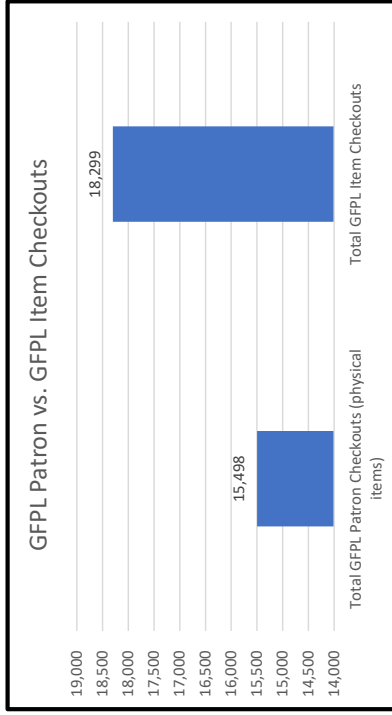
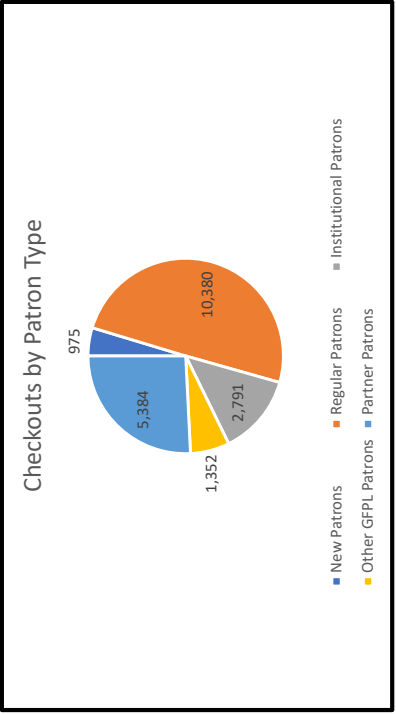
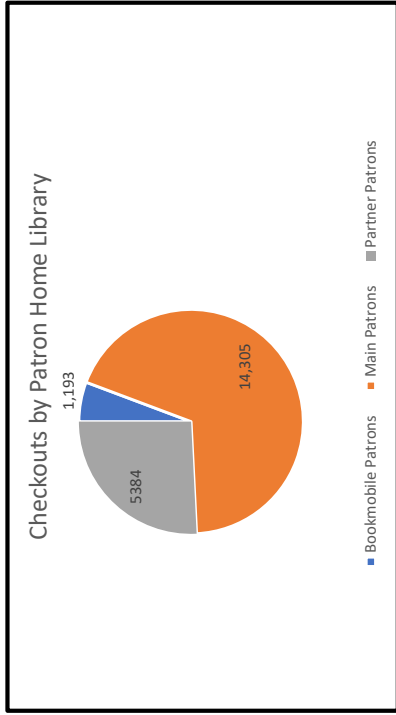
Director's Report
Great Falls Public Library
June 2024

1. **MILL LEVY IMPLEMENTATION: EXPANDED SERVICES** Thanks for those who were able to attend our Summer Bash. We made promises and we are delivering on them. We've already improved access by providing more educational programming and providing access to more digital resources—including eBooks, language resources and FREE online classes for job seekers and local business owners. Library parking has been free since July 2023. As of June 9th, the Library is open 7 days a week, the book mobile is providing 6 days a week and our homebound service has started. We have started weekly Open Tech Hours to go with our expanded library programming. June also launches our biggest ever summer reading programs for kids and adults.
2. **NEW LOGO AND WEBSITE:** We have implemented our new Library Logo and launched our new website. There were a few hiccups in the website transition—especially with the calendar of events. We've gotten great feedback on both. Huge thanks to all the Library staff who worked on these big projects.
3. **LIBRARY SAFETY:** The Library bandshell has been removed. Staff have worked hard to clean-up the park and it looks great. Special thanks to John C. and Bob M. for their efforts. We have wonderful plans for the Summer Music in the Park series which will still take place in the Library Park. Big thanks to all of our Summer Music sponsors especially Scheels for allowing us to borrow their performance tent!
4. **MONTANALIBRARY2GO MAGAZINES:** Due to cuts in the Montana State Library budget, they will not be able to support the MontanaLibrary2Go magazine access for FY2025. The total cost for the Consortium to provide access to the magazines collection is \$24,000 per year. Over the last 12 months, Great Falls Public Library patrons have had 11,243 online magazine checkouts (average 937/month). The MontanaLibrary2Go selection team is working with the membership to find funding. This may result in an increase in our MontanaLibrary2Go membership (estimated at about \$1,100.00)
5. **AUTORENEWAL:** As of June 8th, the Montana Shared Catalog staff has enabled autorenewal for Great Falls Public Library patrons. The system will now automatically renew any items that are due and are eligible to be renewed. (Hotspots or other items with restrictions will not be renewed. Items that have already been renewed twice will not be renewed. Items with holds will not be renewed.) This may have an impact on monthly statistics going forward. We believe that it will serve the patrons. Once an item is overdue, patrons are unable to log-in to their accounts and renew items or be able to access MontanaLibrary2Go items.
6. **BUDGET UPDATE** We have had our Departmental Budget meetings with the City Manager and the Fiscal Department. An updated budget and the accompanying notes are in your packet.
7. **REMODEL DESIGN UPDATE:**
Funding: The City Commission approved the Cushing Terrell contract for the Library remodel design. The Foundation Letter of Understanding with the City is on the contracts list to be approved by the City Commission at their June 18th Commission meeting.

Design:

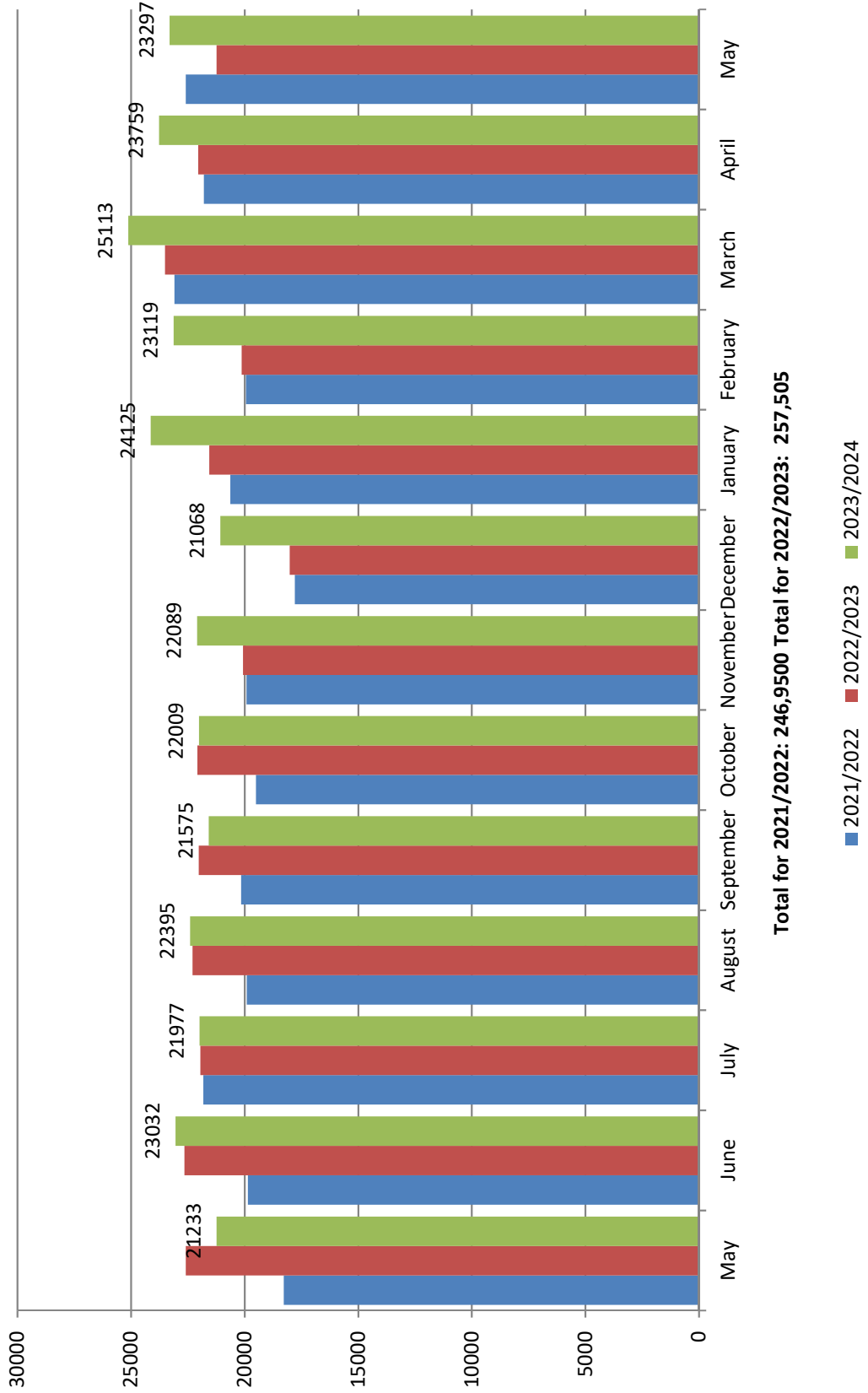
- CT's Architectural Team has completed a full 3-dimensional model of the existing building, both interior and exterior, complete with landscape. The board has access to the matterport link, and the CT design team is using it as a basis for their work.
- CT's Architectural Team has also broken the existing program down to match the masterplan and correspond to the model.
- CT electrical, mechanical, and structural teams will be on site throughout the next two weeks to supplement their model with the systems relevant to their work.

MAY 2024: PATRON CHECKOUTS & HOLDS of PHYSICAL ITEMS



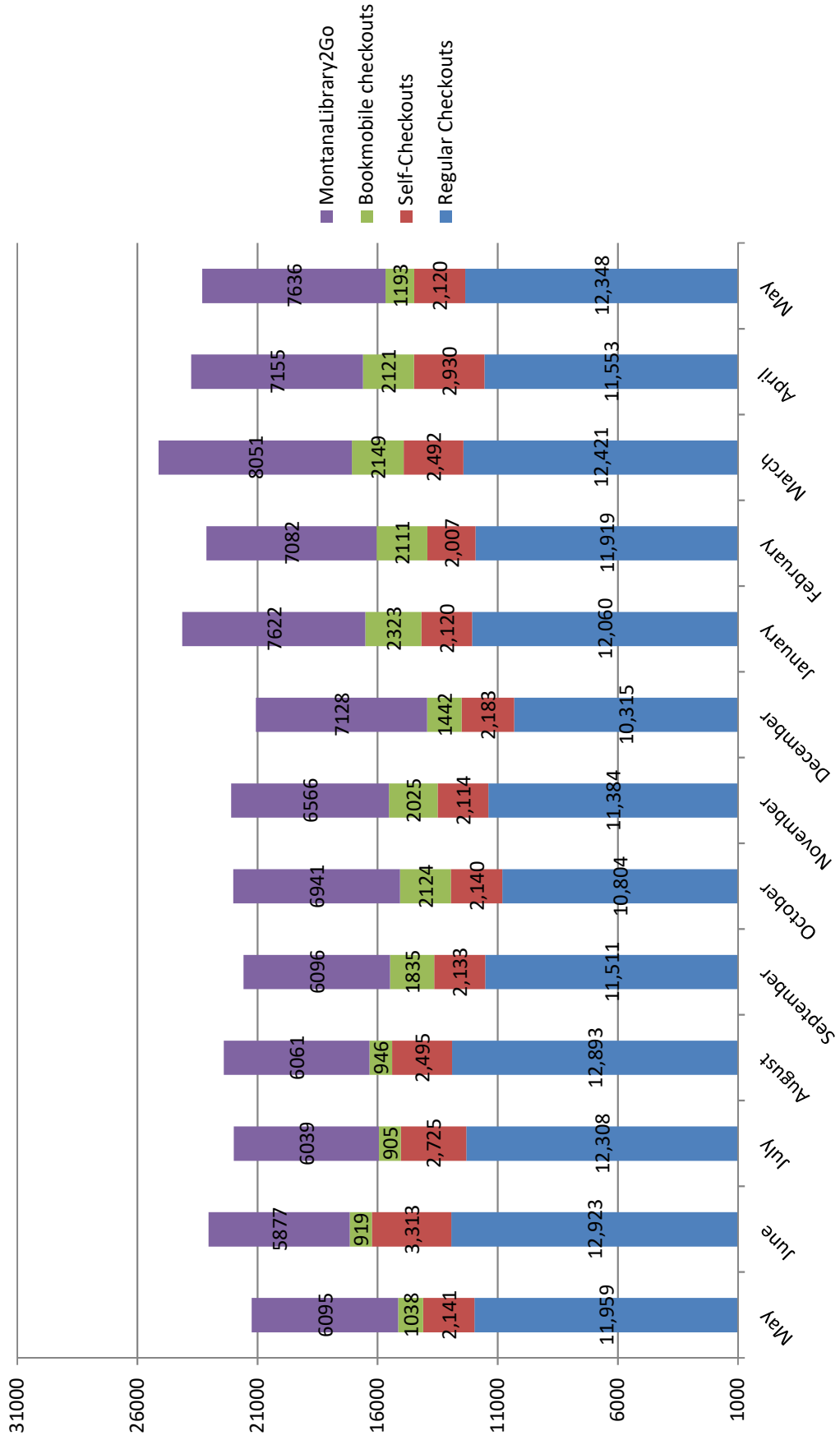
Total Monthly Circulation

Total Circulation Previous 12 Months: 273,558

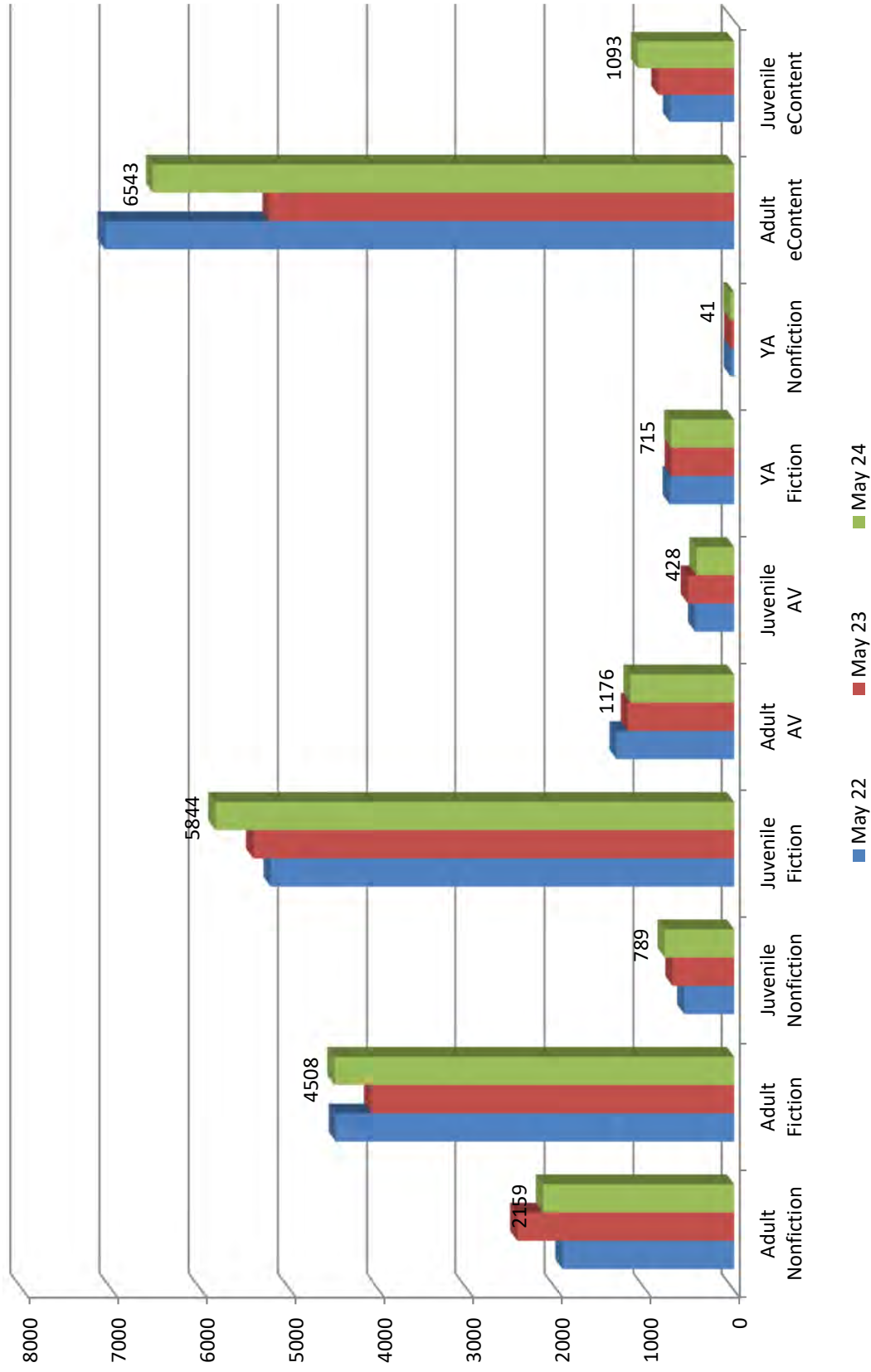


Self-Check, Bookmobile, MontanaLibrary2Go and Regular Check Outs

12 Month total = 273,558

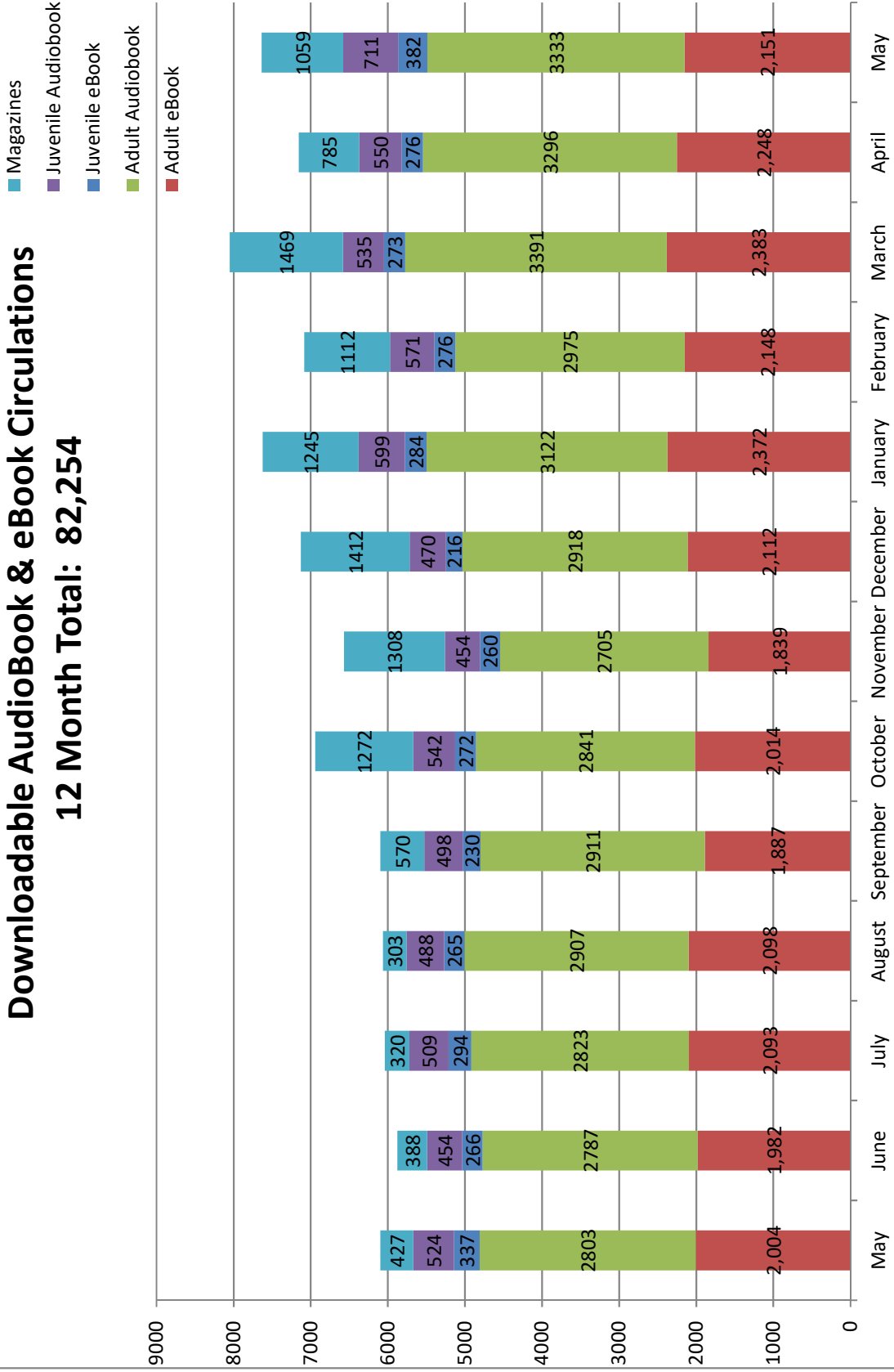


Comparison of Circulation Totals May 2022, 2023, and 2024



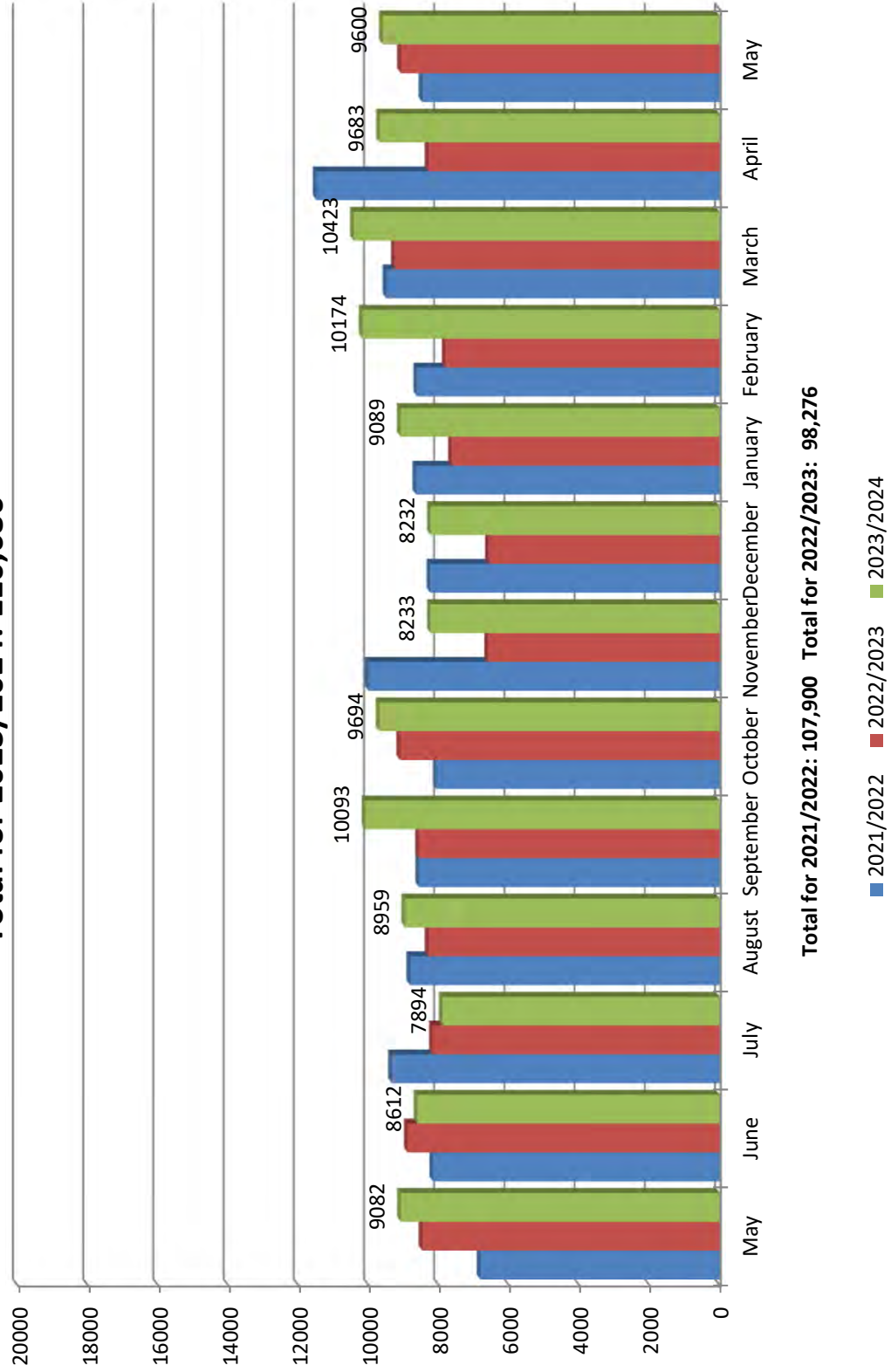
Downloadable AudioBook & eBook Circulations

12 Month Total: 82,254

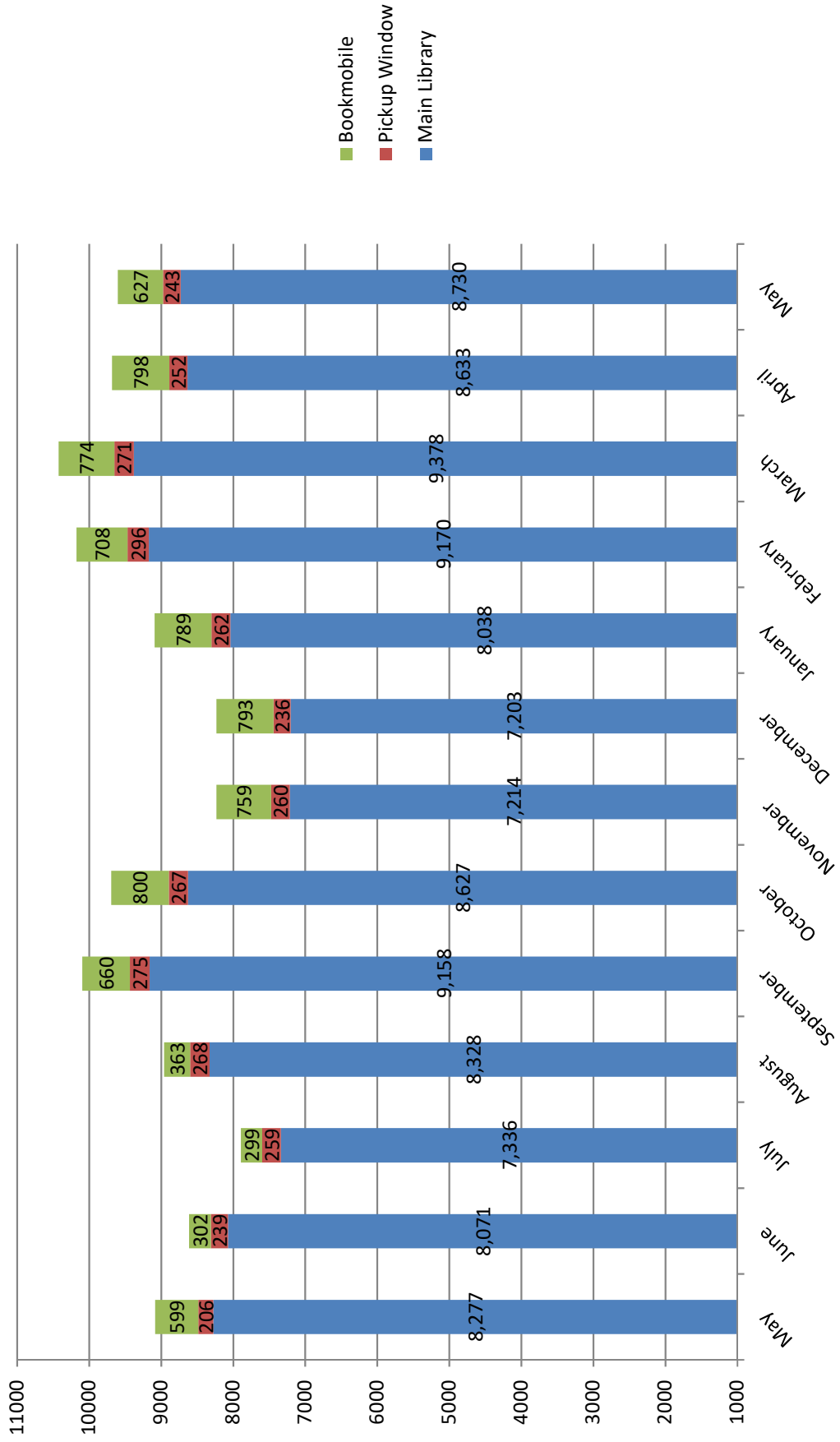


Total Monthly Patron Attendance

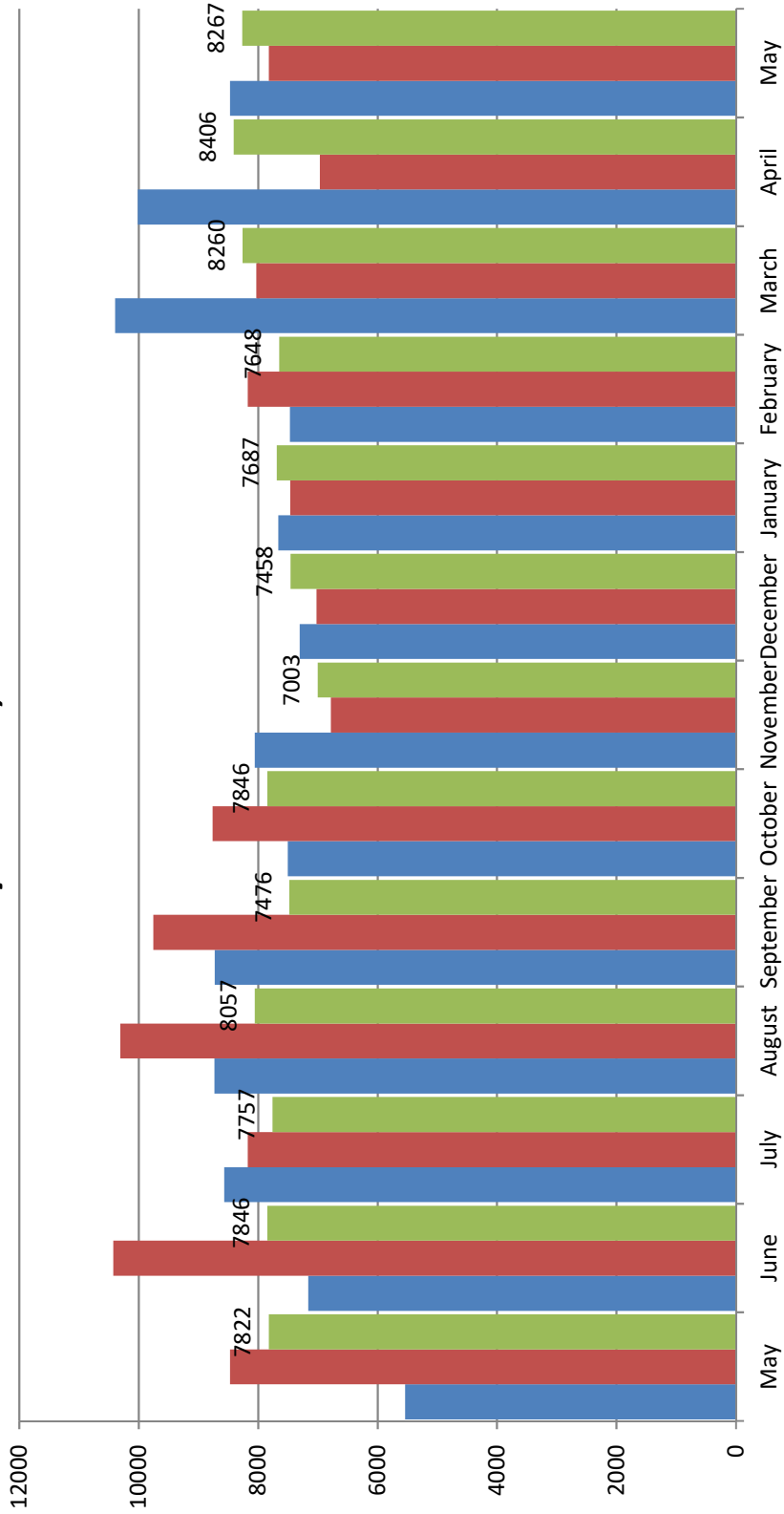
Total for 2023/2024: 110,686



Main Library, Bookmobile and Pickup Window Attendance



Use of Public Computers & Wireless Network 2023/2024: 91,262



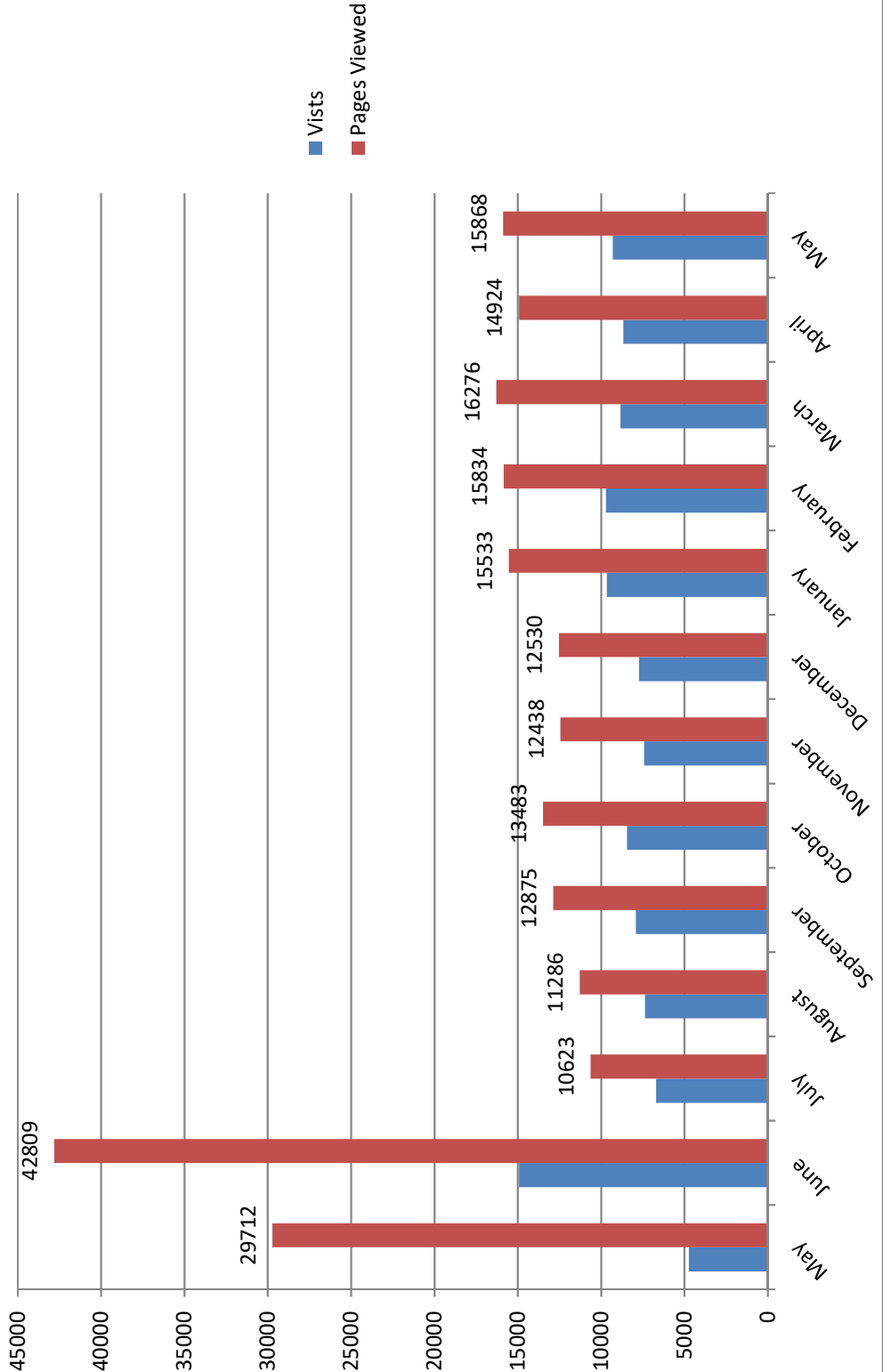
Total for 2021/2022: 100,047 Total for 2022/2023: 99,664

■ 2021/2022
 ■ 2022/2023
 ■ 2023/2024

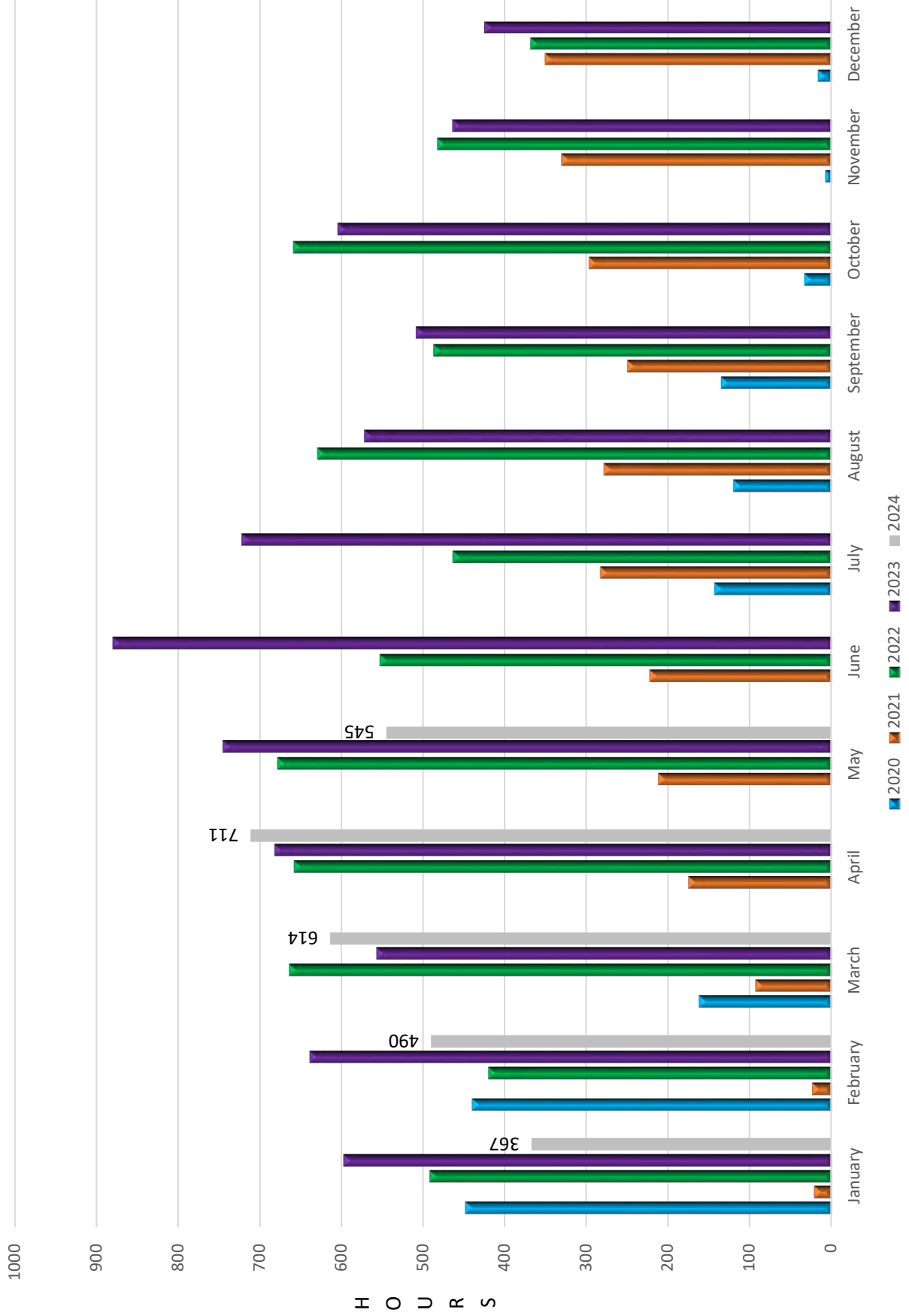
Library Web Page Usage

2023/2024 12 month Total Pages Viewed: 194,497

2023/2024 12 month Total Sessions: 106,645



Volunteer Statistics



GREAT FALLS PUBLIC LIBRARY

**PERSONNEL REPORT
MAY 2024**

NEW HIRES

None

RESIGNATIONS/TERMINATIONS/LAY-OFFS

None

REHIRES

None

TRANSFERS/PROMOTIONS

None



Library Board Meeting Date: June 25, 2024

**GREAT FALLS PUBLIC LIBRARY
BOARD AGENDA REPORT**

Item:	Public Library Standards: Roadmap Review—Access to Library Services
Presented By:	Susie McIntyre, Library Director
Action Requested:	None

Suggested Motion: NONE

Staff Recommendation: Staff recommends that the Library review *Access to Library Services* section of the Library Public Library Standards Road Map. The Library should continue to ensure that they meet ALL of the Essential Standards. The Board should determine which Excellent and Cooperative Standards Great Falls Public Library should pursue.

Background: In order to meet the Montana State Library Public Library standards, the Board is required to review the *Public Library Standards Roadmap* yearly. The Board has elected to review one section of the Road Map each month. The Board is scheduled to review the *Access to Library Services* section at the June meeting.

The Road Map has three types of recommendations.

- Essential – GFPL is required by to meet these standards in order to receive State Aid.
- Excellent – GFPL is not required to meet these standards to receive funding, but should consider making effort to meet standard in order to provide the best service to our community.
- Cooperative— GFPL is not required to meet these standards to receive funding, but should consider making effort to meet standard in order to provide the best service to our community. These standards require collaboration with other libraries or within the Pathfinder Federation.

Significant Impacts: Thoughtful review of the Road Map and implementation of the Standards can help GFPL provide excellent service

Fiscal Impact: The Library Board is required to review the Public Library Standards Road Map annually in order to receive State Aid.

Alternatives: The Board could decide not to review the Road Map which would jeopardize Great Falls Public Library’s State Aid for FY2025.

Attachments/Exhibits:

The *Access to Library Services Section* of the Montana Public Library Standards Road Map

Public Library Standards Road Map: Great Falls Public Library Status

Blue = Library Meets Standard No Additional Action Needed by Board

Green = Library Meets Standard Board Needs to Continue to take regular action

Orange = Library does NOT meet Standard. Standard NOT required. Board decision needed. Does the Board want to make plan to meet standard?

ACCESS TO LIBRARY SERVICES: Everyone has easy access to library services.

Essential	Excellent	Cooperative
<p>The library is open convenient hours. At a minimum the library is open at least the following number of hours weekly: Population More than 25,000 Minimum: 50 Desirable: 60+</p> <ul style="list-style-type: none"> GFPL MEETS STANDARD. Library is open 52 hours per week and that will expand this Spring LIBRARY NEEDS TO CONTINUE TO BE OPEN ADEQUATE HOURS. 	<p>Everyone has safe, comfortable and convenient access to community destinations and public places—whether walking, driving, bicycling, or taking public transportation through the work of the library and other local community organizations.</p> <ul style="list-style-type: none"> GFPL DOES NOT MEET STANDARD. NOT REQUIRED. Board decision needed. Does the Board want to make plan to meet standard? Meeting Standard would require Library to work with community partners. 	<p>Everyone within a region is able to use libraries within that area because the libraries have agreed to provide services to anyone within that area.</p> <ul style="list-style-type: none"> GFPL DOES NOT MEET STANDARD. NOT REQUIRED. Board decision needed. Does the Board want to make plan to meet standard? Meeting Standard would require Board to coordinate with other libraries.
<p>Everyone has safe, comfortable, and convenient access to the library and its services.</p> <ul style="list-style-type: none"> GFPL MEETS STANDARD. Library strives to be safe, welcoming space for everyone. LIBRARY NEEDS TO CONTINUE TO WORK TO MAKE OUR SPACES SAFE AND WELCOMING. 	<p>Everyone is able to use library services because the library has adopted a fine free policy that balances personal responsibility with the recognition that overdue fines can be a barrier.</p> <ul style="list-style-type: none"> GFPL MEETS STANDARD. Library does not charge late fines. LIBRARY NEEDS TO CONTINUE TO BE FINE FREE. 	<p>Everyone has seamless access to library services because libraries participating in sharing groups have agreed to take down the walls and act as one library.</p> <ul style="list-style-type: none"> GFPL DOES NOT MEET STANDARD. NOT REQUIRED. Board decision needed. Does the Board want to make plan to meet standard? Meeting Standard would require Board to coordinate with other libraries.
	<p>Everyone feels welcome because library staff attend training that helps staff identify implicit bias and how to overcome that bias.</p> <ul style="list-style-type: none"> GFPL DOES NOT MEET STANDARD. STANDARD NOT REQUIRED. Board decision needed. Does the Board want to make plan to meet standard? Meeting Standard would require Library staff to take additional training. 	



Library Board Meeting Date: June 25, 2024

**GREAT FALLS PUBLIC LIBRARY
BOARD AGENDA REPORT**

Item:	Policy Review: <i>City of Great Falls Personnel Policy Manual</i>
Presented By:	Susie McIntyre, Library Director
Action Requested:	Approve the <i>City of Great Falls Personnel Policy Manual</i>

Suggested Motion:

1. Trustee moves:
...that the Great Falls Public Library Board of Trustees approve/disapprove the *City of Great Falls Personnel Policy Manual* as presented.
 2. Chair requests a second to the motion, public comment, Board discussion, and calls for the vote.
-

Staff Recommendation: Staff recommends that the Library Board approve the *City of Great Falls Personnel Policy Manual*

Background: The Library Board is required to review every library policy at least every four years in order to receive State Aid. The Board has elected to review different policy sections throughout this calendar year. The Board is scheduled to review the *City of Great Falls Personnel Policy Manual* at the June meeting.

According to the current agreement between the Great Falls Public Library and the City of Great Falls.

2. *The Library Board shall have the exclusive power and authority to determine policy for the operations of the library; prepare budgets; authorize expenditures; determine the selection of materials; and negotiate contracts and agreements as set forth in 22-1-309, MCA*
3. *The City shall have authority and responsibility for all personnel matters, including hiring, firing and disciplinary proceedings, for all library employees, including the Library Director, except that appointment of the Library Director must be made in consultation with and be confirmed by the Library Board.*

In order to follow the agreement that the City have “authority and responsibility for all personnel matters”, all Library staff are required to abide by the *City of Great Falls Personnel Policy Manual*.

Any changes to the *City of Great Falls Personnel Policy Manual* would apply to ALL City staff not just Library staff. The Library Board of Trustees does not have the authority to make changes to the *City of Great Falls Personnel Policy Manual*. The Board is able to provide feedback to the City of Great Falls including the City Manager and the HR Department about any requested changes.

Significant Impacts: Updated policies will promote better Library service. Board support of City Policies provides clear direction to staff.

Fiscal Impact: The Library Board is required to review every library policy at least every four years in order to receive State Aid. Review of the policy is enough to meet this standard. There is no fiscal impact if the Board does or does not vote to approve the policy

Alternatives: The Board could decide not to approve the *City of Great Falls Personnel Policy Manual* or ask for alterations to be made to the proposed policies.

NOTE: As described above, any changes to the *City of Great Falls Personnel Policy Manual* would apply to ALL City staff not just Library staff. The Library Board of Trustees does not have the authority to make changes to the *City of Great Falls Personnel Policy Manual*. The Board is able to provide feedback to the City of Great Falls including the City Manager and the HR Department about any requested changes.

Attachments/Exhibits:

City of Great Falls Personnel Policy Manual



PERSONNEL POLICY MANUAL

*for Employees of the
City of Great Falls
May 2016
(Revised March 1, 2021)*

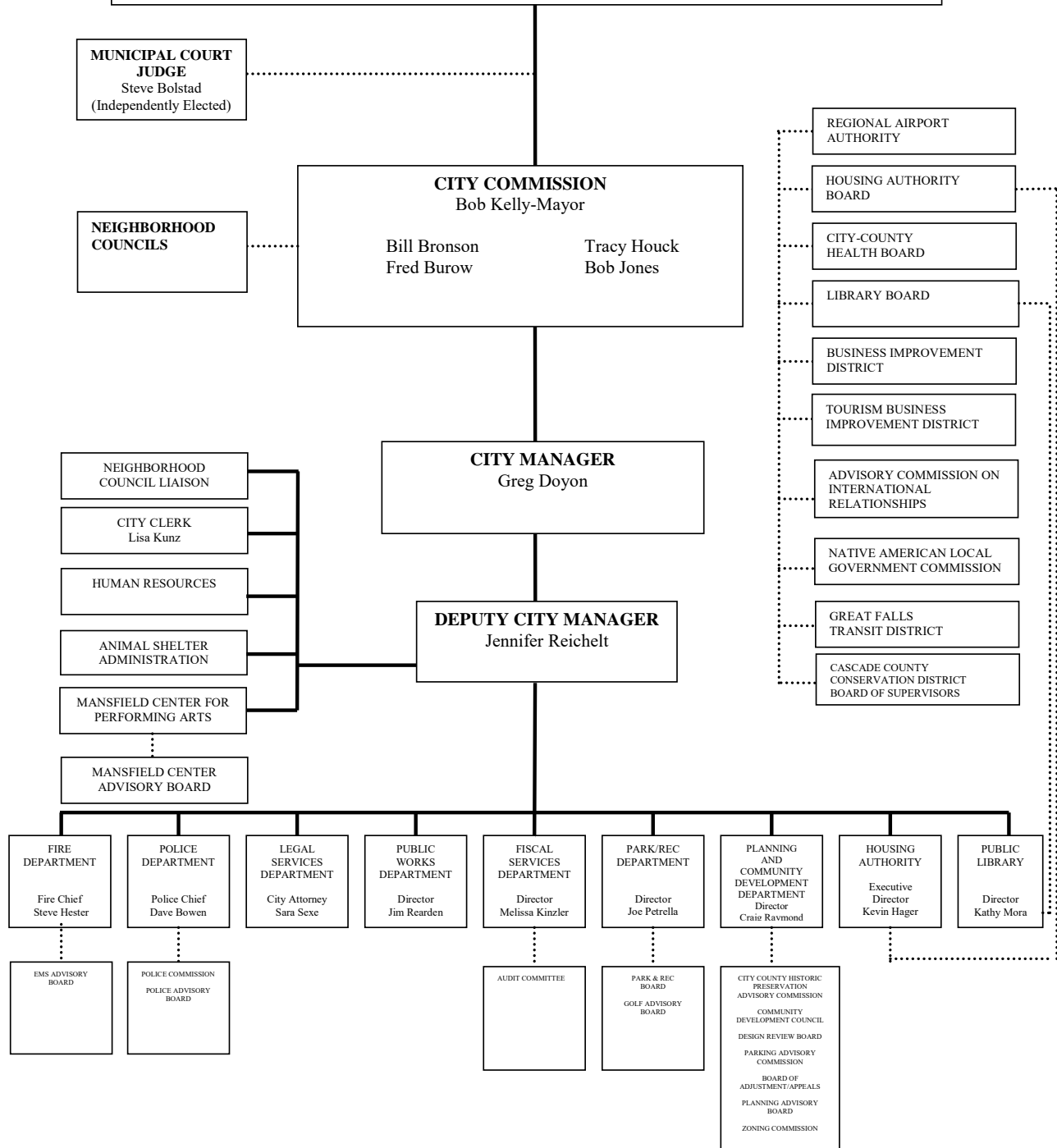
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CITIZENS OF GREAT FALLS



Administration		
City Manager	2 Park Drive S, Room 201	455-8450
Deputy City Manager		455-8417
City Clerk/Commissioners	2 Park Drive S, Room 204	455-8451
Fire Department		
Fire Station 1 & Administration	105 9 th Street So.	727-8070
Fire Station 2	731 6 th Street NW	727-8505
Fire Station 3	3325 Central Avenue	727-8076
Fire Station 4	1900 Fox Farm Road	727-0538
Fiscal Services	2 Park Drive S, Room 104	455-8423
Housing Authority, Great Falls 453-4311	1500 Chowen Springs Loop	
Human Resources	2 Park Drive S, Room 202	455-8545
Information Technology	2 Park Drive S, Room 8	455-8483
Library, Great Falls Public	301 2 nd Avenue N	453-9706
Legal/City Attorney/Civil	2 Park Drive S, Room 204	455-8578
Legal/City Attorney/Prosecutors	2 Park Drive S, Room 102	455-8535
Mansfield Center for the Performing Arts	2 Park Drive S, Room 105	455-8510
Mapping and Addressing	2 Park Drive S, Room 5	455-8437
Municipal Court Office	2 Park Drive S, Room 2	771-1380
Park and Recreation	1700 River Drive N	771-1265
Payroll	2 Park Drive S, Room 104	455-8426
Planning and Community Development	2 Park Drive S, Room 112	455-8438
Police	112 1 st Street S	727-7688
Public Works		
Director	1005 25 th Avenue NE	727-8390
Engineering	1025 25 th Avenue NE	771-1258
Operations	1025 25 th Avenue NE	771-1401
Water/Sewer Utilities	1005 25 th Avenue NE	727-8045
Water Treatment Plant	1301 Lower River Road	727-1325
Risk Management and Safety	2 Park Drive S, Room 202	455-8446
Utility Billing	2 Park Drive S, Room 104	727-7660

Great Falls at a Glance

Form of Government	Commission-Manager
Legislative Body	Five member commission, including a mayor.
Election Schedule	Commission members are elected at large or by district to staggered four-year terms. The Mayor is elected at large every two years. There are no term limits.
Population*	59,152
Area	23.4 square miles
Number of Employees**	481.56 full-time & part-time positions (approximately 250 temporary annually)

* 2014 US Census Population Estimate

**FY 2016 City Budgeted Full-Time Equivalents (FTE's)

About our City

Great Falls is named after the Great Falls of the Missouri River which were discovered by Lewis and Clark in 1805. Founded in 1884 by Paris Gibson, Great Falls became an incorporated city in 1885. The first City Council election was held November 21, 1888. In 1896 Great Falls became a first class city as defined in MCA §7-1-4111 (every city having a population of 10,000 or more is a city of the first class).

The county seat of Cascade County, Great Falls is one of the largest cities in Montana, with a population of approximately 59,152 (2014 US Census population estimate). The City comprises an area of around 23.4 square miles.

Great Falls is the regional trade center for a 12-county area. The top employers in Cascade County in 2014 included Malmstrom Air Force Base, Benefis Health Care, Great Falls Public Schools, Montana Air National Guard, City of Great Falls, Cascade County, Wal-Mart, Easter Seals Goodwill, and Great Falls Clinic. In 2011, there were nearly 2,500 businesses in Great Falls in a variety of economic sectors, including agriculture and forestry, manufacturing, government, transportation and communication, and construction. The largest number of businesses in Great Falls is in the services and retail trade sectors.

The Great Falls School District administers a comprehensive educational program to students in 15 elementary, three middle, and three high schools (including one alternative high school). Great Falls is also home to the Montana School for the Deaf and Blind. There are several post secondary educational opportunities available in Great Falls, including the University of Great Falls, Great Falls College - Montana State University, and satellite campuses for a variety of other nationally accredited universities.

How the City Government Works

The Commission-City Manager form of government was adopted by a majority vote in 1972. This system of local government combines the political leadership of elected City Commissioners with the executive experience of a City Manager.

The Commission is Great Falls' legislative body. It sets policy, approves the budget, and determines the tax rate. Members of the Commission are elected at-large to four year staggered terms on a non-partisan ballot. The Mayor is elected individually, under a charter amendment approved by the voters in 1986. The Mayor is the presiding officer at Commission meetings and is the chief elected official of the City.

The Commission hires the City Manager. The Manager is responsible for carrying out the Commission's policies, for ordinance enforcement, and for the administration of all City business. The Manager directs the work of all departments, ensures enforcement of all laws and ordinances, conducts studies and makes recommendations for Commission direction, and prepares the annual budget for review and adoption by the Commission.

With few exceptions, every employee hired by the City is directly or indirectly responsible to the City Manager. The City Manager is responsible to the City Commission. The City Commission is, in turn, responsible to the citizens of Great Falls.

Welcome to the City of Great Falls!

As your employer, the City's goal is to provide you with a safe working environment and an opportunity to grow in your new position. The success of any organization depends on its employees. We recognize that our employees are the City's greatest asset.

We strive to foster a service-oriented culture focused on responsiveness, efficiency, and exceeding expectations. Public employees are very visible in the community and the manner in which you conduct your duties reflects on the entire organization. I encourage you to keep this in mind as you go about your daily duties.

The Personnel Policy Manual outlines City policies and benefits. As a condition of your employment, it is your responsibility to review the Manual, know it, and follow its guidance. Updates occur to the Manual from time to time. When the updates occur, the employee is responsible for keeping the Manual current.

The Human Resource Department can assist you with answering any questions you may have about the Manual. When in doubt, ask. If you work in an employment group covered by a Collective Bargaining Agreement, you may need reference the Agreement for specific policies and benefits applicable to your group.

Once again, I extend my personal congratulations and best wishes in your employment with the City of Great Falls. I look forward to working with you in making a Great Falls a Great community to work and live.

Sincerely,



Gregory T. Doyon
City Manager

Any organization can be viewed as a system with three distinct subsystems: *WHY*, *WHAT*, and *HOW*. The *WHY* describes *WHY* the organization exists and where it is going, which includes the mission, vision, and values of the organization. The *WHAT* describes *WHAT* the organization does to achieve its mission and vision, which includes the goals of the organization. The *HOW* describes *HOW* individuals, teams, and departments interact, which includes the attitudes, habits, and behaviors of each employee.

The City of Great Falls, as an organization, has developed a Leadership Philosophy, Mission, Vision, and Goals. Each employee plays a role in carrying out the goals of the organization and ultimately achieving the mission and vision. By understanding the overall mission and vision of the City, we can all appreciate the contribution that we and others make to our organization.

1.1 Leadership Philosophy

We hold the common good of an enriched community as our highest goal. We lead by serving those around us, by maintaining honesty and integrity, and by fostering mutual trust, respect, and support. We reach our potential in a climate that encourages individual and community growth by listening, valuing our differences, and by engaging in the free flowing exchange of ideas.

1.2 Vision Statement

Our vision is that of a responsive local government strategically prepared for change and challenge. We will build partnerships throughout the community. We will be recognized for our efficient, effective, and caring delivery of service products. Nurtured and inspired by this vision, we will create a passion for excellence. Our core values of honesty, respect, and openness will constantly guide our actions.

1.3 Mission Statement

As a responsive and innovative local government, we strive to enrich our community by fostering partnerships and collaboration, by delivering superior service and products, and by acting as a catalyst for a dynamic future. We do this by valuing honesty and integrity, by empowering our employees to be the best they can be, and by listening to diverse opinions and ideas.

2.1 The Employment Relationship

All employees, regardless of role, position, or salary, have a critical contribution to make in achieving the City's mission. The City is committed to providing a work environment free from discrimination, harassment, alcohol and drugs; a workplace where employees can creatively address their responsibilities and function in supportive relationships with managers; and a place where employees can interact responsibly with colleagues and customers. This requires mutual respect and honest communication.

2.2 Purpose of the Personnel Policy Manual

This Manual is designed to provide guidance to the workforce and effective human resources management. These policies are designed to provide flexibility for independent judgment by employees and managers while ensuring accountability to the public. Employees should be empowered to make the decisions necessary to provide fast, flexible service to residents and businesses they serve within ethical and managerial guidelines.

2.3 Applicability of the Personnel Policy Manual

This Manual applies to all employees of the City of Great Falls unless otherwise provided herein. Employees will sign the Receipt and Acknowledgement form (Appendix D) verifying they have received and are familiar with this Manual. Human Resources (HR) will place this form in each employee's Personnel File. This Manual replaces all previous personnel policy material issued by HR for the City.

2.4 Format and Maintenance of the Personnel Policy Manual

The City Manager has final authority for administration of this Manual. HR is responsible for the daily administration, development of policy recommendations, instructions for implementation, and is the source of expertise in the application and intent of these personnel policies. If policy discrepancies arise, the City Manager and/or HR will determine the application and intent of these policies.

2.4.1 Maintenance of the Personnel Policy Manual

This Manual is issued and maintained by HR.

2.4.2 Changes to the Personnel Policy Manual

The policies, procedures, and benefits herein may be altered at any time by the City Manager or because of action taken by the City Commission, Congress, Montana Legislature, or courts. When a policy, procedure, or benefit is altered, employees will be notified in writing or by electronic means through supplements to this Manual. Employees are expected to insert or remove the appropriate items to keep their Manual up-to-date. This Manual will also be updated on the City intranet.

2.4.3 Conflict with Collective Bargaining Agreements

If any of the provisions of these policies conflict with a negotiated Collective Bargaining Agreement (CBA), the CBA will take precedence to the extent applicable.

2.5 Bulletin Boards

Throughout the City's offices are bulletin boards where required notices of employment laws are posted. Information of general interest is posted regularly on bulletin boards, including in-house position announcements. Any employee who would like to post notices on the City bulletin boards should ask their supervisor for approval.

All personnel records and personnel administration functions at the City have been assigned to Human Resources (HR). Questions about employment, including insurance, wages, benefits, and interpretation of policies should be directed to HR or your supervisor.

3.1 Employee Orientation

New and re-hired employees are required to complete paperwork including payroll and benefit forms in the HR Office on their first day of work. Employees will be provided copies of the Personnel Policy Manual and other employment materials.

The City normally conducts employee orientation sessions near the onset of employment. These sessions are intended to introduce employees to the organization, provide an opportunity to exchange information, develop working relationships, promote teamwork, improve work performance, and answer policy and benefit questions. Attendance should be coordinated by the employee’s supervisor.

3.2 Personnel File

Except in limited circumstances, personnel records are confidential and are used solely for business purposes and are kept in Human Resources. Medical information and records are confidential and securely stored in a file separate from the employee’s personnel file. You must notify HR and your supervisor if your address or phone number change or of changes in marital and/or dependent status, which may require changes to tax and insurance records. Coverage and/or benefits that employees and their families may receive could be negatively affected if the information in their file is not accurate. Employees may change their information on-line at <https://public.greatfallsmt.net/websites.hr.portal/Default.aspx>.

3.2.1 Updates to Personnel File

It is in employee’s best interest, and their responsibility, to ensure their personnel files include information about completion of licenses, certification, educational or training courses, outside civic activities, and areas of interest and skills.

3.2.2 Access to Personnel File

Through HR employees can request access to their personnel file at any time. However, personnel files may not be taken out of HR.

3.3 Equal Employment Opportunity

The City of Great Falls provides an equal employment opportunity (EEO) to all persons regardless of race, color, religion, sex, political belief, national origin, age, physical or mental ability, marital status or other characteristic protected by law. The City will provide opportunities to disabled employees on the same terms and conditions as the employees without disabilities, unless it is shown that accommodation is not reasonable, or that the particular disability prevents the performance of the work involved.

The City is committed to complying with all applicable provisions of the Americans with Disabilities Act (“ADA”), the ADA Amendments Act and equivalent state disability laws. It is the City’s policy not to discriminate against any qualified employee or applicant with regard to any terms or conditions of employment because of such individual’s disability or perceived disability so long as the employee can perform the essential functions of the job

with or without a reasonable accommodation. Consistent with this policy of nondiscrimination, the City will provide reasonable accommodations to a qualified individual with a disability, provided that such accommodation does not constitute an undue hardship on the City and/or a direct threat to the health and/or safety of the individual or others.

Employees or applicants who believe they need a reasonable accommodation to perform the essential functions of their job should contact the HR Department to request such an accommodation. The City will conduct an investigation to identify the barriers that make it difficult for the applicant or employee to have an equal opportunity to perform his or her job. The City will then identify possible accommodations, if any, that will help to eliminate the limitation or barrier. If the accommodation is reasonable and will not impose an undue hardship on the City and/or a direct threat to the health and/or safety of the individual or others, the City will make the accommodation.

The City may also propose an alternative accommodation(s). The City is not required to provide the accommodation preferred by the individual, to reallocate essential job functions, or to provide personal use items (i.e., eyeglasses, hearing aids, wheelchairs, etc.)

The City will also make reasonable accommodations for conditions related to pregnancy, childbirth or related medical conditions, if requested with the advice of the employee's health care provider, as required by law.

3.3.1 Application of EEO Policy

The EEO policy applies to recruitment, hiring, training and development, transfer, promotion, termination, layoff, compensation benefits, social and recreational programs, and all other conditions and privileges of employment in accordance with applicable federal, state, and local laws.

3.3.2 Posting of EEO Notices

EEO notices are posted on employee bulletin boards and can also be found posted in the HR Office. EEO notices summarize the rights of employees to equal employment opportunity and indicates which government agencies may be contacted to report possible violations of EEO policy. To report a violation, contact any of the following: City of Great Falls HR department at 455-8448; the Human Rights Bureau, Department of Labor and Industry, 1625 11th Ave., PO Box 1728 Helena, MT 59624-1728, (800) 542-0807; or the United States Equal Employment Opportunity Commission, 909 First Avenue Suite 400, Seattle, WA 98104-1061, (800) 669-4000.

3.3.3 Implementation of EEO Policy

HR is primarily responsible for seeing that the City's EEO policies are implemented. However, all employees share responsibility for ensuring that the policies are effective and applied uniformly by their personal actions.

3.3.4 Disciplinary Action

Any City employee found to be involved in unlawful discriminatory practices will be subject to disciplinary action, up to and including termination.

3.4 Recruitment Guidelines

The City Manager is ultimately responsible for all City hires, however daily involvement in this is impractical and as such, the City Manager delegates hiring authority to departments. Department Heads may delegate hiring to lower level supervisions. All recruitment and hiring must be coordinated with Human Resources (HR), using its hiring practices and may be subject to different policies under applicable CBA's. HR is responsible for providing expertise, assistance, and support to each department.

3.4.1 Vacation of Position

Upon any action that leaves a position vacant, the employing department submits a final Personnel Action Form (PAF) to HR on behalf of the employee. The PAF states the reason the employee vacated the position and the effective date.

3.4.2 Creation of Job Description

The supervisor of the vacated position shall review the existing job description to determine if the responsibilities and requirements are accurate. The supervisor should work with HR if a revision, update, or new description is needed.

3.4.3 Position Announcement

If the City Manager approves and the budget is available, the employing department may submit a Personnel Requisition Form to HR in order to initiate filling a position. The requisition will then be forwarded to the City Manager's Office for authorization. If authorized, recruitment will begin. HR will draft a position announcement and the department head or supervisor will review the announcement before it is distributed to ensure accuracy.

3.4.4 Placement of Position Announcement

The Department Head or designee will instruct HR as to where to advertise the position. Advertising options include in-house, locally, regionally, or nationally.

3.4.5 In-house Posting of Positions

If the position is for a licensed professional, it may not be posted in-house before being posted to the general public. Posting other positions in-house gives current City employees the first opportunity to apply. This practice does not infer preference. After a position has been posted in-house for three working days, the position may be posted for the general public to apply at the department head's discretion. For the purpose of recruitment, an in-house applicant is defined as an active City employee in a pay status or on FMLA or Workers' Compensation leave on the day the position announcement is distributed (in-house applicants do not include individuals in an unpaid leave of absence status).

3.4.6 Screening Applications

Once the posting period closes, HR will record all of the applications and make them available for the supervisor and/or designated personnel to review and screen in order to assess qualifications. The screening process determines which applicants will be interviewed.

3.4.7 Scheduling Interviews

HR or the hiring department will schedule interviews with the selected applicants and coordinate any testing that may be required to review and assess qualifications for the position.

3.4.8 *Interview Panel*

The supervisor and/or Department Head has the discretion to convene an interview panel prior to conducting interviews, which may consist of any combination of the following as determined by the supervisor and/or Department Head:

- Immediate supervisor;
- Another representative from the employing department;
- A representative from another (not the employing) department;
- A Human Resources representative; and/or
- A member of the public with expertise, knowledge, or interest in the responsibilities of the position.

If the supervisor and/or Department Head determines that HR will not be involved in the interview process, it is strongly recommended that training in the City's techniques be obtained. HR will assist all supervisors in this training process as necessary.

3.4.9 *Selection of Applicant for Position*

After the interview panel has completed interviews and the department has selected an applicant they wish to hire, a reference/background check is conducted. The employing department submits a PAF on behalf of the successful applicant prior to notifying the applicant of the job offer. HR contacts unsuccessful applicants, unless the employing department wishes to do so itself. **New hires must complete necessary paperwork provided by HR prior to performing work duties.**

3.5 **Job Descriptions**

HR maintains job descriptions for the City. Departments should conduct periodic reviews of job descriptions to ensure any changes in the duties and responsibilities of each position are accurately reflected, particularly when there is a vacancy in the position. Changes in the duties and responsibilities of a position should be updated in the job description. Job descriptions are available from supervisors or HR.

3.6 **Management Rights**

Except as otherwise provided by law, contract, or elsewhere in this Manual, management reserves the right to operate and manage the City of Great Falls. These rights include, but are not limited to, the right to:

3.6.1 Direct employees.

3.6.2 Determine the methods, means, job classifications, and personnel by which operations are conducted and subsequently hire, promote, transfer, assign and retain employees.

3.6.3 Relieve employees from duties because of lack of work or funds or under conditions where continuation of such work would be inefficient and/or non-productive.

3.6.4 Maintain the efficiency of operations.

3.6.5 Establish minimum performance standards, methods, and processes by which work is performed.

3.7 Department Head Responsibilities

Department Heads and other management officials may perform the following personnel management functions:

- 3.7.1 Screen and select applicants for employment.
- 3.7.2 Assign duties and responsibilities to employees.
- 3.7.3 Make personnel-related decisions for their department.
- 3.7.4 Make salary recommendations.
- 3.7.5 Establish work expectations, resolve conduct and performance issues, maintain discipline, and develop operating procedures.
- 3.7.6 Schedule daily procedures within the department, including hours of work, rest and lunch periods, and clean-up time. Ensure that changes in established work schedules are reasonable and made as necessary to maintain efficient operations.
- 3.7.7 Identify training and development needs and provide for on-the-job training when necessary and appropriate.
- 3.7.8 Develop organizational structures and recommend staffing levels based on departmental goals and budget requirements.
- 3.7.9 Communicate work and performance expectations to employees in the department and ensure these expectations are conducive to the department's mission.
- 3.7.10 Issue departmental rules, regulations, and operating procedures necessary for the efficient functioning of the department; however, such rules and regulations shall not be in conflict with any portion of this Manual.
- 3.7.11 Delegate wholly or in part management functions to supervisors within their department.

3.8 Supervisor Responsibilities

Immediate supervisors provide day-to-day guidance and counsel regarding work assignments and progress made, including:

- 3.8.1 Assigning work, recommending pay increases, conducting written performance reviews, and maintaining order and discipline in the workplace. Employees are responsible for seeking clarification of regulations or responsibilities as necessary.
- 3.8.2 Showing employees where the department's employee bulletin board is located, which posts the required employment law notices.
- 3.8.3 Providing or directing education/training specific to the operation of the equipment and tasks the employee is required to perform.
- 3.8.4 Providing or arranging for work orientation and education including risk management, information technology and safety training.

4.1 Ethics Policy

The City strives to provide officials and employees with information concerning possible conflicts of interest that may arise in the performance of their duties. The City's ethical standards are designed to encourage employees and officials (elected or appointed) to be dedicated to the concepts of effective and democratic local government in order to honor integrity in all public and personal relationships. This, in turn, earns respect and confidence and also affirms the dignity and worth of government services. These standards help maintain a positive attitude toward urban affairs and a deep sense of social responsibility as a public servant. The City aims to instill in all employees and officials that local government exists to serve the best interests of the people.

4.2 Ethical Standards

The following is a synopsis of the City's ethical standards, adopted by the City Commission on January 19, 1993 by Ordinance 2643 and applicable Montana law. Employees and officials of the City of Great Falls shall comply with these provisions.

4.2.1 Appointed or elected officials, employees, or their immediate family members or any organization in which they have an interest cannot:

- a. Have interest in an organization or engage in any activity OR act in an official capacity in a matter that might impair their objectivity, independence, or judgment OR undertake any private employment or service that might prejudice independent judgment or conflict with their City duties.
- b. Use or attempt to use their City position to secure privileges or advantages.
- c. Solicit or accept any gift, favor, contribution, service, promise of employment, or other thing of value for the purpose of influencing, directly or indirectly, the discharge of their City duties.
- d. Use or allow the use of a public office or information not generally available to the members of the public, which they receive or acquire in the course of their duties, for securing financial gain.
- e. Represent another person or party in connection with a cause, proceeding, application, or other matter pending before the City.
- f. Request, use, or allow the use of any public property, vehicle, equipment, labor, or service for their own or any other person's personal convenience or advantage.
- g. Approve, disapprove, or recommend the payment of a bill, voucher, or indebtedness in which they have direct or indirect interest.

4.2.2 Employees and officials elected or appointed in the City shall:

- a. Receive formal written authorization from the appropriate person or body prior to disclosing any confidential information concerning any other employee or official, or any other person, or any property or governmental affairs of the City.

- b. Exercise prudence and integrity in management of public funds in their custody and in all financial transactions.
- c. Uphold the letter and spirit of the constitution, statutes, and regulations governing their duties, and report violations of the law to appropriate authorities.
- d. Be responsive to the concerns and questions of the public.
- e. Prevent distribution or dissemination of information not generally available to the public, such as confidential or private information provided to the City by members of the public.

4.3 Nepotism

All personnel matters shall be administered on the basis of merit and through regular management procedure except:

4.3.1 No one participating actively in the appointment of a position (i.e., City Commissioners, City Manager, representatives of Human Resources, the appointing Department Head) shall appoint any person they are related to or connected by consanguinity within the fourth degree or by affinity within the second degree.

4.3.2 No one may be appointed to a position within a City department if related or connected by consanguinity within the fourth degree or by affinity within the second degree to any person sitting on a board or commission representing or advising that department. The above shall include but not be limited to: City Commission, Board of Adjustment, Board of Health, Housing Authority, Library Board, Park and Recreation Board, Parking Commission, Planning Board, and Police Commission.

Note: "Consanguinity" means blood relation. Degrees are determined as follows:

- A parent and child are first degree
- A grandparent, grandchild, brother and sister are second degree
- An uncle, aunt, nephew, niece, and great grandparent are third degree
- A first cousin, great uncle/aunt, and great-great grandparent are fourth degree

"Affinity" means a relationship by marriage. Degrees are determined as follows:

- Husband and wife are first degree;
- Brothers-, sisters-, fathers- and mothers-in-law are second degree.

4.3.3 Employment of relatives in the same area of an organization may cause conflict and problems affecting employee morale or could result in perceived favoritism and claims of partiality. The City may refuse to assign or reassign related employees when conflicts have occurred or are likely, or may create difficulties in the work environment.

4.4 Conflict of Interest

City employees are subject to the provisions of Title 2, Chapter 2, MCA. This portion of the Montana law essentially restricts public employees from utilizing information, accepting gifts or benefits, or participating in business undertakings or employment which would affect their economic interests, or influence the faithful and impartial discharge of their public duties, unless their participation is necessary to obtain a quorum or otherwise enable the body to act, and if they comply with the voluntary disclosure procedures. The voluntary disclosure procedures state that public officers or employees may, prior to acting in a manner which may impinge on their fiduciary duty, disclose the nature of their private interest which creates a conflict.

4.5 Confidential Information

City employees may hear, discuss, and become knowledgeable of, or involved with, important, confidential, personal and/or sensitive information relating to employees, customers or others that is not appropriate to discuss with or disclose to other employees, family, or others. City employees are expected to identify and appropriately administer confidential information under applicable law. All employees must maintain this confidentiality even after terminating their position.

Violations of confidentiality seriously injure the City's reputation and effectiveness and may subject the City to liability for inappropriate disclosure of information. Employees who are concerned about the appropriateness of releasing information must request guidance from their supervisor, or the party requesting the information may be directed to the supervisor or the City Manager's Office.

4.5.1 Removal of Confidential Information

No one is permitted to remove any City records, reports or documents without prior approval from management.

4.5.2 Disciplinary Action

Because of the serious nature associated with confidential information, disclosure of such information could lead to disciplinary action, up to and including dismissal.

4.6 Political Activity

City employees are bound by MCA §13-35-226 preventing them from soliciting any money, influence or service, or in any other way engaging in political activity or campaigning regarding a public office while acting as a representative of the City of Great Falls or at their place of employment. City employees cannot simultaneously hold a position with the City *and* an elected or appointed City Commission or Board position as the two functions are incompatible and pose an irreconcilable conflict. Employees are free to express their personal political views, with the understanding that they not interfere with the conducting of business. As a public employee, recognize that your personal actions may adversely affect your ability to perform your job duties.

Certain city employees also are bound by the terms of the federal Hatch Act and must not use their official authority to influence or interfere with the outcomes of elections or nominations or to directly or indirectly coerce contributions from subordinate employees to support a political party or candidate. If you have questions regarding this Act and its application, contact HR.

4.7 Public Statements

Unless appearing in an official capacity as an officer or employee of the City, employees must not make any reference to their employment or position with the City when making public statements or expressing public opinions, while on duty or in uniform.

5.1 Employee Classification

When hired, each employee is classified as full-time or part-time, as regular or temporary (or short-term), and as exempt or non-exempt. HR maintains each employee's job classification.

5.1.1 Exempt Employee

Exempt employees include certain supervisors, executives, professional staff, administrative staff, and others whose duties and responsibilities allow them to be exempt from overtime pay provisions as provided by the Federal Fair Labor Standards Act (FLSA) and applicable state laws.

5.1.2 Non-Exempt Employee

By law, employees classified as non-exempt are entitled to overtime pay for hours worked in excess of 40 hours per week. Non-exempt employees are not exempt from, and therefore should receive, overtime pay.

5.1.3 Full-time Employee

Employees regularly scheduled to work 40 hours per week are considered full-time.

5.1.4 Part-time Employee

Employees regularly scheduled to work less than 40 hours per week are considered part-time. Part-time employees are scheduled as needed. Regular part-time employees earn some benefits on a prorated basis. Refer to each benefit policy for information on eligibility of part-time employees.

5.1.5 Regular Employee

A regular employee is someone whose term of employment is not expected to expire on a specific date. Regular employees may work either a full- or part-time schedule.

5.1.6 Temporary Employee

Employees hired for specific periods of time in excess of ninety non-consecutive days, but not exceeding twelve months are considered temporary employees. Temporary employees may qualify for some benefits, such as accrual of sick leave.

5.1.7 Short-term Employee

Employees hired on an on-call basis or for periods of time not to exceed ninety non-consecutive days are considered short-term employees. Short-term employees do not qualify for any benefits.

5.2 Probationary Period

Unless specifically provided for in writing, employees must complete a probationary period of at least six months after their start date. This period allows new employees an opportunity to determine if they are satisfied with the conditions and nature of their work. Similarly, the City uses this period to determine if a new employee is well suited to a position. If a new employee's work performance or conduct does not meet the City's expectations during this period, the employee may be terminated. Completion of the probationary period does not guarantee continued employment. If a probationary employee is approved for leave during the probation period, the

probationary period will be suspended during the time off and will resume upon return from leave.

5.2.1 Extension of Probationary Period

On rare occasions and with City Manager's approval, the length of a probationary period may be extended by the City of Great Falls for performance, training, disciplinary or other reasons. Employees will receive written notice of an extension in their probationary period prior to the end of the original probationary period. The extension notice will contain reason(s) for the extension. If, for example, an employee takes approved unpaid leave during the probationary period, the probationary period may be extended by that length of time.

Unless the employee receives written notification that he/she has not satisfactorily completed the established probationary period on or before the end of the probationary period, the employee's classification will change from probationary to regular.

When an employee is employed by a new City department in a separate position, that employee is subject to a new six (6) month probation period for that new position.

5.2.2 Probationary Period Performance Evaluation

During the probationary period, a supervisor will evaluate the employee's job performance. Employees will receive input about their job performance and are encouraged to share their comments and ideas.

5.3 Driver's License and Driving Record Requirements

Employees whose work requires operation of a motor vehicle must present and maintain a valid driver's license and a driving record acceptable to the City's insurer or indemnity carrier and must follow the safety manual guidelines. Employees must report any changes in driving record or status to their supervisor immediately. Failure to do so may result in disciplinary action, and possible dismissal. Employees whose job requires a Commercial Driver's License (CDL) are subject to and need to meet any additional Federal- and state-established license requirements.

5.4 Scheduling of Work

Employees' work schedules depend on their positions. Generally, operating hours for City offices are 8:00 a.m. to 5:00 p.m., Monday through Friday, unless changed by the City Manager's Office. Department Heads and supervisors have discretion in assigning employees days and hours of work and scheduling lunch periods and breaks based on the needs of the department. Employees are expected to be at their workstation and ready to work at the time designated by their supervisor and are expected to remain at their workstation until the end of their assigned work hours, except for breaks and lunch, as determined by their supervisor. Hourly, non-exempt employees are not permitted to begin work more than 10 minutes before their scheduled starting time nor end work more than 10 minutes after their scheduled work time without their supervisor's approval. Employees who are exempt from overtime regulations are expected to work the hours necessary to satisfactorily fulfill their job duties, including work outside the general operating hours of the City offices.

5.4.1 *Leave*

The City provides leave for times when emergencies, illnesses, or pressing personal business cannot be scheduled outside work hours. Employees are expected to inform their supervisor when they are unexpectedly unable to report to work. Planned absences require prior approval. For detailed information, see §11.2 and §11.3 herein. Unapproved absences from work may be considered voluntary resignation. Excessive absence from work, for any reason, can lead to disciplinary action up to and including termination.

5.4.2 *Tardiness*

Employees are expected to immediately inform their supervisor, prior to arriving to work, if they will be arriving late. This information should be given directly to a supervisor. An employee who is unable to relay this information to a supervisor himself or herself should have someone call on his or her behalf.

5.5 **Break Policy**

As representatives of the City of Great Falls, in any public area, facility, and/or business, employees are expected to conduct themselves in a courteous manner while on break, including acceptable language and actions. All employees, regardless of their position, should use common sense. City employees work for and are paid by the public and their actions are visible and accountable to the public.

5.5.1 *General Break Entitlement*

Employees are entitled to two 15-minute breaks when working an eight-hour shift. One break is taken during the first half of the shift and one during the second half of the shift. Breaks may not be taken during the first or last hour of the shift without supervisors approval. The timing of the break is intended to begin once an employee leaves the work station or location and is not performing work duties.

5.5.2 *Where to Take a Break*

Breaks times should be staggered whenever possible. Supervisors have the discretion to allow occasional exceptions to these break guidelines to meet special employee needs, but these exceptions cannot become routine or normal.

- a. Office personnel, and those working in one location such as the central garage or water plant, should take breaks in the designated break room provided. Breaks should be coordinated with a supervisor to ensure adequate office coverage at all times. If a break room is provided and an employee needs to leave the area, the employee should request approval from a supervisor prior to leaving the building.
- b. Field personnel, and those who are out in the community such as Public Works and Park and Recreation staff, should take breaks within the immediate area where they are working. The break should be taken at the closest location where a clean-up facility is available. Employees should not drive any further distance than necessary and should not drive across town to take a break.
- c. No more than two City vehicles should be at any break location (other than on City-owned property) at any time. Exceptions will be made if more than one crew is working in an area at the same time and there is only one location nearby with clean-up facilities. City vehicles cannot be used to travel to a break area away from where the employee is working when a break area is provided.

Unless approved by the Department Head, the use of a City vehicle by employees to visit a residence for a break is not allowed.

5.6 Smoking Policy

The Montana Clean Indoor Air Act of 1979, MCA §50-40-101 *et seq.* prohibits, among other things, tobacco smoking in enclosed public places and places of employment. The City prohibits the use of electronic cigarettes and vapor products (as defined under MCA §16-11-302) in public places as well. References to “smoke” or “smoking” in this policy means the use of tobacco, vapor or any other smokable products. These policies protect public health and welfare, recognize the right of nonsmokers to breathe smoke free air, and recognize that the need to breathe smoke free air shall have priority over the desire to smoke. Please refer to state law for specific language.

5.6.1 Prohibition of Smoking in Public Places

Smoking is prohibited in all enclosed public places within the City including but not limited to all office buildings and offices; places of work; trains, buses and other public transportation; auditoriums, arenas and assembly facilities; meeting rooms open to the public; and other areas identified under Montana law.

5.6.2 Regulation of Smoking in Places of Employment

- a. The City provides a smoke free workplace for all employees.
- b. Smoking is prohibited in all enclosed areas within City buildings, including common work areas, conference and meeting rooms, hallways, lounges, stairs, restrooms, and work and office spaces.
- c. The City prohibits smoking in City-owned vehicles.

5.6.3 Reasonable Distance

When smoking outside an area where smoking is prohibited, employees must ensure that tobacco smoke does not enter the enclosed area through entrances, windows, a ventilation system or other means.

5.6.4 Violations and Penalties

- a. It is unlawful for City employees to violate the provisions of section 5.6.
- b. It is unlawful for any person to smoke in any area where smoking is prohibited.

Any person who violates this policy during a scheduled shift may be subject to discipline up to and including termination.

5.6.5 Non-Retaliation

The City will not discharge, refuse to hire, or in any manner retaliate against any employee, applicant for employment, or customer because such employee, applicant, or customer exercises any right to a smoke free environment afforded under applicable law.

5.7 Meal Period

Generally, employees scheduled to work in excess of four hours daily will be given an unpaid meal period. Department Heads and supervisors have the discretion to schedule meal periods depending on the needs of each department. Generally, supervisors will assign a meal period schedule to each employee.

Employees are expected to take the full time allotted for a meal and not perform any work during this time, unless specifically requested to do so by a supervisor. In this event, the meal period may be rescheduled or the employee will be compensated for the time worked.

5.8 Employee Parking

Employees who drive to work are required to use parking areas designated for City employees. The location of these parking areas is maintained by Planning and Community Development. Employees who qualify to park in handicapped parking spots may park in available spaces, provided they display the appropriate permits and decals. The parking spaces adjacent to or in front of City buildings are for visitors only.

5.8.1 Alternate Transportation

The City suggests that employees consider methods of transportation to get to work other than driving personal vehicles (i.e., bus, bicycle, walking, and carpooling) to reduce parking demands at City buildings and facilities.

5.8.2 Vehicle Accidents

Courtesy and common sense in parking will avoid accidents, personal injuries, and damage to vehicles. The City does not assume liability for loss or damages to any employee or vehicle while in a City parking lot.

a. City Vehicles

Employees causing damage while driving a City-owned vehicle must report the incident and pertinent information to a supervisor and the Risk Manager.

b. Private Vehicles

Employees causing damage in a City parking lot while driving a privately owned vehicle must provide their contact information to the other vehicle.

5.9 Performance Reviews

5.9.1 Purpose of Performance Reviews

The primary purpose of performance reviews is to identify and reinforce positive attributes and identify weaknesses that require improvement. Performance reviews make employees aware of and document how their job performance compares to the objectives and expectations outlined in their job description and how their performance supports their department's mission. The performance review is also an opportunity to discuss interests and future goals.

5.9.2 Frequency of Performance Reviews

The City strives to conduct periodic formal reviews of each employee, with the goal of having annual reviews. New employees or those on probationary status may be

reviewed more frequently. A review may also be conducted in the event of a promotion, disciplinary action, or change in duties and responsibilities.

5.10 Layoff of Employees

In the event of a reduction in the workforce, unless otherwise covered under a Collective Bargaining Agreement, the City Manager or designated representative will authorize the layoff of employees within job categories based on factors such as past performance, qualifications, seniority, and where applicable, veterans status. Written notice will be provided to the affected employees, and their collective bargaining agent, if applicable, at least sixty (60) days prior to a reduction in force when twenty-five (25) or more employees are affected, or fourteen (14) days when less than twenty-five (25) employees are affected. Employees covered by a Collective Bargaining Agreement should reference the appropriate section of their agreement dealing with layoffs. Affected employees may continue health or indemnity insurance coverage under the City's COBRA plan for up to 18 months through self-payment of premiums. Accrued vacation, sick and compensatory leave balances are cashed out in accordance with applicable laws and policies on the effective layoff date.

5.10.1 Veterans Preference

In accordance with MCA §39-29-111, *et seq.* and other applicable law, when layoffs occur, a veteran, disabled veteran, or eligible relative whose performance has not been rated unacceptable under our performance appraisal system shall be retained over other employees with similar duties, qualifications, and length of service for any position that is not covered by a Collective Bargaining Agreement.

5.11 Recall of Employees

If it becomes appropriate to recall employees from layoff status, recall will occur in reverse order from the original layoff. Recall of employees covered by a Collective Bargaining Agreement will follow the appropriate section of the applicable agreement.

5.11.1 Notification of Recall

Unless otherwise covered under a Collective Bargaining Agreement, employees will be notified of the recall by mail to their last known address or by telephone at the number in their personnel file. Failure to respond to the recall within five calendar days of mailing date of the notice will be considered a voluntary resignation. Employees are responsible for informing the City of any change in mailing address or telephone number during a lay-off period. An employee who is laid off and is interested in returning to work in the event of a recall, but leaves the area or will be unreachable for a period of time, should contact Human Resources with contact information.

5.12 Exit Interviews

Employees voluntarily resigning their position may be asked for an exit interview. The exit interview is an opportunity to express opinions freely, offer insights for possible improvements, or express concerns with management. The information provided will in no way affect any future reference information the City provides on any employee's behalf, but will be reviewed and evaluated by appropriate management personnel.

5.13 Loss or Damage of Personal Property

The City is not responsible for any loss, damage, or theft of any personal items. Employees are responsible for all of their personal items.

6.1 Harassment

The City of Great Falls prohibits sexual, ethnic, racial or religious harassment and other unlawful harassment of employees, applicants for employment, or members of public. The workplace and all City functions should be free from intimidation, harassment, and other inappropriate behaviors. The City is committed to providing a work environment free from sexual discrimination and sexual harassment. The City does not condone or permit sexual harassment by or of employees. This includes sexual harassment by or toward co-workers, business contacts, or members of the public.

No hardship, loss, benefit, nor penalty may be imposed on an employee as punishment for:

- a) Filing or responding to a bona fide complaint of discrimination or harassment;
- b) Appearing as a witness in the investigation of a complaint; or
- c) Serving as an investigator.

Please report any retaliation under the processes set forth in the Problem Resolution and Grievance Procedures set forth in Section 14 of this Manual. Any report of retaliatory conduct will be objectively, timely and thoroughly investigated by the City. Retaliation or attempted retaliation is a violation of this Manual and anyone who retaliates or attempts to retaliate will be subject to disciplinary action, up to and including termination.

6.1.1 Purpose

The City seeks to maintain a quality working environment for all employees and our customers. Employees deserve to work in an environment free from intimidation, humiliation, insult, and harassment. Employees should not be subject to offensive physical or verbal abuse or actions of a sexual, ethnic, racial, religious, or other discriminatory nature, nor shall they inflict harassment upon others. The City prohibits the printed or electronic distribution, circulation, or copying of any such material. Harassment is an offense first against a specific employee or group of employees, and second, an offense against the City.

6.1.2 Definitions

- a. Harassment refers to physical or verbal actions that have the purpose or effect of either creating a hostile, offensive, or intimidating working environment and/or having an ethnic, racial, religious, sexual, or other discriminatory basis. For purposes of this policy, harassment is defined as unwelcome or unsolicited comments, gestures, or physical contact where:
 1. Submission to or rejection of the conduct becomes the basis for an employment decision affecting an employee; or
 2. The conduct unreasonably interferes with work performance or creates what a person would view as an intimidating, hostile, or offensive working environment.

Examples include, but are not limited to: unwelcome physical contact; racial or ethnic, sexual, or religious related jokes, comments, insults, or cartoons; innuendoes and/or personal conduct or mannerisms that could be construed as offensive to a reasonable person.

- b. Under Title VII of the Civil Rights Act of 1964, as amended and the Montana Human Rights Act, sex discrimination is defined as unwelcome sexual advances, requests for favors, and other verbal or physical contact of a sexual nature when:
1. Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment;
 2. Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or
 3. Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

Examples of Sexual Harassment

Sexual harassment can range from subtle pressures for sexual activity to physical assault. Examples of this conduct include, but are not limited to:

- a. Sexual advances which are unwelcome (this includes situations which began as reciprocal attraction but later ceased to be reciprocal);
- b. Sexual gestures such as leering, staring, or making obscene signs with body parts;
- c. Displaying sexually suggestive objects, pictures, cartoons, calendars, or posters;
- d. Sexually oriented jokes, limericks, poems, stories, and related teasing;
- e. Verbal or written comments of a sexual nature such as suggestive letters and invitations, telephone calls, pressure for sexual favors or dates, or comments about body parts or sex;
- f. Reprisals or threats after negative response to sexual advances;
- g. Employment benefits effected in exchange for sexual favors;
- h. Use of terms such as "dear", "honey", "doll", "babe", "sweetie", or "hunk";
- i. Physical contact including assault, attempted rape, and deliberate unsolicited touching of another person's hair, body, or clothing including hugging, kissing, patting, bumping, pinching, grabbing, stroking, leaning over, cornering, or massaging neck or shoulders; and/or
- j. Allowing an environment in which offensive behavior is so pervasive that it becomes intimidating or hostile.

6.1.3 *Employee's Responsibility*

- a. Employees must report incidents to the following:
 1. The individual exhibiting harassing behavior. Inform them that their behavior is unwelcome, offensive, or inappropriate. Request the behavior stop immediately, but do not assume that the problem will go away.
 2. The first level supervisor who is not involved in the alleged harassment, the Department Head, or Human Resources.
- b. Employees who believe they are victims of harassment must report the incident(s) and/or action(s) as soon as possible after the alleged harassment occurs. Employees are responsible to take action if they feel they are being harassed.
- c. Employees who are aware of possible harassment of others or who are not personally the victims of harassment but observe actions they interpret to be harassment, are expected to bring the actions to the attention of their supervisor, Department Head, or HR.
- d. All employees shall cooperate with the investigation and verification of reports.

6.1.4 *Management's Responsibility*

- a. Upon receipt of a report of sexual harassment, management shall promptly inform Human Resources regardless of the perceived merit of the complaint. Any supervisor made aware of possible harassment must promptly advise HR. Failure to report harassment may result in disciplinary action. HR will then inform either the City Manager, or designee, City Attorney, and/or the Police Chief, assuming these individuals are not subject to the allegations and investigate the allegations or appoint an investigator. The Police Department may be requested to conduct a formal investigation of the allegations. During investigations of this nature, the investigator will act in an administrative capacity under the general direction of HR and City Attorney. If the allegations involve the City Manager, City Attorney, Police Chief or member of HR, an independent investigator may be appointed.
- b. A report of harassment, its investigation, the outcome of the investigation, and any action(s) taken relating to a specific employee is confidential unless prohibited by applicable law. Dissemination of confidential information shall be limited to persons who require the information to conduct the related investigation or by application of law or court order.
- c. The investigation may include interviews with the employee who filed the complaint, the alleged harasser, and other employees (including former employees) with knowledge of the alleged actions. The interviews will be documented with signed statements.
- d. Action taken by management, including disciplinary action when appropriate, to resolve the complaint will be based on facts verified during the investigation. Actions may include, but are not limited to, education about harassment,

counseling, increased office awareness, disseminating the City's policy and procedure, and taking action with respect to non-employees which result in reports of harassment of employees in the workplace.

- e. If alleged harassment occurred more than one year prior to the filing of a report, management is not obligated to investigate or respond to the report.

6.1.5 *Violations of Policy*

- a. Substantiated violations of this policy may result in disciplinary action up to and including discharge, if the initial violation is sufficiently severe or if lesser violations are repeated.
- b. If, after investigating any complaint of harassment the City finds that the complaint is fabricated, or that an employee has provided false information regarding the complaint, disciplinary action may be taken against the individual who provided the false information.
- c. No employee who files a complaint or assists/participates in the investigation of a complaint will be retaliated against.
- d. A follow-up review will be completed within six (6) months after harassment allegations have been confirmed to ensure the sexual harassment has discontinued and all parties involved are not subjected to retaliatory behaviors.
- e. If disciplinary action is taken as the result of a report of sexual harassment, the employee subject to disciplinary action objects to such disciplinary action, the employee must utilize the Problem Resolution and Grievance Procedure under this manual as provided in Section 14, or under his or her relevant grievance procedure under the applicable CBA.

7.1 Purpose

The City will not tolerate workplace violence, or the threat of violence, by any of its employees, customers, the general public, and/or anyone who conducts business with the City. The City intends to provide a workplace that is free from physical attacks, verbal attacks, harassment, property crimes, threats, or any other violent acts. Acts or threats of violence may result in disciplinary action, including termination.

7.2 Reporting Violations

Any employee who becomes aware of another employee or person violating the City's policies against acts or threats of violence, weapons, or both has a duty and an obligation to properly report such violations by either or both notifying a direct supervisor immediately or dial 911 if the situation poses an immediate emergency. After reporting alleged violations, the City will promptly investigate the allegations and will take the appropriate action.

7.3 Threats

A threat involves statements or suggestions of a possible physical attack and is taken seriously. Any instance where an individual's personal safety is threatened, including statements like "If you do that, I will hurt (or kill) you" or "I'm going to get you," qualifies as a threat. Threats are significant because they may precede actual acts of violence. There is also evidence that threats may produce significant psychological damage to the recipient. Stalking any individual is also considered a threat. Threats will be evaluated and appropriate response will be pursued.

7.4 Property Crimes

Some people express their anger and aggression through physical acts. This tends to result in property crimes, including sabotage, theft, vandalism, and destruction.

7.5 Physical Attacks

Some people express their anger and aggression through physical attacks on other people. This includes physical acts such as shoving, pushing, hitting, or other aggressive or unwanted contact occurring between two people. Any physical attack is considered assault and may be pursued as such.

7.6 General Policy

7.6.1 Employees involved in personal disputes resulting in injunctions, restraining or court orders are asked to include their work location on the court order. The City requests that employees inform their supervisor when they are involved in the issuance of such an order. Any employee who has not secured a court order, but fears for his or her safety is asked to notify the applicable supervisor and Police Department.

7.6.2 Report every incident of violent behavior in the workplace, regardless of who commits the incident. The Police Department will conduct an investigation. The City Manager or a designee will determine the appropriate corrective action to be taken, which may include, but is not limited to:

- a.* Assessing an employee's fitness for duty (through physician and mental health professional evaluation) and selecting intervention techniques;

- b.* Establishing methods of protection for co-workers and other potential targets;
 - c.* coordinating actions with affected parties such as victims, families, employees, media, or law enforcement personnel;
 - d.* Referring victims to appropriate assistance and community service programs;
 - e.* Ensuring immediate and ongoing counseling is available to victims.
- 7.6.3 Employees who report actual or implied violent behavior will not be subject to any form of retaliation.
- 7.6.4 False or malicious reporting of violent behavior will result in an investigation of the reporting individual(s) and appropriate corrective action.

8.1 Purpose

The City has a vital interest in maintaining safe, healthful, and efficient working conditions for its employees. Being under the influence of a drug or alcohol on the job poses serious safety and health risks to the person under the influence, all coworkers, and our customers. The City has established guidelines with regard to use, possession or sale of alcohol and/or illegal drugs or other controlled substances. These guidelines apply to all City employees.

8.2 Drug-Free Workplace

As the City is a recipient of Federal funds, and in accordance with the federal Drug-Free Work Place Act of 1988, the City maintains a drug free workplace. Employees are obligated as a condition of employment to refrain from unlawfully manufacturing, distributing, dispensing, possessing, or using controlled substances or illegal drugs, including but not limited to marijuana, in the workplace. Employees whose position or function receives federal funding must notify their supervisor of any conviction or no contest plea related to a drug charge within five days of disposition. Employees found to be in violation of this policy are subject to disciplinary action, including participation in a drug-abuse assistance or rehabilitation program, or discharge.

8.3 Substance Abuse Standards

8.3.1 The manufacture, possession, use, distribution, sale, purchase, or transfer of, or being under the influence of, alcohol, illegal drug, or controlled substance is strictly prohibited while on City premises or while performing City business.

8.3.2 Although not encouraged, gifts of alcohol given or received by employees, but not opened or consumed on City premises, are not considered a violation of this policy.

8.3.3 Employees are not permitted to work while under the influence of any illegal drug, controlled substance, or alcohol. Supervisors who suspect an employee is unfit for duty may suspend that employee pending further investigation. Individuals who appear to be unfit for duty may elect to take or may be subject to drug or alcohol screening or a medical evaluation. Employees found to be working under the influence are subject to disciplinary action, including termination from employment.

8.3.4 The use of controlled substances will not be tolerated if:

- a. The use adversely affects an employee's job performance;
- b. The use jeopardizes the safety of other employees, the public, or City facilities;
- c. The use jeopardizes the security of City finances or business records; and/or
- d. The use adversely affects citizen's or the public's trust in the ability of the City to carry out its responsibilities.

8.3.5 Employees undergoing prescribed medical treatment of a controlled substance that may affect the safe performance of their duties are required to report this treatment to their supervisor and HR through their personal physician. When possible, employees will be allowed to retain employment, and may receive a temporary reassignment if their treatment adversely affects the work environment.

- 8.3.6 The City recognizes that alcoholism and/or drug abuse is a treatable illness. The City shall not discriminate against employees based on the actual or perceived nature of an illness. Employees who seek assistance for a substance abuse problem will not have their job security threatened. Employees who have a substance abuse related illnesses are offered the same options for referral and treatment that are afforded to employees having other illnesses.
- 8.3.7 Supervisors who suspect an employee of on-the-job substance abuse will immediately remove the employee from the work environment. The supervisor may then either suspend the employee or bring their concerns to the attention of the Department Head and/or Human Resources so further action may be taken.
- 8.3.8 An employee who voluntarily seeks treatment for a substance abuse problem, which requires a leave of absence for treatment, shall be granted such leave of absence and further shall be eligible for benefits under the specifications of the existing insurance or indemnity policy. Employees may use FMLA and accrued benefits for such treatment, any further leave of absence will be unpaid.
- 8.3.9 Nothing in this policy is construed to prohibit the City from its responsibility to maintain a safe and secure work environment for its employees. The City may, at its sole discretion, invoke disciplinary actions as appropriate for employee misconduct related to the use or abuse of alcohol or drugs or both.
- 8.3.10 All testing for the purposes of detecting drug or alcohol use will be performed in accordance with the provisions of MCA §39-2-207 and 49 CFR § 40. A copy of the City of Great Falls Drug and Alcohol Testing Policy and associated procedures will be provided to all employees required, as a condition of their employment, to hold a Commercial Driver's License. These employees are required to sign the Notification Letter attached to the Policy upon hire.

9.1 Standards of Conduct

9.1.1 Purpose

Standards of conduct are established so all City employees can work together and serve the public efficiently, effectively, safely, and amicably. By accepting employment here, employees have a responsibility to the City and their co-workers to adhere to certain rules of behavior and conduct. These rules are not designed to restrict rights, but rather to provide an understanding of the City's expectations of employee conduct and what is necessary to effectively conduct daily business.

9.1.2 Basic Expectations

Employees are expected to follow City policies and rules and respect the rights, property, and privacy of co-workers and residents and businesses the City serves. In addition to other standards communicated or reasonably expected by the City, employees explicitly may not:

- a. Fight with, physically abuse, threaten, intimidate or coerce co-workers or others on or off City premises at any time, for any purpose.
- b. Destroy, deface, misuse, damage, misappropriate, make unauthorized use of or wrongfully acquire property, documents, funds or assets belonging to the City or others.
- c. Be under the influence of or possess any intoxicant, controlled substance (except as prescribed by a licensed physician and which does not impair work performance), or illegal drug, during working hours and/or on City owned or controlled property. Tests to determine drug and alcohol use will be utilized where permitted by law and will conform to the Code of Federal Regulations, Title 49, Part 40 (49 CFR 40). For more information, see Section 8.
- d. Conduct any unauthorized gambling on City property or when on duty.
- e. Violate security or safety rules or fail to observe safety rules or City safety practices; fail to wear required safety equipment or tamper with the City equipment or safety equipment.
- f. Be in unauthorized possession of dangerous or illegal firearms, weapons, or explosives on City property or while on duty.
- g. Engage in criminal conduct or acts of violence, or make threats, or provocation of violence toward anyone, fight, engage in horseplay, or negligently damage City property.
- h. Refuse to obey instructions properly issued by any supervisor pertaining to work or refuse to assist in any way required by a department. Fail to follow established City and department policies and procedures.
- i. Behave in a manner that is offensive to others or conduct themselves in a manner contrary to recognized professional standards.

- j. Engage in an act of sabotage; willfully or with gross negligence cause the destruction or damage of City property or records, or the property of co-workers, citizens, suppliers, or visitors in any manner, or
- k. Release or disseminate confidential information regarding employees, public, or others.
- l. Falsify or misrepresent information on their employment application or other work record; misrepresent use of leave; falsify a reason for a leave of absence or other data requested by the City; or alter City records and/or documents.
- m. Fail to report to a supervisor or HR, of any act which is not in compliance with these or other City personnel policies.
- n. Engage in malicious gossip and/or spread rumors; engage in behavior designed to create discord and lack of harmony; interfere with another employee on the job; willfully restrict work output or encourage others to do the same.
- o. Engage in activity contrary to that expected by the terms of applicable CBA, licensing or certification.

9.1.3 Interactions with Public

Employees who interact with members of the public must:

- a. Be courteous, polite and respectful;
- b. Be responsive and timely to public requests; and
- c. Seek to resolve issues and be problem solvers.

Unfortunately, despite employees' efforts, there are occasions when interactions with the public become strained. While debate on public issues should be uninhibited, robust, and wide-open, and may result in unpleasantly sharp attacks, employees are not expected to tolerate threats or abuse from the public or elected officials. If this occurs, the employee should advise the person that the conversation or telephone call will be terminated and terminate the conversation or call until the conversation can proceed without such threats or abuse.

9.2 Outside Employment

Full-time employees of the City are expected to consider their positions here as their primary employment. If a City employee secures supplemental employment, Management requests that a supervisor be notified. Supplemental employment will not be considered an acceptable reason for poor job performance, absenteeism, tardiness, or refusal to work overtime as business demands may require. If supplemental employment interferes with City employment, an employee may be required to cease that supplemental employment or be terminated. Employees may not solicit on behalf of or promote any outside or private employment during their work shift.

9.3 Personal Conduct Outside the Workplace

Any personal activity outside City employment cannot interfere with an employee's ability to perform assigned duties properly or undermine the employees' ability to perform job duties. Activities away from work must also avoid any impression of a conflict of interest.

9.4 Dress Code Standards

Public employees are responsible for ensuring that their personal appearance and hygiene represent a favorable image of the City. Impressions, both positive and negative, are formed partly by appearance. Employees are to be well groomed and dressed in clothes that are clean, not excessively worn, and appropriate to the type of service they are providing. It is important to portray a positive image of our professionalism and commitment to service.

9.4.1 *Departmental Application of Dress Code Policy*

Department Heads are responsible for designating, informing, interpreting, and enforcing appropriate attire for their employees. Variations between departments will occur (e.g., one department may be allowed to wear jeans and another may not). The goal is to administer the dress code consistently within each department. The Department Head may allow exceptions to the following Dress Code Standards (e.g., athletic shoes, t-shirts, jeans, caps/hats, etc.) when deemed acceptable.

9.4.2 *Dress Code Standards for Non-Uniformed Personnel:*

a. "Business casual" may be acceptable dress. Employees should dress according to the day's events, meetings, etc. Business casual should present an appearance of professionalism, and can be defined as:

Women

Suits; dresses; skirts; slacks; khakis; skorts; culottes; sweaters; blouses; dressy t-shirts; shirts with City logo; jackets; and vests.

Men

Suits; khakis; dress, sport, or golf shirts; vests; shirts with City logo; slacks; sport jackets; and sweaters. Ties are welcomed.

b. Clothing should be neat, clean, free of body odor, and not be wrinkled.

c. Clothing with offensive/obscene language written on it is not allowed, nor is any advertising alcohol or tobacco products permitted.

d. Clothing that is excessively revealing (including mini skirts, low cut tops, midriff exposed clothing, etc.) is not allowed.

e. Athletic shoes and caps/hats are generally not acceptable, unless the type of work warrants their wear and the supervisor approves.

9.4.3 *Disciplinary Action for Violation of Dress Code Policy*

Employees wearing inappropriate attire will either be informed not to wear the attire again, or sent home to change into appropriate attire (in such case employee shall use vacation leave or leave without pay for the time away from work). Subsequent offenses will result in further disciplinary action.

9.5 Personal Phone Calls and Electronic Device Use

Keep personal phone calls and personal electronic device use (including cell phones, tablets, computers or other devices) to a minimum so as to not interfere with an employee's work duties. Generally, receptionists' phones should not be used for personal phone calls, as these phones are an office's main connection to customers. Personal long distance phone calls on the City's phone system are not permitted. Limited local area calls on City phones, as well as limited use of personal cell phones, for essential personal business are allowed. Do not abuse this privilege. Emergency calls regarding family illness or injury, changed family

plans, or similar calls may be made at any time. Incoming urgent calls will be directed to employees.

9.6 Cellular Phone Use

The Official Code of the City of Great Falls Section 10.39.110 prohibits employees from using a mobile telephone or hand held electronic communication device while driving a motorized vehicle or bicycle, regardless of whether the cell phone was issued for business use or is the employee's personal cell phone, unless during emergencies or while using hands free devices. Safety must come before all other concerns. While driving, employees must pull off to the side of the road and safely stop the vehicle before placing or accepting a call. Special care should be taken in situations where traffic or inclement weather is present. Employees who are charged with traffic violations resulting from the use of their phone while driving will be responsible for the cost of the traffic violation and may be subject to disciplinary action. **Use of cellular phones or hand held communication devices while operating or working around equipment and/or machinery is prohibited.**

9.7 Mail

Employees must not use the City's address as a personal mailing address and must not use City postage or letterhead for personal correspondence. Employees may not use departmental mail codes or City-purchased postage to send personal mail. If an employee does so, he or she will be subject to disciplinary action, up to and including termination.

9.7.1 Opening Other People's Mail

Department heads have the discretion to set policy in each department for the procedure of opening mail. Generally, the City considers any piece of mail addressed to any employee as City property and public record. Staff assigned to open and/or route mail in each department may open general mail so it may be date-stamped. Letters marked confidential should not be opened, but given directly to the addressee or the Department Head.

9.8 Theft

The City will not tolerate property theft. Property theft is considered the unauthorized use of City services or facilities, or the taking of any City property for personal use. The following list of examples is not all-inclusive, but provides illustrations of several activities that are considered theft.

9.8.1 Use of City Copy Machines for Personal Use

Office copiers are not provided as a free service to employees. Department Heads should use their discretion in allowing personal copies and/or establishing reimbursement for personal copies. Do not abuse any copying privileges given. An employee may, for example make a copy of a recipe, but do not attempt to copy a cookbook.

9.8.2 Use of Computers

The City's personal computers (personal computers in the office, or laptops made available for work away from the office) are to be used for City purposes. Any use of City computers for outside employment endeavors is strictly prohibited. Keep personal use of computers to a minimum; it cannot interfere with employee's work duties. This includes accessing personal e-mail or entertainment through the City's computer system. All such access should be made through the employee's personal devices. Do not abuse this privilege.

9.8.3 *Use of Fax Machines*

Keep personal fax use to a minimum. Long-distance faxes, like long-distance phone calls, are charged at a higher rate than local faxes. Employees are required to reimburse their departments one dollar for each page which is sent long distance. Limited local faxes for essential personal business are allowed. Do not abuse this privilege.

9.8.4 *Taking of City property*

No item purchased or supplied by the City should ever be removed from City premises without express authorization of an immediate supervisor. Unauthorized possession or removal of City property is a very serious offense. Any violation of this policy may result in immediate discipline up to and including termination.

9.9 **Restricted Areas**

In the interest of safety and security, some City facilities may be restricted to authorized personnel only. Such areas will be clearly marked.

9.10 **Social Media Guidelines and Usage Policy**

9.10.1 *INTERNAL POLICY*

The purpose of this document is to define the social media policy for City employees. Social media includes all means of electronic communications or posting information or content of any sort on the internet through web logs, blogs, social networking or affinity web sites, web bulletin boards or chat rooms, including personal usage. To address the fast-changing landscape of the internet and the ways the public communicates to obtain information online, City departments may consider using social media tools to reach a broader audience. The City encourages the use of social media to further the goals of the City, the missions of its departments, where appropriate to create a community and connect with others. This policy is in addition to, and complements, any existing or future City employment policies regarding, but not limited to, Ethics in the Workplace (Section 4), Employee Conduct (Section 9), and Technology Policies (Section 13) this Manual.

a. *Personal Use*

Employees shall not use City social media sites for personal communications. An employee's personal site should remain personal in nature and be used to share personal opinions and non-work related information. Following this principle helps ensure a distinction between sharing personal and City views.

If an employee chooses to comment/post about official City business on any personal site, the employee should post their name and role, and add the following disclaimer: *“The postings on this site are my own and do not reflect or represent the opinions of the City for which I work.”*

Employees must never use a City e-mail account or password in conjunction with any personal social media/networking site.

b. *Professional Use*

All official City-related communication through social media/networking outlets should remain professional in nature and should always be conducted in accordance with City policies, practices, and expectations. Employees must not

use City social media/networking sites for political purposes, to conduct private commercial transactions, to engage in private business activities, or for any reason which violates City policy or applicable law.

City employees should remain mindful that inappropriate usage of official City social media/networking sites may be grounds for disciplinary action. If social media/networking sites are used for official City business, the entire City site, regardless of any personal views, is subject to best practices guidelines and standards.

Only individuals authorized by the Department Head may publish content to a social media/networking site. Employees should attempt to ensure that any photos/images/recordings are used with permission of the copyright owner and/or are royalty-free stock photos. In order to provide accessibility, City employees should make sure any information contained in a photo/image/recording is also available as text.

Social media may be used to post City-related news, events, and updates and should work in coordination with the City's official website.

c. Approval and Registration

New social media sites must be approved by the Department Head and the City Manager's Office by completing a Social Media Site Request Form. This form must be approved prior to the creation of any new social media sites or pages. All approved Social Media Site Request Forms will be forwarded to the Office of the Communications Specialist to ensure fulfillment of records retention requirements.

All City social media sites must have at least two Site Content Managers for redundancy purposes. Site Content Managers must complete a Computer Access Form authorized by the Department Head and submit it to the Information Technology office. Site Content Managers are required to provide their Department Head with the login information to access the social media account in the event the employee becomes unable to perform their duties.

d. Oversight and Enforcement

Employees representing the City through social media outlets or participating in social media features on City websites must maintain a high level of ethical conduct and professional decorum. Failure to do so is grounds for revoking the privilege to participate in City social media sites and may subject the employee to disciplinary measures, up to and including termination.

Appropriate and respectful content must be presented following professional standards for tone, good grammar, spelling, brevity, clarity and accuracy; use of jargon and acronyms should be minimized.

City employees recognize that any content posted on social media websites is public and may be considered a representation of the City. Social media should not be used to circumvent other policies and/or procedures. The official City website is <https://greatfallsmt.net> and should be utilized in unison with City social media sites.

Site Managers should closely monitor the sites they are responsible for and respond to comments, questions, or requests for removal of information within three days, when feasible. Department heads and the City's Communications Specialist are responsible for oversight of the Site Managers and reserve the right to revoke management privileges if they fail to comply with policy requirements. City employees may not publish information on City social media sites that includes:

- Confidential information,
- Copyright violations,
- Profanity, discriminatory, threatening, intimidating, or derogatory content,
- Partisan political views,
- Commercial endorsements or SPAM, and
- Information which violates Federal, State, or City law and/or policy

Any employee who retaliates against another employee for reporting a possible violation of this policy will be subject to disciplinary action, up to and including termination.

e. *Records Retention*

Social media sites contain communications sent to or received by the City and its employees, and such communications are, therefore, public records subject to Montana records retention laws and guidelines. These retention requirements apply regardless of the form of the record (i.e., digital text, photos, podcasts, audio, and video).

Social media records are captured in a continuous, automated fashion throughout the day to minimize a potential loss of data due to deletion and/or changes on the social media site.

Social media records are maintained in an authentic format (i.e., ideally the native technical format provided by the social network such as XML or JSON) along with complete metadata.

Social media records are archived in a system that preserves the context of communications, including conversation threads and rich media, to ensure completeness and availability of relevant information when records are accessed.

Social media records are indexed based on specific criteria such as date, content type, and keywords to ensure that records can be quickly located and produced in an appropriate format for distribution (i.e., PDF).

The City utilizes an automated archiving solution to comply with applicable public records laws and to fulfill the above record retention requirements.

9.10.2 *EXTERNAL POLICY*

The following three guidelines must be displayed, or made available by hyperlink, on all social media sites.

a. *Moderating of Third Party Content*

The purpose of utilizing social media is to provide timely information regarding the City of Great Falls to its many residents, businesses, and visitors and is

subject to monitoring. The City does not necessarily review posted content on a regular basis.

We encourage users to submit comments. Once comments are posted, the City reserves the right, but does not assume the obligation, to remove inappropriate user-generated posts. Removal criteria includes, but is not limited to, content which:

- Is off-subject or out of context,
- Contains obscene, lewd, offensive, profane, or sexually explicit content,
- Contains confidential or sensitive personal information,
- Contains threatening, harassing, hateful or discriminatory language,
- Incites violence or illegal activities,
- Contains information that reasonably could compromise individual or public safety,
- Consists solely of commercial advertising,
- Promotes or endorses political campaigns or candidates,
- Infringes upon intellectual property, copyright or trademark rights of others,
- Includes spam or links to other sites which violate any City guidelines,
- Violates Federal, State or Local laws, and
- Is requested for removal by subject of the post.

b. *Public Records Law*

The City of Great Falls' use of social media is for informational purposes only. Any content in a social media format that is related to City business, including a list of subscribers and posted communications, is considered a public record and subject to records retention schedules. The City Clerk's office is responsible for responding to public records requests, including those for social media content. Please be advised that users participate at their own risk, taking personal responsibility for comments, username, and any information provided. **Content of social media sites is an effective and accepted form of communication but should not be construed as private.**

The City utilizes an archiving solution to capture, archive, and maintain records of City-connected social media account activity to comply with applicable public records laws and to fulfill record retention requirements.

- c. The City of Great Falls' use of social media is for informational purposes only and the City assumes no responsibility or liability for content not posted by the City. Posted comments do not necessarily reflect the views of the City of Great Falls. The City is not responsible for the security of social media sites and/or any applications that reside outside the City's domain. Communications sent via the internet or through social media sites shall in no way be deemed to constitute legal notice to the City of Great Falls and/or any of its employees where notice to the City is required by any law, rule, regulation or contract. The City's official source of information is <https://greatfallsmt.net>; a full disclaimer regarding the City's social media use may be found at <https://greatfallsmt.net/general/social-media-disclaimer>.

10.1 Pay Period and Hours

The payroll workweek begins Sundays at 12:00 a.m. and ends Saturdays at 11:59 p.m. Pay periods are biweekly and end on every other Saturday. The pay date will occur on Wednesday eight (8) working days after the end of the pay period. If a scheduled payday falls on a holiday, payroll will be issued on the work day preceding the holiday.

An employee who leaves employment of the City will be paid all unpaid wages due on the next regular pay day for the pay period during which the employee was separated from employment OR 15 calendar days from the date of separation from employment, whichever occurs first, either through the regular payroll process or by mail, if requested by the employee.

10.2 Deductions from Paycheck

There are deductions from each employee's gross earnings each pay period. Some are required by law (mandatory) and others are voluntary. Deductions are itemized on each employee's check stub.

10.2.1 Mandatory Deductions

a. Federal and State Taxes

The amount of taxes deducted depends on an employee's earnings and W-4 form. An employee whose number of dependents or exemptions changes should complete and submit a new W-4 Form to HR, as changes affect withholdings. Employees receive a W-2 Form annually indicating the tax amount withheld.

b. Social Security

Social Security deductions are made pursuant to Federal laws and regulations.

c. Medicare

Regular employees (and uniformed personnel hired after April 1, 1986) are subject to a Medicare (or hospital insurance) deductions are made pursuant to Federal laws and regulations.

d. Retirement Systems

• Public Employees' Retirement System (PERS)

PERS membership is mandatory for City employees not covered by another state retirement plan working an excess of 960 hours per fiscal year and optional for those working less than 960 hours per fiscal year. Working retirees have specific rules applicable to them; contact HR for details.

• Firefighters' Unified Retirement System (FURS)

Membership in FURS is mandatory for all City firefighters.

• Municipal Police Officers' Retirement System (MPORS)

Generally, membership in MPORS is mandatory for all City police officers hired after July 1, 1977. MPORS is a complex system. All new officers are encouraged to review their MPORS Handbook for deduction details.

e. Other Mandatory Deductions

Employees will be notified when the City has been directed to take any other mandatory deductions from their paycheck, such as court-ordered garnishments.

10.2.2 *Voluntary Deductions*

a. *Deferred Compensation (ICMA)*

Each employee may choose to participate in the City's deferred compensation program, which sets aside a portion of earnings for retirement. See §11.6 herein.

b. *Community Service Contributions*

Employees may be offered the option to consider offering a tax-deductible contribution to non-profit, community service organizations. Employees who choose to make a donation may opt to have this contribution automatically deducted from their earnings.

c. *Union Dues*

Employees covered under Collective Bargaining Agreements (CBA) are required to pay dues or a representation fee. These employees sign a form, which is then kept in their Personnel File, authorizing the deduction of dues or the fee.

d. *Other Voluntary Deductions*

There are several other voluntary payroll deductions available to employees. Some are department- or union-specific while others offer additional savings options. See the City's Payroll Technician for more details.

10.3 **Error in Pay**

Every effort is made to avoid errors on paychecks. Employees who believe an error has been made on their paycheck must tell their supervisor **immediately**. HR and/or Fiscal Services will work with the employee and the supervisor to research the problem and make any necessary corrections once payroll is completed. For errors that do not involve pay, such as time charged against an employee's compensatory accrual when the employee requested to use vacation leave, employees must notify their supervisor and/or payroll by the following pay period in order for adjustments to be made. Exceptions will be considered on a case by case basis, and must be approved by the department head and Human Resources.

10.4 **Time Records**

By law, the City must keep accurate records of time worked by "non-exempt" or hourly paid employees. Departments are required to submit time records on behalf of their employees to Fiscal Services in order to process payroll. Employees are responsible for their time record and are expected to accurately report the time they have worked. Inaccurate time reporting is cause for disciplinary action. Do not alter another person's time record, or influence anyone else to alter a time record; doing so is cause for disciplinary action.

10.5 **Overtime**

Employees are expected to perform overtime as needed as a condition of employment. Non-exempt, non-uniformed employees will either be paid one and one-half times their regular hourly wages for any time worked over 40-hours per week in a seven day work week or be given commensurate time off work during that same work week. CBA's outline how overtime will be compensated in detail. There are two types of overtime work:

10.5.1 *Scheduled Overtime*

Scheduled overtime is planned, may involve an entire department, and becomes part of the required workweek. Supervisors or Department Heads will review employee requests to be excused from performing scheduled overtime on a case-by-case basis.

10.5.2 Unscheduled Overtime

Unscheduled overtime generally results from extenuating circumstances where extra time is needed to complete work normally completed during regular hours. Employees need advance approval from their supervisor for unscheduled overtime.

10.6 Salary Plan

For information on the City's job classification and pay system, please refer to the Classification and Compensation Plan, which is kept in Human Resources. The City Manager sets the wages for non-CBA covered employees.

10.7 Voluntary Termination of Employment

The City requests that employees who terminate voluntarily will give at least two weeks written advance notice.

Full-time employees enjoy all of the benefits described in this Manual as soon as they meet the eligibility requirements for each benefit. Part-time employees should review each policy for eligibility information. Short-term or temporary employees are not eligible for certain benefits.

11.1 Retirement

The City participates in Montana Public Employees' Retirement Administration (MPERA). MPERA administers eight retirement systems, including the Public Employees' Retirement System, the Firefighters' Unified Retirement System, and the Municipal Police Officers' Retirement System. Each system provides retirement, disability, and death benefits to plan members and beneficiaries. Benefits are based on age and/or years of service and final average salary. Membership in a retirement system is generally mandatory for all City employees not otherwise covered by a state retirement plan. New employees who have previously worked for an agency subject to the regulations of MPERA can receive credit for past service. Employees should refer to their respective Membership Handbook for details.

11.1.1 *Public Employees' Retirement System (PERS)*

PERS generally covers City employees not covered under another MPERA retirement system. PERS was established in 1945 and is governed by Title 19, Chapters 2 and 3, MCA. Member rights are vested after five years of service. Employees contribute a portion of their gross salary, and the City and State contribute to match each employee's contribution. Employees have several options under PERS and should refer to the PERS Membership Handbook for details.

11.1.2 *Firefighters' Unified Retirement System (FURS)*

FURS is mandatory for all City firefighters. FURS, established in 1981, is governed by Title 19, Chapters 2 and 13, MCA. Member rights are vested after five years of service. Employees contribute a portion of their gross salary; the amount will vary depending on their hire date. Regardless of hire date, the City and the State contribute to match each employee's contribution. Employees have several options under FURS and should refer to the FURS Membership Handbook for details.

11.1.3 *Municipal Police Officers' Retirement System (MPORS)*

MPORS covers the City's police officers. MPORS, established in 1975, is governed by Title 19, Chapters 2 and 9, MCA. Membership rights are vested after five years of service. Employees contribute a portion of their gross salary; the amount varies depending on their hire date. Regardless of hire date, the City and the State contribute to match each employee's contribution. Employees have several options under MPORS and should refer to the MPORS Membership Handbook for details.

11.2 Paid Leave of Absence

11.2.1 *Annual Leave (Vacation)*

Employees begin accruing annual leave on their start date and may use annual earned leave credits for absence with pay at the employee's request and with prior approval from the supervisor, after completing six months of continuous employment.

a. Accrual and Use of Annual Leave

All employees, except short term, earn annual leave credits from the first full pay period of employment. Part-time employees are entitled to prorated annual leave benefits.

b. Annual Leave Entitlement

Years of Eligible Service	Part-time Employees Leave Earned per Hours Worked*	Full-time Employee Leave Days Annually*
Start Date to 10 years	.058	15 days
After 10 years	.069	18 days
After 15 years	.081	21 days
After 20 years	.092	24 days

* Refer to applicable CBA's as leave may be accrued at a different rate.

c. Eligible Service Calculation

Employees may calculate length of service using any public employment (state, county, city, etc.) in Montana. Employment does not need to be continuous. Employees who provide documentation of eligible previous public employment will be given credit toward annual leave entitlement. Credit will not be given retroactively; calculations will begin on the date documentation is provided.

d. Annual Leave Accumulation

Employees may accumulate two times the total number of annual leave credits they are eligible to earn per year. For example, an employee earning 15 days per year is limited to "carrying" 30 total days of unused annual leave into a third year of accumulation. Excess leave is calculated annually at the end of the first pay period in January. Employees forfeit excess annual leave by March 31 of the following year. When an employee makes a reasonable written request to their supervisor to use excess annual leave and that request is approved, then the employee will have three months or until the end of the next fiscal year to use the excess annual leave.

e. Request for Annual Leave

To take annual leave, employees must request advance approval, either verbally or in writing, from their supervisor. Requests will be reviewed on a case-by-case basis, considering workload and staffing requirements. Consider alternate dates if the original leave request is not approved. Employees covered by CBA's should refer to their relevant agreements for any further details about when and how annual leave may be taken.

When a legal holiday is observed during approved annual leave, an employee will not be charged annual leave for that day. Illnesses during annual leave will not be chargeable against unused annual leave credits if an employee provides written documentation of said illness, and the time off will be charged as sick leave.

f. Compensation for Unused Annual Leave

Upon termination of employment, and completion of the six-month qualifying period, employees will receive compensation for unused annual leave, which will be calculated at the rate of pay at the time of termination.

g. Annual Leave Management

Supervisors manage annual leave and must provide reasonable opportunity for employees to use annual leave, rather than accrue and potentially forfeit excess annual leave. Employees are responsible for making reasonable, written requests to use annual leave during their term of employment, and should work with their supervisors to expend excess annual leave by March 31 (see §11.2.1.d. above).

h. Annual Leave Supplementation

Employees who are receiving Workers' Compensation benefits may supplement their Workers' Compensation benefits with accrued unused annual leave.

11.2.2 Holidays

The City Commission, in accordance with OCCGF 2.18.010, has set holidays for City employees. Except for employees whose CBA's provide otherwise, the following holidays are observed by the City of Great Falls:

- New Year's Day, January 1;
- Martin Luther King Jr. Day, the third Monday in January;
- President's Day, the third Monday in February;
- Memorial Day, the last Monday in May;
- Independence Day, July 4;
- Labor Day, the first Monday in September;
- Veterans Day, November 11;
- Thanksgiving Holiday, the fourth Thursday and Friday in November;
- Christmas Day, December 25; and
- State General Election Day. (State primary elections are not holidays.)

If any of these holidays fall on a Saturday, the holiday will be observed on the preceding Friday. If the holiday falls on a Sunday, the holiday will be observed on the following Monday.

Library and Municipal Court employees should consult that Department's Holiday Schedule for applicable holidays and policies.

- a.* Full-time employees in a paid status receive eight hours of holiday benefits for each holiday. Part-time employees receive prorated holiday benefits.
- b.* Employees covered by a CBA should refer to their agreement for detailed information about holiday observation and compensation.
- c.* An exempt full-time employee whose schedule calls for a day off, but who must work on the day a holiday is observed, is entitled to receive a different day off with pay as agreed to by the employee and supervisor. If a day off cannot be provided, the City will provide at least eight hours of pay at the regular rate, unless the employee is in leave without pay status.
- d.* A non-exempt, full-time employee not covered under a CBA, who works on the day a holiday is observed, who is in a paid status will receive either of the following at the supervisor's discretion:

- Taking the holiday benefit as a paid day off at a later date. The employee will receive pay at the regular rate for every hour worked on the holiday, or
- Taking no day off, but instead receiving the holiday benefit as payment. The employee will receive premium pay (regular rate times 1½) for every hour that employee is required to work on the holiday.

11.2.3 *Sick Leave*

All employees, except short term, accrue sick leave credits. Part-time employees earn prorated sick leave. Sick leave accrual begins on an employee's start date and employees are eligible to use sick leave upon completion of 90 days of continuous employment.

a. *Accrual of Sick Leave*

Sick leave credits are calculated at the end of each pay period. Employees earn sick leave credits at a rate of twelve 8 hour days days per year, or one day per month. There is no limit to the amount of sick leave that may be accumulated during employment.

b. *General Sick Leave Policy*

Employees covered under Collective Bargaining Agreements should refer to those agreements for applicable sick leave policies. Other employees will be paid for days lost under the following circumstances to the extent they have accrued sick leave:

- Employees may be required to furnish medical certification verifying the reason for a sick leave request.
- For purposes of this section 11.2.3., Immediate family members include the employee's spouse, parents, children, and any other members of the employee's household;
- An employee becomes ill, has a medical disability, is in an accident or is otherwise injured, develops a maternity-related disability, or is quarantined as a result of exposure to a contagious disease;
- At the discretion of the department head, when needed to care for an immediate family member, any other member of an employee's household, or other relative who is ill, this leave may not exceed more than forty (40) work hours at any one time, unless it qualifies under FMLA below;
- To attend medical, dental, or eye examinations or receive treatments and for travel time necessary to obtain medical treatment;
- Normally, no more than forty (40) work hours sick leave may be used upon the death of and/or to attend the funeral of an immediate family member or any other member of an employee's household, unless approved on a case-by-case basis by the Department Head or the need for leave qualifies under FMLA below. Supervisors may approve annual or sick leave to attend the funeral of other relatives and friends on a case-by-case basis;
- If the conditions of an employee's absence qualify for coverage under Wage Loss Workers' Compensation Insurance, the employee may choose to take accrued sick leave or Wage Loss Workers' Compensation during the absence. Employees may supplement their Workers' Compensation benefits

only if authorized by the employee's CBA. See HR or the Risk Manager for more information and/or clarification; and

- Employees who become ill, injured, or quarantined during the use of annual leave may use sick leave for that period in lieu of annual leave.

c. Notification of Absence

An employee, or an immediate family member, must notify a supervisor of an inability to report for duty prior to normal report time or as soon as possible. CBA's may contain more detailed information about sick leave reporting requirements. Employees covered under such an Agreement are required to meet the requirements outlined in the Agreement.

d. Abuse of Sick Leave

Abuse of sick leave (including falsifying medical excuses and requesting leave under false pretenses) is cause for disciplinary action including termination and forfeiture of compensation for unused portion of sick leave. Employees on paid sick leave for personal illness/injury are expected to be at home recuperating/rehabilitating unless seeking medical attention.

e. Sick Leave Donation

Employees may donate or receive up to 15 days of sick leave per calendar year from any other employee(s). Any one employee may donate and/or receive only one day of sick leave to and/or from another individual employee. However, an employee may donate one day of sick leave to 15 different individuals each calendar year. Employees will not be granted more donated sick leave than they actually need. Employees requesting donated sick leave must first use all of their accrued leave before donations will be granted (Employees should refer to their respective CBA for further guidelines). HR can provide more details on sick leave donation.

f. Compensation for Unused Portion of Sick Leave

After an employee completes 90 days of continuous service, upon termination of employment, that employee will receive one-fourth of the sick leave balance at the rate of pay at the time of termination.

11.2.4 Jury Duty

Employees will be excused from work under summons to serve as a juror or when subpoenaed to serve as a witness by the court system. Employees dismissed from jury duty prior to the end of a regular work shift are expected to either report to work or contact their supervisor for instructions. Employees choose one of these options concerning pay for court ordered service:

- a.* Employees will only be allowed to keep expense and mileage allowance paid; employees may not keep the juror fee paid by the court. Forward all fees received as a result of the service to the Department Head who will forward it to Human Resources. The fees are then credited against the employee's regular compensation.

-OR-

- b.* Charge court service against annual leave and keep the juror fee and any expense or mileage allowance paid to the employee by the court. Employees will be paid their normal paycheck and will be charged annual leave. Employees will keep all payments received from such service.

11.2.5 ***Military Leave***

The City will comply with all provisions outlined in the Uniformed Services Employment and Reemployment Rights Act, (USERRA, 38 USC § 4031 *et seq.*) as well as all relevant state laws (to include MCA §10-1-1009) covering members of the Montana Army and Air National Guard.

An employee who is a member of the Montana National Guard or any United States military force or Reserve Corps and who has been an employee for a period of six months will be given leave of absence with pay for a period of time not to exceed 120 hours in a calendar year.

Unused leave may roll to the next calendar year, not to exceed 240 hours total for the calendar year. Any excess leave, beyond 240 hours, will be forfeited. Military Leave can be for attending regular encampments, training cruises, and similar training programs of the military forces of the United States.

Employees employed less than six months are entitled to unpaid leave for the purposes listed above. Employees using Military Leave must report it as such on their timesheets and have prior approval for leave. This leave will not be charged against the employee's annual leave.

11.2.6 ***Bereavement Leave (Non-Union Employees)***

The City will grant five (5) days of Bereavement Leave to all regular full-time, non-union employees who may experience the death of an immediate family member. The five (5) days will apply to death of an immediate family member whether in or out of state.

An immediate family member is defined as the employee's spouse, child, stepchild, mother, father, sister, brother, grandparent, grandchild, and corresponding in-laws.

Procedures:

- An employee must notify their immediate supervisor of the need for bereavement leave as soon as reasonably possible. The notification will include the anticipated length of time bereavement leave is required, up to a maximum of five (5) days.
- Any bereavement leave must be approved by the immediate supervisor prior to taking the leave and will be paid at the employee's regular rate of pay.
- When coding timesheets, the employee will utilize the payroll code of "BEREAVE" for the time away from work.
- If additional time beyond the five (5) days of bereavement leave is required, the time may be deducted from vacation or comp leave accruals. All additional requests for vacation or comp leave time should follow the regular time off request procedures. Additional time off may qualify under the Family Medical Leave Act (FMLA).
- The City reserves the right to request proof of bereavement.

11.3 Unpaid Leave of Absence

11.3.1 *Educational Leave of Absence*

An educational leave of absence may be approved if the curriculum is of mutual benefit to an employee and the City. Apply in the same manner as a personal leave of absence (as described in 11.3.4).

11.3.2 *Family and Medical Leave of Absence*

After being employed by the City for at least 12 months, employees may be eligible for leave under the provisions of the Family and Medical Leave Act (FMLA) of 1993. Other provisions regarding such leave may be incorporated into any applicable CBA. Qualifying employees must have worked at least 1,250 hours during the 12-month period preceding any leave taken under this policy. Employees will be required to provide documentation of the need for, length of, and return from, FMLA Leave for medical reasons.

a. *Taking FMLA Leave*

Generally, leave approved under FMLA is taken in consecutive, full-day increments. Where medically necessary, employees may be entitled to intermittent- or reduced-schedule leave. Eligible employees may request, or the City may designate, up to 12 weeks of FMLA leave in a 12-month period for any combination of the following reasons:

- Upon the birth or adoption of a child or foster care of a child. Leave taken for this purpose may be taken within one year of the date of the birth, adoption, or placement;
- When a health care provider determines an employee's presence is needed to care for a child, spouse, or parent who has a serious health condition;
- When employees are unable to perform the functions of their position because they have a serious health condition;
- Qualifying exigency leave for families of members of the National Guard or Reserves or of a regular component of the Armed Forces when the covered military member is on covered active duty or called to covered active duty; or
- Military caregiver leave (also known as covered service member leave) to care for an injured or ill service member or veteran.

b. *Serious Health Condition Defined*

The "serious health condition" referenced above includes those situations where:

- An illness, injury, impairment or physical or mental condition results in inpatient care; or
- When an employee or a qualifying dependent has a period of incapacity requiring absence from regular daily activities for more than three consecutive full work days and is receiving continuing treatment by a health care provider.

Routine physical exams and other short-term health conditions are not considered serious health conditions. Additional information on the definition of a serious medical condition is available from Humans Resources.

c. *FMLA Leave Calculation*

Employees receive a total of 12 weeks during a designated 12-month period. The City calculates FMLA leave availability 12 months forward from the first designated leave date. All qualifying FMLA leave taken during this 12-month period will count toward an employee's 12-week maximum. Questions about FMLA leave calculation should be directed to HR.

Employees can take up to 26 weeks for FMLA circumstance related to military caregiver leave during a single 12 month period. FMLA leave already taken for other FMLA circumstances will be deducted from the total of 26 weeks available.

If both spouses work for the CITY/TOWN and each wishes to take leave for the birth of a child, adoption or placement of a child in foster care, or to care for a parent (but not parent-in-law) with a serious health condition, the spouses together may only take a total of 12 weeks of leave.

d. Benefits during FMLA Leave

During approved FMLA leave, the City will continue to make its regular contribution toward health insurance or indemnity premiums. Employees are responsible for paying any difference between the City's contribution and the total cost of their insurance plan. The City reserves the right to seek recovery of unearned health insurance or indemnity premiums made on behalf of an employee during authorized FMLA leave if the employee does not return to work at the end of the leave period. Employees will not earn annual or sick leave during unpaid FMLA leave (see §11.3.2.h. for details about paid and unpaid FMLA leave).

e. Reinstatement upon Return from FMLA Leave

At the end of approved leave, employees are entitled to restoration to the same position held at the time that they began leave or an equivalent position unless such positions are not reasonably available.

f. Notification Prior to FMLA Leave

When possible, employees should provide at least 30 days notice prior to taking FMLA leave. If sufficient notice is not provided, the requested leave may be delayed for up to thirty days from the notice date. Except in cases of emergency, the request for FMLA leave should be in writing and include the dates and/or times being requested. Employees are expected to provide notice of the need for unexpected FMLA leave within two work days of the issue causing the leave. Once notice of the need for leave is given, the employee will receive notification of the rights, responsibilities, and options related to their leave. If any leave request (including sick or annual) qualifies as FMLA leave, the City may charge the absence to an employee's FMLA leave eligibility.

g. Medical Certification for FMLA Leave

If the FMLA request is for medical leave, the employee will be required to provide a completed and signed *Certification of Physician or Practitioner Form* documenting the serious health condition and the necessity for being away from work before the leave will be approved. Management may request the required information be provided within 15 days. At its discretion, the City will require a subsequent opinion(s) and/or medical re-certification at the City's expense.

h. Use of Paid Leave Prior to FMLA Leave Approval

If an employee has requested FMLA leave **and** is eligible to use annual or sick leave **and** the reason for FMLA leave qualifies under the annual and sick leave policies, the employee *must* substitute any paid sick leave before any unpaid FMLA leave is granted (except for members of the GFPPA). Regardless of paid or unpaid FMLA leave use, the total amount of FMLA leave taken cannot exceed 12 weeks. Employees may not elect or be required to use paid leave for a non-qualifying purpose.

i. Further Information on FMLA

The U.S. Department of Labor has published additional rules related to FMLA in 29 CFR 825. Questions should be directed to Human Resources.

11.3.3 Maternity or Paternity Leave

Employees who have biological or adopted children are eligible for up to 12 weeks of leave after the birth or adoption of the child. Such leave may be taken under any combination of these guidelines:

- a. Eligible employees who have accrued enough time may take up to six weeks of paid sick leave without any medical documentation.
- b. Employees who qualify for additional sick leave, and who have accrued enough time, may take additional paid sick leave. Employees will be required to show certification from their health care provider showing additional time is medically necessary.
- c. Employees may make up any difference between their sick leave taken and the 12 week leave limit with unpaid FMLA leave.
- d. Annual leave may be taken within the maximum 12 week period.

Women returning from maternity leave who wish to continue breastfeeding or separate expression of milk for their child(ren) will be provided a private space (other than a toilet stall) with suitable lighting and electricity if necessary for pumping apparatus. The selection of the space will be made on a case-by-case basis in consultation with the employee. Standard break times will be primarily utilized with additional unpaid break time provided as mutually agreed upon. Additionally, the City will make every effort to provide suitable facilities for milk storage during the employee's daily work period. All requirements listed in MCA 39-2-215, 39-2-216, 39-2-217 will be complied with.

11.3.4 Unpaid Leave of Absence (other than work-related injury)

- a. The City may grant an unpaid leave of absence if a cost/benefit analysis of both direct and indirect costs does not result in a net loss to the City, and the absence does not interfere with the operations of the department or the City. Employees will not be granted an unpaid leave of absence to obtain outside employment.
- b. Employees must use all accrued paid leave before an unpaid leave of absence begins.
- c. Department Heads review and either approve or deny leave of absence requests of 30 days or less. Leave of absence requests of more than 30 days should be submitted to the department head for review and then forwarded to the City Manager for a final decision. Failure to return from leave at the time agreed will result in termination of employment.
- d. During unpaid leave of absence, benefits such as holiday, annual and sick leave do not continue to accrue. Employees self-pay insurance premiums during

unpaid leave of absence. Consult HR to obtain information as to the level and duration of insurance coverage.

11.3.5 *Insurance Premium Payment during an Unpaid Leave of Absence*

During an unpaid leave of absence, except FMLA Leave, employees are responsible for paying the total premiums for insurance coverage selected for themselves and their dependents. Employees who fail to pay these premiums will lose insurance coverage.

11.3.6 *Public Office Leave*

Employees elected or appointed to a public office will be granted an unpaid leave of absence, not to exceed 180 days per year while performing the public service. Employees will be restored to their positions, with the same seniority, status, compensation, hours, locality, and benefits as existed prior to their leaves of absence for public service. Employees must return to work within 10 days following the completion of the service unless they are unable to return due to an illness that has been certified by a health care provider. The City will comply with all relevant restrictions and guidelines provided within the Hatch Act, (5 U.S.C. 7321 through 7326, as amended).

11.4 *Group Insurance Coverage*

The City is interested in the health and well being of employees and their families and offers a health insurance program to its full-time, regular employees. Coverage begins on the first of the month following the employee's hire date. Eligible employees will receive an information packet that explains the health plan and provides the forms necessary to apply for coverage. Employees are responsible for returning these forms to HR within 30 days of hire. Employees who are terminated or lose eligibility to remain covered under the City's group health insurance program may qualify for continued coverage for a limited period of time at their or their dependent's expense. Consult HR for details.

11.5 *Flexible Spending Plan*

11.5.1 *Flexible Spending Account*

The City offers employees the option of redirecting a portion of their gross salary (pre-tax) to provide reimbursement for dependent care and unreimbursed medical expenses. At the beginning of each plan year, employees indicate a specific dollar amount to be reallocated for each of these expenses. This program is renewed annually. Consult HR for details.

11.5.2 *Other AFLAC® Products*

An AFLAC® representative should contact all new regular employees within one month of their hire date. The representative will review each of the policies offered by AFLAC®, including the Flexible Spending Accounts outlined above, with the new employee. Examples of other policies offered include life insurance coverage, cancer policies, accident and disability policies, intensive care policies, etc. Premiums for each AFLAC® policy are deducted from gross earning on a pre-tax basis.

11.5.3 *Open Enrollment*

Each May, AFLAC® offers open enrollment into the flexible spending plans available for the next plan year (July 1 to June 30). Employees may discontinue or enroll in any AFLAC® program at this time.

11.6 *Deferred Compensation Program*

Deferred compensation is payment withheld until a future date. The City has partnered with the International City Management Association Retirement Corporation (ICMARC) and Nationwide Retirement Solutions to offer employees the option of deferring a portion of their gross earnings (pre-tax) into a supplemental retirement savings program through payroll deduction. Employees will be given information about each program during orientation. Employees may decide to participate in either program at any time during their employment. Consult HR for questions regarding these programs.

11.7 Education Assistance

The City of Great Falls encourages the continued education and training of its employees. This program is designed to help employees achieve personal growth and professional development. The benefits to be derived by the employee and the City will be evaluated when considering requests. Departments are not required to allocate funding for the tuition reimbursement program.

The following criteria will be applicable for tuition reimbursement upon approval:

11.7.1 Reimbursement, or direct payment to a facility approved by the Department Head and City Manager, will be paid at 100 percent, with a maximum payable of \$1,500 per calendar year, per employee.

11.7.2 The eligible employee is required to maintain a grade C or equivalent. If a grade C is not achieved and payment has been made in advance, the employee will be required to reimburse the City the full costs which had been paid by the City.

11.7.3 Qualifying classes are job-related and pre-approved by the department head and City Manager. A signed agreement with the employee shall be obtained after approval from the department head and City Manager.

11.7.4 Enrollment with an accredited educational institution is recommended.

11.7.5 Books and related supplies are not included in reimbursement.

11.7.6 Seminars and workshops are excluded from this policy.

11.7.7 Leave to attend an approved course may be granted by a supervisor. Employees are encouraged to make up time missed during the workweek whenever possible.

11.7.8 This policy is not a guarantee that funding will be available. Funding availability depends on training budgets within each department.

11.8 Wellness

The City of Great Falls supports workplace wellness for its employees. This includes the promotion of healthful food and beverages, physical activities during the workday, stress management and preventative screenings each year.

The City is committed to providing and ensuring a safe work environment for all employees and our customers by conducting all operations as safely and efficiently as possible. Safety is the responsibility of every employee – whether it is your own or your coworkers’.

12.1 Safety and Loss Control Program

Upon hire by the City, employees will receive a copy of the *City of Great Falls Safety Manual*. Employees are required to familiarize themselves with the contents of the Safety Manual and sign the Safety Manual's Acknowledgement Form, which indicates they have done so.

12.1.1 Safety Manual Overview

The Safety Manual outlines the responsibilities of Department Heads, department safety coordinators, supervisors, and employees. It provides information on the prevention of slips, falls, back injuries, fire prevention, and information on ergonomics in the workplace in order to prevent cumulative trauma disorders.

12.1.2 General Safety Policy Overview

These safety rules and procedures are not meant to replace any safety rules and procedures already enforced by any department within the City. Each department should have its own standard safety rules and procedures, as well as safety rules and procedures to follow in cases of emergency. Departments are required to review their safety manuals annually and make updates as necessary.

All Employees must:

- a. Not take unnecessary chances or work under hazardous conditions and must understand and use approved safe job methods and recognize potential hazards.
- b. Report any recognizable hazardous condition or procedure, accidents, injuries, or exposure to hazardous substances to a supervisor.
- c. Report needed additional safety training.
- d. Possess a valid driver’s license to operate a motor vehicle. Employees are subject to an annual check of the status of this license.
- e. Only operate machinery or equipment they are authorized and trained to use, and only use tools, machinery, and vehicles that are in safe working order.
- f. Keep an orderly and clean work area.
- g. Consider the safety of others in the performance of duties; do not engage in horseplay, practical jokes, or other careless activities.
- h. Not work while under the influence of certain medications, alcohol, or controlled substances which affect the employee’s ability to perform work duties.
- i. Recognize and report "near misses" to a supervisor; cooperate in the investigation of any accident to prevent its reoccurrence.

12.1.3 *Motor Vehicle and Mobile Equipment Safety*

City vehicles are usually marked with logos and government plates, are easily identifiable, and thus constitute a traveling advertisement seen by citizens. Members of the public closely watch City employees' operation of vehicles and driving conduct. Poor driving conduct generates complaints and poor public perception and is unacceptable. City vehicles used for travel shall be used for business purposes and not for pleasure. Employees must abide by Federal, State and local laws regarding the operation of motor vehicles. Additionally, the following safety rules are established for the use of motor vehicles and mobile equipment:

- a. Before operating a vehicle, check all safety equipment installed on the vehicle, ensure repair of defective equipment, and adjust equipment for use.
- b. When backing up a vehicle, be certain the way is clear.
- c. The City prohibits smoking in City-owned vehicles.
- d. When filling fuel tanks:
 - Shut off the motor of the equipment.
 - Do not smoke near gasoline pumps.
 - Keep the hose nozzle against the edge of filler pipe.
 - Do not fill tank too fast or too full.
- e. All City equipment that is fully enclosed or equipment that has roll bars that are stamped "approved" shall have seat belts and anchoring systems regardless of the age of the equipment.
- f. All heavy equipment must have a dry chemical "ABC" extinguisher in the cab.
- g. Load security:
 - Supplies transported in motor vehicles shall be secured.
 - Drawers in motor vehicles shall be secured.
 - Check and secure all tower equipment prior to movement of the vehicle.
 - Only transport materials, equipment, and personnel necessary to carry on City work in or on City vehicles.
 - Fasten a red flag (or a red lamp at night) to the end of material that extends beyond the tailgate. No material should extend over the sides.
 - Bulk and weight capacity of a vehicle should be observed.
- h. No more than three persons may ride in the front seat of any vehicle. Safe and secure seating must be provided for each person transported in any vehicle. Do not ride on the back or sides of a vehicle unless appropriate manufactured handrails have been installed, and other fastening devices are used for security.

- i.* Parking vehicles:
 - Unless conditions require otherwise, parked vehicles must have the motor stopped, key removed, emergency brake set, and left in gear or in "park."
 - On a downgrade, turn front wheels toward the curb. On an upgrade, turn wheels away from the curb.
 - Do not park vehicles facing traffic, except in case of emergency.
 - Use adequate warning signals (and flag person, if traffic warrants) when vehicles stop on streets or highways.
- j.* Be especially watchful for children and drive carefully and slowly while working near schools, parks, playgrounds, swimming pools, or community centers.
- k.* Keep a distance behind other vehicles so as to avoid tailgating. Do not allow others to tailgate. Slow down, pull to the side, and let them pass.
- l.* Follow these procedures in an accident involving a City-owned vehicle:
 - Render first aid, if necessary.
 - Notify the Police Department or other appropriate law enforcement agency immediately.
 - Remain at the scene of the accident until proper authorities have arrived. Offer no information regarding the responsibility for the accident or what should have been done to avoid the accident.
 - The driver of the City vehicle reports the accident to his or her supervisor; the supervisor reports the accident to the Risk Manager.
 - All claims against the City insurance or indemnity policies are to be forwarded to the Risk Manager within 24 hours of the accident.

12.2 Workers' Compensation

Safety is every employee's responsibility. Unfortunately, accidents do occur in the workplace. Under State law, the City provides workers' compensation indemnity coverage to its employees. The City's current provider is Montana Municipal Interlocal Authority (MMIA), a risk management pool comprised of other Montana cities and towns.

MMIA charges its rates in part by measuring prior workers compensation claims. Employee accidents are detrimental to the operations of the City and when injuries occur, they affect not only the employee, but the employer as well. Serious accidents cause lost work time for the employee and impede City services. Most accidents are preventable – do not take safety short cuts.

State law requires employers keep records of all illnesses and accidents that occur at the workplace or during the course of conducting business. The City requires that employees report work-related illnesses or injuries within 24 hours, no matter how slight. Filing procedures and associated documents are available electronically as shared documents identified in the "Risk Management Forms" folder on the City's intranet. Contact the Risk Manager for guidance on accessing or preparing these forms. If employees fail to report an injury, they may jeopardize their workers' compensation coverage including medical

benefits. State law also provides employees the right to know about any health hazards that might be present on the job. Questions or concerns should be directed to the Risk Manager or the employee's supervisor.

12.2.1 Reporting workers' compensation claims:

- a. Under state law, the **employee** has 30 days to notify his or her supervisor and/or employer of any on-the-job accident, injury, or illness. Verbal notification is sufficient, but requires the supervisor to document the notification and the specifics. This documentation includes having the employee complete an Employee's Loss Control Report and the supervisor completes the Supervisor's Loss Control Report and the Workers' Compensation Form. If there is no medical treatment involved, only the employer signs the Worker's Compensation Form.
- b. The **employee** has one year to file a written claim for workers compensation benefits with HR.
- c. The **employer** has 30 days to respond to the claim.

12.2.2 Employees Do Not Complete the Workers' Compensation Forms

Employees complete the Employee's Loss Control Reports. Supervisors then use the information to complete the Workers' Compensation Form. An accident investigation may be conducted.

12.2.3 If an employee is not available to sign the Workers' Compensation Form, the supervisor must forward the report to the Risk Manager. The form will be filed with the Montana Municipal Interlocal Authority without the employee signature.

12.2.4 All reports are submitted to and maintained by the Risk Manager for processing.

12.3 Seat Belt Use and Compliance with Traffic Laws

Motor vehicles purchased by the City are equipped with seat belts in compliance with Federal motor vehicle standards.

12.3.1 Purpose

The City requires all employees and non-employees riding as passengers with employees use available seat belt equipment in City-owned vehicles or in private vehicles during scheduled shifts. The use of restraint devices reduces the possibility of death or serious injury in an accident.

12.3.2 Seat Belt Use Policy

This policy applies to all City employees while driving or as a passenger in either a City-owned vehicle or a personal vehicle being used for City business.

- a. Employees are required to use and ensure all vehicle occupants are properly using their seat belts before moving the vehicle.
- b. Employees who are observed failing to use seat belts, or are in an accident while not wearing a seat belt, or are cited by law enforcement for not wearing a seat belt will be subject to disciplinary action.

- c. Employees are required to limit the number of passengers in a vehicle to the number of seat belts or other safety restraints.

12.3.3 Compliance with Traffic Laws

Employees are required to comply with all applicable laws when operating City or private vehicles for City business, including but not limited to safety and motor vehicle liability insurance law.

Since the development of facsimile machines, computers, electronic mail, and voice mail, security of and access to information demands a greater level of attention than ever before. The majority of the City's employees have some level of access to electronic equipment, some of which contain sensitive information, require passwords for access, and/or require restrictions on use. Section 13 governs ALL City-owned computer equipment. Please keep in mind that computers, smart phones and other electronic communication devices purchased with City funds are City property and adhere to the same policies. The City's technology policies help enhance productivity by emphasizing consistency and simplicity while maintaining compatibility, connectivity, and security. Violations may result in disciplinary action, up to and including termination.

13.1 Departmental Oversight

The Information Technology Division (I.T.) of the Fiscal Services Department has the authority and responsibility to acquire and maintain all computers and software for the City. The I.T. Division is responsible for all computer hardware, software, and training. All I.T. related needs, including modification or new or expanded software must go through the I.T. Operations Manager and/or the Department Head.

13.2 Hardware

13.2.1 New Installation/Initial Installation of Hardware

Departments propose new installations to I.T. Operations Manager. The I.T. Operations Manager then meets with I.T. staff to determine if it meets overall security and hardware/software requirements. If the new installation proposal does not meet these requirements, I.T. staff will assist in finding alternative hardware/software. Authorized installations are either funded by the I.T. Division and blended into overall internal service charges or the Department is responsible for funding.

13.2.2 Modifications or Upgrades

Computers are modified or upgraded as needed. I.T. must be notified once a Department Head determines that modifications or new or expanded computer needs are necessary.

13.2.3 Peripherals, Local Area Networks (LANs), Computer Linking

No computer modifications, peripherals, VPN's, LAN's, computer linking, routers, hubs, or switches are authorized unless installed by, or under the direction of, I.T. This includes, but is not limited to sound cards, modems, scanners, printers, and compact disk drives.

13.2.4 Passwords

Employees who require computer and/or network access must be authorized by their Department Head. They will then receive a user ID and a password. **Do not share your password(s) with anyone.** Security controls are provided by the Network Operating System to help prevent unauthorized use. Unauthorized use may result in disciplinary action, up to and including termination.

13.2.5 Equipment Revolving Schedules

The I.T. Operations Manager coordinates and maintains equipment revolving and reserve programs for all computer equipment and software. This revolving schedule maintains an efficient and economical computer inventory and replacement schedule for the City.

13.2.6 Equipment Lease Charges

Departments lease computer systems from I.T. The lease does not create an ownership interest in any specific piece of equipment. I.T. will work with computer users to identify and provide for computer equipment needs. Departments may include "department specific" equipment or software in the Equipment Lease Charge structure in order to provide an ongoing funding mechanism for that department.

13.3 Computer Software

13.3.1 Authorized Software

Only those programs authorized by I.T. will be allowed on City computers. The I.T. Division approves software for specific locations before it is installed on a City computer.

13.3.2 Games, Screen Savers, Chat Programs and Instant Messengers Prohibited

No computer games shall be installed or run on City computers. Default screen savers available in Windows may be used. However, no unauthorized screen savers may be installed. Chat programs, games, Instant Messenger programs, and blogs are not allowed.

13.3.3 Live Video and/or Audio Streaming is prohibited

Internet radio stations, movies, programs, and/or live video (including but not limited to sports broadcasts, videos, and peer-to-peer sharing such as torrents) are not allowed on City computers without the permission of your Department Head and/or I.T. Operations Manager.

13.3.4 Software and Data

Any unauthorized programs, screensavers, games, unlicensed copies of authorized software, etc. found on City computers will be removed by I.T. Repeated unauthorized installations will be referred to the I.T. Operations Manager and/or direct supervisor for further action, including disciplinary action.

a. Unlicensed Software

Unlicensed or "bootleg" copies of software are not permitted on City computers. Software is generally copyrighted and licensed. It is a federal crime to copy or reproduce copyrighted software and documentation. Software may only be copied for archival purposes and will only be done by I.T. personnel as required.

b. Property of the City

All programs and data placed on any City computer are the property of the City of Great Falls and can be subject to search without prior notice. The purposeful destruction of data (work-related) is prohibited and may lead to discipline, including termination.

All information, particularly email communication, may be subject to right to know requests; if a request for information occurs, contact the City Clerk and/or City Attorney to arrange response.

c. Information Requests.

Employees should avoid using personal computer, smart phones or other devices to conduct City business as that may subject those devices to public right to know requests.

13.3.5 Passwords

No software program or file access passwords are allowed on City computers, unless pre-approved and recorded with the direct supervisor and the I.T. Operations Manager.

13.4 File Backups

Computers occasionally break down, lock-up, are inadvertently damaged, or may be the subject of theft or vandalism. To ensure that important data is backed up, users should store their files on the “O” network share. The I.T. Division will back up primary network servers to ensure data availability. To ensure that a current copy is on the server, users should log off daily. Personal data (including but not limited to pictures, music or videos) is prohibited on server network shares.

Any files stored in a location other than a network share or “My Documents” is the responsibility of the employee(s). I.T. provides a variety of equipment for backups, including CD/DVD writers, flash drives, and/or external portable hard drives. If an employee is in need of a backup device, he/she will need approval from their manager/supervisor and the I.T. Operations Manager.

13.5 Training

The I.T. Division is responsible for the coordination of computer training for all City operations. Training includes beginner through advanced classes in the City’s primary word processing, spreadsheet, multimedia presentation, e-mail client and other software applications. Training will be conducted throughout the year in the Morony Room in the Civic Center. I.T. will post upcoming training sessions in advance. Employees requiring training on software programs should contact I.T. for training availability. Some self-study courses are available for checkout in the I.T. office. Training is also available on the City’s intranet web site. Formal training classes are periodically scheduled, either on or off-site.

13.6 Internet Access

The City provides Internet access for employees, officials, and volunteers as a work-related resource.

13.6.1 Employees, elected officials, and volunteers, should not do anything with City Internet access resources that would be considered illegal or inappropriate. Viewing or downloading erotica, or other inappropriate sites, playing games, and running a private business are examples. The downloading of music, videos or other personal data from websites (examples: Napster, Bittorrent) is prohibited on City computers.

13.6.2 All existing laws and City of Great Falls policies apply to conduct on the Internet, especially those that deal with property protection, privacy, misuse of City resources, sexual harassment, data security and confidentiality.

13.7 E-mail Use

Electronic mail (e-mail) is a quick and readily available tool for communication. The City provides this communication tool to its employees to enhance productivity. This policy refers to all e-mail software and messages that are used by any City-owned computer.

13.7.1 E-mail may be public record as defined by MCA §2-6-202. Public records are subject to discovery, subpoena, and use in litigation as other records of the City. Therefore, e-mail must be managed and publicly accessible like any other public record.

13.7.2 **All** data and messages created, received, transferred to or from, or maintained on any City computer are property of the City.

13.7.3 All existing laws and City policies apply to conduct with e-mail, including data security, property protection, privacy, resource misuse, confidentiality, and sexual harassment.

13.7.4 **Keep personal e-mail to a minimum. Incidental, occasional and appropriate** personal use of e-mail is permitted. Appropriate personal use does not impede City business, interfere with work performance of the user or others, include commercial use, or result in personal financial gain for the user. **Do not abuse this privilege.**

The City does **not** permit creating or forwarding “chain letters”. The City does not condone, and strongly discourages forwarding “jokes”. Any and all communications, including “jokes” that contain inappropriate/questionable material is strictly prohibited.

13.7.5 Most e-mail messages are subject to the Great Falls Records Retention Schedule. For retention periods, please check with the City Clerk.

13.7.6 E-mail users should be aware that, more than other communications media, e-mail facilitates the forwarding, copying and manipulation of messages beyond the creator’s control.

13.7.7 Each user is responsible for administering their individual mailbox, including checking e-mail at least daily, responding to e-mail promptly, and learning how to effectively use the software of the current e-mail system.

13.8 E-mail Etiquette

13.8.1 *Proofread*

Take time to proofread your messages for spelling and grammar mistakes.

13.8.2 *Be Aware of Differences Across e-mail Systems*

Employees should avoid features such as bold, underline, special fonts, or stationary as people receiving e-mail may have different features or capabilities.

13.8.3 *Identify Yourself*

If you are acting on behalf of the City, identify yourself with name, title and department. Include your e-mail address in the message and any attachments to it.

13.8.4 Don't be Hasty

If a message or posting generates negative feelings, set it aside and re-read it later. Consider that a misunderstanding or misinterpretation might occur. When in doubt, don't send the email.

13.8.5 Avoid Putting Text in all Capital Letters

Text in all capitals appears ANGRY or HARSH. Only use all capitals when adding extra emphasis.

13.8.6 Be Careful What You Say About Yourself and Others

Avoid committing anything to an e-mail message that should not become public knowledge. Exercise discretion when addressing sensitive information via email, such as personnel, legal or other potentially confidential or private matters. Be wary of including personal information about yourself or others in messages. E-mail messages are archived and retained for a period of time that is determined by the City Clerk.

13.8.7 Try to Keep Messages to a Single Subject; Use Subject Line Entries

The subject line of an e-mail message enables people to discern the subject of a message, its urgency, indexes the message, and identifies messages as "records." Appropriately identify confidential communications in the subject line.

Be aware that oftentimes direct communication is preferable than email as email cannot replace necessary interpersonal interaction needed to address complex work matters.

13.8.8 Do not Send Large Attachments without Prior Permission from the Recipient

Before sending large attachments, ask the recipient if they have time to receive them or indeed want them.

13.9 Internet and E-mail Monitoring

13.9.1 The City has software and systems in place that can filter and/or monitor and record Internet usage. The City has the capability of filtering and recording World Wide Web site visits (hits), chat sessions, newsgroup or e-mail messages, and file transfers that occur on the City network, and it reserves the right to do so at any time (Title 18 United States Code, Chapter 121, Sections 2710-2711).

13.9.2 Preparing and providing reports of Internet usage

The I.T. staff may periodically run reports of all internet usage on government computers. These include employee names, workstations ID's, dates and times of internet activity and a list of visited websites. Reports can be generated for management upon request.

13.9.3 Responsibility of the Department

The I.T. Division will not assume the responsibility of monitoring and/or taking action to ensure compliance with this policy. The employee's division and/or

department is ultimately responsible for managing computer usage, including internet **and e-mail** usage.

13.10 Remote access to City's Network

In today's workplace, it is common practice to provide employees the ability to work from remote locations (home, hotel, etc.). Remote access may be granted to employees with a **critical need** to access City computer resources from any host. Depending on need, this access may be granted on a temporary or permanent basis. The policies within this section are designed to minimize the potential exposure to the City from damages which may result from unauthorized use. Potential damages include the loss of sensitive or confidential data, intellectual property, damage to public image, damage to critical city internal systems (computers, network, mainframe, etc.). Failure to adhere to these policies may result in discipline, up to and including termination.

13.10.1 The Remote Host becomes your Work Computer

Section 13 applies to all employees who access the City network from any host and employees must adhere to Section 13. Access to the network is granted for the reason of conducting city business, not personal business or recreation, or any other business precluded by City policies.

13.10.2 The Right to Deny Access

I.T. reserves the right to reject and/or terminate remote access at any time.

13.10.3 The Ability to Work Remotely

Any employee requesting remote access will need Department Head and I.T. Staff approval.

This policy applies to employees, including laid off or terminated employees (for this section 14, included in the term “employees”), except where there are differing procedures set forth in an applicable Collective Bargaining Agreement. The Employee Assistance Program is available to all employees as an additional option for problem resolution. Contact HR for further details.

14.1 Problem Resolution Policy and Counseling

Normally, an employee will be expected to use the Employee Problem Resolution Procedure to resolve a problem. However, if the problem or complaint is of a personal nature, or a very delicate matter, the employee may first meet with any member of management, including the City Manager, to discuss it. If the complaint, suggestion, or question is of such a nature that resolution would be hampered by the Employee Problem Resolution Procedure, then management will take appropriate action. If management determines that the employee should first discuss the problem with an immediate supervisor, the employee will be directed to use the Employee Problem Resolution Procedure.

14.2 Employee Problem Resolution Procedure

Employees are responsible for seeking information or advice on any matter that is troubling them, to call attention to management any action that they believe is inconsistent with these policies or procedures or to grieve, or object to, management action. The City's policy is to attempt to resolve job-related problems whenever possible through informal discussions between employees, their immediate supervisors and/or managers. Members of Collective Bargaining Agreements should refer to their respective agreements for additional or other applicable resolution procedures.

Employees who have made an attempt to correct a problem through informal discussions and believe the problem has not been resolved must file a written complaint using the formal procedure described below. Probationary employees are not eligible to use this procedure unless they are alleging unlawful acts on the part of management. Terminated employees must follow this procedure prior to taking any further action related to their termination. A copy of this policy must be provided to any employee within seven days of discharge.

Note: Some of the time frames established in this procedure may be extended upon written mutual agreement of the parties. Unless otherwise noted, the term "day" as used in this policy refers to work days, Monday through Friday, which are not observed as holidays by the City of Great Falls. The grieving party carries the burden of moving the grievance forward within the time period specified. Failure on the part of the grieving party to advance the grievance to the next step of the procedure within the allotted time frame may result in dismissal of the grievance.

14.2.1 Step One

Submit the complaint in writing to an immediate supervisor within 10 calendar days after the alleged incident(s). In the written document, employees should describe the complaint and indicate what action(s) they believe the City of Great Falls should take to resolve the complaint. The supervisor will then have 10 calendar days to investigate the alleged incident(s) as necessary and respond to the employee's written complaint.

If the employee is a Department Head, that complaint must advance directly to step three, set forth below, as that employee's immediate supervisor is the City Manager.

14.2.2 Step Two

Employees must notify management in writing of their desire to proceed to step two of the procedure within five calendar days of the date the response was provided, was due, or if the immediate supervisor is directly involved in the complaint. Submit the complaint along with supporting materials and a copy of the response received in Step One, if any, to Human Resources (HR). HR or its designee may interview those involved in the dispute and may conduct any investigation HR believes is necessary to render an appropriate decision.

HR has 30 calendar days from the date of the written complaint in step two to issue a decision. If HR is the subject of a complaint or if the department's ability to render an impartial decision is in question, the City Manager may appoint another person to review the complaint and issue a decision.

14.2.3 Step Three

Employees who are not satisfied with the decision rendered on their complaint in step two may appeal an issue if it involves **demotion, suspension, or discharge**. Appeals are made to the City Manager within five calendar days after the date of the decision.

The City Manager may, within 15 calendar days of the appeal, (or in the case of Department Heads, the grievance) either appoint a committee to collect additional information to hear the grievance, or may schedule time to personally hear the complaint and render a final and binding decision.

The goal of a City employee is to serve the public; follow rules and regulations on work performance and personal conduct; work well with co-workers, supervisors and the public; and do all the other things that contribute to good job performance and reaching City goals. When employee behavior departs from the standards set by the City, the need for disciplinary action arises.

15.1 Discipline Defined

Discipline is training that corrects, molds, or perfects behavior towards an orderly or prescribed conduct. Discipline should be viewed as corrective rather than punitive. The City generally applies a series of disciplinary actions, graduating in degree, based on the initial severity or on repetition of the problem behavior.

15.2 Good Cause for Discipline

The basic rule is that there must be **good cause** for imposing discipline. Good cause is defined in MCA §39-2-903 as reasonable job-related grounds for action based on a failure to satisfactorily perform job duties, disruption of the employer's operation, or other legitimate business reasons. The City must demonstrate and practice good faith when exercising discipline.

15.3 Disciplinary Responsibilities

HR is responsible for distributing this Personnel Policy Manual to all employees. Employees are responsible for reading and familiarizing themselves with this Manual. Supervisors are responsible for informing their employees of work rules and work performance standards particular to their department and that may not be included in this Manual. When an employee does not follow these rules or standards, a supervisor should use the Disciplinary Procedure to correct such behavior.

15.4 Discipline Steps

Management will generally follow these procedures when taking disciplinary action. However, depending on the severity or nature of the offense, management, in its discretion, reserves the right to skip one or more of these discipline steps. Management will determine the first step in the disciplinary process. When deciding how to initiate discipline, consideration will be given to such factors as the seriousness of the offense, repetition of the problem, behavior, or offense, and prior employment record. Management will conduct investigations that include the employee in question's input before making determinations as to formal discipline.

15.4.1 Informal Disciplinary Actions

a. Corrective Counseling

Corrective counseling is a constructive step taken to improve unsatisfactory behavior. The key component is a meeting during which the supervisor and the employee agree on the nature of the problem and the steps necessary to correct the problem. Success results from positive, non-threatening counseling and communicating that the employee is responsible for the problem and its resolution. These steps can be useful to both the employee and the supervisor during informal counseling for conduct or performance problems:

- State the purpose. Get to the point.

- Describe the specific behavior problem. Cite the rule, policy or standard that has been violated, and the reasoning behind the rule or policy.
- Listen. Both the supervisor and employee should be active in this evaluation. Listening allows the other person to understand.
- Pinpoint any evidence showing the employee is responsible for the problem. Determine the cause(s) of the problem. Remain objective—the goal is to resolve the issue.
- The employee should offer remedies to the problem. Mutually develop an action plan to correct the problem.
- The employee should provide an overview of the discussion and the solution, in order to ensure both parties are in agreement.
- Schedule a follow-up meeting, as appropriate, to review the progress of the employee's behavior.
- At the conclusion of the meeting, document the employee's name, the date and time of the meeting, the problem, the agreed solution, and the date of the follow-up meeting, if any.

b. Oral Warning

Oral warnings are those given to an employee verbally, as opposed to in writing. Supervisors are responsible for keeping a record of all oral warnings; it is advisable that employees do the same. The record should contain:

- The employee's name;
- The date and time of the oral warning;
- Date, time and location of the incident or problem resulting in discipline;
- Names of others involved, either as witnesses or participants;
- An objective, factual description of the employee's behavior, specific to the incident or problem resulting in discipline;
- An accurate summary of the oral warning given to the employee, including the employee's statement in defense of their behavior, if any; and
- Any other documentation available such as letters of complaint from other departments, employees, supervisors, or the public; examples of the employee's work if related to the behavior in question; and memos that outline the results of corrective counseling.

15.4.2 Formal Disciplinary Actions

a. Written Warning

A written warning is normally the third step in the disciplinary process and the first formal disciplinary action. Critical elements to be included in the written warning are:

- The good cause (reasons) for the disciplinary action;

- A description of the disciplinary action, including dates and duration, if applicable;
- The improvements or corrections expected of the employee;
- Consequences (further discipline) if the employee fails to improve or correct behavior within a specified period of time; and
- The employee's signature and/or receipt of the warning.

The written warning must be presented to the employee for review and signature. If the employee subject to discipline refuses to sign the warning, a witness to the refusal must sign the notice in the presence of the supervisor and the disciplined employee. In addition to grievance rights, the employee has the right to respond to the notice either verbally, in writing, or both. Any written response must be attached to the notice and included in the employee's personnel file.

b. Suspension With or Without Pay

Suspension without pay is an unpaid leave of absence ordered by management. If a written warning is given and fails to produce the desired change in behavior, the supervisor may impose a suspension. Some infractions may warrant a suspension on the first occurrence. Examples of such infractions may include, but are not limited to sexual harassment, physical fighting on the job, violence or threats of violence, and/or insubordination.

A suspension may be imposed in either of the following ways:

- In writing and given to the employee in a disciplinary meeting; the notice should include a copy of the employee's appeal or grievance process; or
- Immediately and orally at the time of the infraction (followed in writing, with copy of the employee's appeal or grievance process attached, if the suspension is without pay).

Immediate suspensions are used in situations where it is necessary to remove the employee immediately from the work environment and/or when time to conduct an investigation of the situation to determine the appropriate course of action.

c. Discharge

Discharge means employment is terminated for good cause. Discharge is appropriate when prior disciplinary actions have failed to resolve unacceptable conduct, or there is a performance problem that directly affects department operations. Some infractions may warrant discharge on the first occurrence, therefore, the City reserves the right to discharge an employee without prior disciplinary action pending an investigation.

All instances of discharge will be in writing. The discharge should contain a statement of good cause for the action, relevant documentation, and notice of the appeal or grievance process.

- 15.5 All employees must follow the Problem Solving and Grievance Procedures set forth in Section 14 if they object to any of the disciplinary policy steps taken in this Section 15.

16.1 Expense Reimbursement

Employees need authorization (requisition/purchase order, etc.) prior to incurring an expense on behalf of the City. To be reimbursed for all authorized expenses, including fuel purchased by employees for City vehicles, employees must submit an expense report/voucher accompanied by required receipts. A supervisor must approve the expense report/voucher prior to submittal. Generally, claims will not be paid without proper documentation. Contact your supervisor or the Fiscal Services Director for additional information.

16.1.1 Reimbursement Claim Documentation Required

Depending on the amount claimed, receipts must support reimbursement claims. Support can include receipts for individual meals (if the base allowance is exceeded), transportation (plane, train, rental car, etc.), lodging, enrollment and registration, and miscellaneous business expenses.

16.1.2 Documentation Exemptions

There are occasions when receipts are not required. These include instances when individual meal claims fall within the base allowance, personal transportation claims fall within the rate per mile, and for costs associated with incidental miscellaneous expenses where receipts are not normally available (pay phones, taxis, parking, etc.).

16.1.3 Lost Receipts

Employees who have lost a receipt but know the amount or approximate amount of an expense may submit their claim as usual and note the receipt loss in a brief, written explanation. The City then may reimburse the employee if the expense and explanation are reasonable.

16.2 Meal Reimbursement

The base allowance provided for a meal is considered a realistic reimbursement rate. Meals at or below the base rate do not require receipt documentation, as outlined above.

16.2.1 Standard Meal Allowance

The standard meal allowance for both in-state and out-of-state City travel is established by policy. Alcohol expenses will not be reimbursed or paid. Contact Fiscal Services for current amounts.

16.2.2 Explanation of Standard Meal Allowance

The meal allowance is not a daily allowance or limit; it is an allowance or limit per meal, including any tip. Employees departing after 7:00 a.m. and returning before 7:00 p.m. qualify for the lunch allowance only. Employees departing after 7:00 a.m. and returning after 7:00 p.m. qualify for both the lunch and dinner allowances. Employees departing before 7:00 a.m. and returning after 7:00 p.m. qualify for the breakfast, lunch and dinner allowances.

16.2.3 Special Meal Circumstances

If a meal is not associated with a business meeting, or if a meal exceeds the standard meal allowance, the meal may qualify under special meal circumstances. The City understands that some locations are, by their nature, more expensive. Employees in locations such as these may exceed individual meal allowances. Any extra costs may

be claimed. Employees should attach a receipt and a brief, written explanation to their claim form for each meal. The request for additional meal expense coverage will be subject to the claim approval process.

16.3 Transportation Reimbursement

16.3.1 Personal Vehicle Travel Allowance

The travel allowance for use of a personal vehicle is at a rate equal to the mileage allotment allowed by the United States Internal Revenue Service. Fiscal Services will notify Departments each year what the rate is and what date the rate will be effective. This reimbursement covers all vehicle-related expenses such as gas, oil, maintenance, insurance, etc. When employees share personal transportation, only the employee providing the personal vehicle is eligible for reimbursement. (See MCA §2-18-503(3).) Unless otherwise approved by the supervisor, if an employee uses a personal vehicle when a City vehicle is available to that employee for such use, the employee will only be reimbursed for fuel costs. On extended trips, if an employee chooses to travel which is more expensive than an alternative mode of travel, the employee will only be reimbursed the lesser cost. For example, if an employee chooses to travel in a personal vehicle, where the mileage/fuel costs are greater than the airfare, the employee will only be reimbursed the amount of the round trip airfare costs for the trip.

16.3.2 Travel Allowance Conflict with Monthly Car Allowance

Employees who receive a monthly car allowance from the City are only eligible for the per mile rate when travel takes them beyond a 10-mile radius from the City limits. For extended travel, the total trip mileage is reimbursable at the per mile rate.

16.3.3 Public Transportation

Public transportation for City purposes shall be limited to coach rates, unless special circumstances exist and are documented. Actual fares paid for air transportation, not to exceed coach rates, will be reimbursed with appropriate receipts. The cost of one checked bag will be reimbursed. All fares should be billed to the City, if possible. Advance planning should be used to take advantage of airline special rates. When airfare rates are considerably less by leaving a day earlier or by staying a day later, the City will pay the extra day's meals and lodging (the savings must be at least the cost of the extra lodging and meal costs).

16.3.4 Travel Cost Trade-off

Employees should try to reduce overall business travel costs. The timing of travel can result in savings associated with taking advantage of special rates. Accordingly, the City may choose to pay additional lodging, meals, etc. if the result is a net savings.

16.3.5 Car Rental

Rental of vehicles is not an allowable expenditure, except with prior written approval of the Department Head. All costs of rental vehicles should be determined in advance of travel. An explanation for the necessity of a rental car will be included on the Travel Advance/Reimbursement Request Form.

16.3.6 Travel Forms

All travel should have a Travel Advance/Reimbursement Request Form filled out and approved by the Department Head and City Manager's office prior to the

employee's travel. All out of state travel arrangements must be approved by the Department Head and City Manager's office prior to being made.

16.4 Other Business Expense Reimbursement

16.4.1 Lodging

The City has not established cost parameters for lodging. Employees should select reasonably located and priced lodging, considering the business purpose. Employees are responsible for room deposits and lodging payments, unless advance payment is processed. In order to pay a lodging facility directly, payment must be processed in advance through normal claim procedures. If an employee is accompanied by a non-employee, the lodging invoice must bear a notation, signed by an authorized representative of the lodging facility as to the single room rate. The employee is responsible for the difference between the single and rate charged.

16.4.2 Registration and Fees

Fees for schools, seminars, and other events requiring advance payment should be paid by through the City's normal claim procedure (plan ahead for timely payment).

16.5 Travel Advance

Employees can and are encouraged to receive advance payment for known travel expenses (such as meal allowance, lodging, and fees) and submit the Travel Requisition form to Fiscal Services at least ten days before the travel date. Advances require normal claim processing. If adequate time is not provided for processing, the request may be rejected. Employees must immediately return advanced expenses to the City for all cancelled travel.

16.6 Travel Requisition Form

The Preparation of the Travel Requisition form should be submitted to the City Manager *at least ten calendar days* in advance of the travel date. An itemized description of actual expenses should be completed and returned to Fiscal Services *within five calendar days* after return from travel.

16.7 Coordinated Personal Travel

There are benefits associated with coordinating business travel with personal travel, especially when it results in cost savings for the City. Extending a personal trip into a business trip, or taking personal time after completing the business portion of a trip often results in lower travel costs for the City.

APPENDIX

Harassment Complaint and Authorization to Investigate

Name: _____ Date: _____

STATEMENT OF COMPLAINT

(Be specific. Read the Harassment policy before completing.)

Date of incident(s): _____

Name(s) of person(s) accused of wrongdoing: _____

Name(s) of witness(es): _____

Description of incident: _____
(Describe in your own words the actions of all involved, including yourself.)

Use back of form, or attach additional pages if more space is needed

Action requested:

I understand that Human Resources, the City Attorney, Police Chief and/or a chosen representative will be conducting an investigation of my complaint. A report of harassment, its investigation, the outcome of the investigation, and any action(s) taken relating to a specific employee is confidential unless prohibited by law or subject to court ordered dissemination. Dissemination of confidential information shall be limited to persons with a need to know in order to conduct an investigation.

I hereby authorize Human Resources, the City Attorney, Police Chief and/or chosen representative to discuss this complaint with other persons on a need to know basis to conduct an investigation.

I acknowledge that I have read and understand the above statements.

Employee: _____ *(Signature)* Date: _____

Submitted to: _____

Human Resources: _____ *(Signature)* Date Received: _____

Police Chief: _____ *(Signature)* Date Received: _____

Unpaid Leave of Absence Request Form

Name: _____ Date: _____

Department: _____

Dates of Requested Absence from Work:

Date Leave is Requested to Begin: _____

Date Employee Agrees to Return to Work: _____

Reason for Requesting Leave of Absence from Work: _____

Employee Signature

Factors that will be considered in the approval/denial process will include items such as:

- A cost/benefit analysis, which weighs both direct and indirect costs against benefits to the employee and City.

Costs considered will include:

- ☞ Loss of productivity
- ☞ Overtime or compensatory time for other current employees
- ☞ Hiring and training a temporary replacement
- ☞ Impact on the budget

Benefits considered will include:

- ☞ Long-term retention of employee
- ☞ Improved job performance as a result of the requested leave
- ☞ An overall savings to the City as a result of the requested leave

Department Head Approval: _____

City Manager Approval: _____

Tuition Reimbursement Authorization and Contract

I, _____, hereby acknowledge that I am in receipt of \$ _____ from the City of Great Falls as reimbursement for tuition to attend _____ class that I am taking during the _____ semester/quarter. (Receipts attached.)

-OR-

I, _____, have requested direct payment in the amount of \$ _____ payable to _____ to attend _____ class that I am taking during the _____ semester/quarter.

I am aware of the requirement that I maintain a letter grade of "C" or the equivalent. If I fail to attain a letter grade "C" or the equivalent, I authorize the City of Great Falls to deduct the amount listed above from my payroll check in equal amounts over a period of not more than four months, or eight pay periods.

Dated this _____ day of _____, 20_____.

Employee Signature

Department Head Signature

Print Employee Name

City Manager Signature

*Receipt and Acknowledgment of
City of Great Falls
Personnel Policy Manual*

This Personnel Policy Manual is an important document intended to help employees become acquainted with the City of Great Falls. This Manual should serve as a guide; it is not the final word in all cases. Individual circumstances may call for individual attention.

Please read the following statements and sign below to indicate receipt and acknowledgment of the City of Great Falls Personnel Policy Manual.

1. I have received and read a copy of the City of Great Falls Personnel Policy Manual. I understand that the policies, rules, and benefits described therein are subject to change at the sole discretion of the City of Great Falls at any time. I understand that this Manual replaces (supersedes) all previous employment materials.
2. I understand that this Manual expresses no contract of employment, real or implied. I may willingly resign my position at any time during my employment. Conversely, the City of Great Falls may terminate my employment at any time, within the guidelines of this Manual, City Charter, and Montana law.
3. I understand that, should the content of the City of Great Falls Personnel Policy Manual be changed in any way, I may be required to provide an additional signature to indicate that I am aware of and understand any new or updated policies.
4. I understand that my signature below indicates that I have read and understand the above statements and have received a copy of the City of Great Falls Personnel Policy Manual.

Employee's Printed Name

Position

Employee's Signature

Date

Last 4 of SS number

Supervisor's Signature

Date



Library Board Meeting Date: June 25, 2024

**GREAT FALLS PUBLIC LIBRARY
BOARD AGENDA REPORT**

Item:	Evaluation of Library Director
Presented By:	Susie McIntyre, Library Director
Action Requested:	Conduct evaluation of Library Director

Suggested Motion:

1. Trustee moves:
...that the Great Falls Public Library Board of Trustees approve/disapprove the annual performance review of the Library Director.
 2. Chair requests a second to the motion, public comment, Board discussion, and calls for the vote.
-

Staff Recommendation: Staff recommends that the Library Board conduct the annual review of the Library Director.

Background: According to MCA 22-1-310, “The board of trustees of each library shall appoint and set the compensation of the chief librarian who shall serve as the secretary of the board and shall serve at the pleasure of the board. With the recommendation of the chief librarian, the board shall employ and discharge such other persons as may be necessary in the administration of the affairs of the library, fix and pay their salaries and compensation, and prescribe their duties.” It is generally considered best practice to provide regular feedback and evaluations to all staff. Previously, the Library Board has approved a yearly Board meeting task calendar. As part of that calendar, the Board has elected to evaluate the performance of the Library Director yearly at their June meeting.

Significant Impacts: Feedback and evaluation of the Library Director will help the Library Director understand the expectations of the Board and allow her to improve on her strengths and address her challenges.

Fiscal Impact: There is no direct fiscal impact to the Library if the Board does or does not plan to evaluate the Director.

Alternatives: The Board could decide not to evaluate the Library Director this year.

Attachments/Exhibits:

None

Director's Itinerary: May 2024

Weds.	May	1	City/Library Renegotiation Meeting 8:00 am MontanaLibrary2Go Membership Meeting 11:00 am Communication Meeting 3:00 pm
Thurs.	May	2	Pathfinder Meeting (Fort Benton)
Fri	May	3	Public Services Meeting 9:00 am Community Cleanup Team at Library 10:00 am
Sat	May	4	AAUW Spring Luncheon 10:30 am
Mon	May	6	Local Area Council on Mental Health 1:30 pm
Tues.	May	7	Management Team Meeting 9:00 am Foundation Director Meeting 1:30 pm City Commission Work Session 5:30 pm City Commission Meeting 7:00 pm
Weds.	May	8	Continuum of Care Meeting 9:00 am Staff Supervision Meeting 11:00 am Planning meeting for Digital Born News Work Group 1 st meeting 1:00 pm Staff Supervision Meeting 2:00 pm Communication Meeting 3:00 pm Youth Services website meeting 4:00 pm
Thurs.	May	9	Juneteenth Planning meeting 8:00 am Digital Born News Work Group 10:00 am to 12:00 noon Cushing Terrell Remodel meeting 3:00 pm Sober Life Book Club 6:00 pm
Fri	May	10	New staff safety tour 9:00 am
Sat.	May	11	Manager-on-duty
Mon.	May	13	City of Great Falls Employee Book club 12:00 pm
Tues.	May	14	Paris Gibson Committee 7:30 am Management Team Meeting 9:00 am Department Head Meeting 10:00 am Rotary Meeting 12:00 pm Custodial Staff Meeting 1:30 pm
Weds.	May	15	Access to Health Care Meeting: 12:30 pm Communication Meeting 3:00 pm Staff supervision meeting 5:00 pm
Thurs.	May	16	Vacation
Fri	May	17	Vacation
Sat.	May	18	Vacation
Tues.	May	21	Management Team Meeting 9:00 am City Manager monthly one-on-one meeting 10:00 am Rotary Meeting 12:00 pm Foundation Director Meeting 1:30 pm Custodial Staff Meeting 3:00 pm Commission Work Session 5:30 pm City Commission Meeting 7:00 pm
Weds.	May	22	Communication Meeting 3:00 pm Admin prep meeting 3:00 pm Staff supervision meeting 4:00 pm Manager on Duty 6:00 pm – 8:00 pm
Thurs.	May	23	Juneteenth Planning Meeting 8:00 am LinkedIn Learning Training for Planning & Community Dev. 10:00 am Staff supervision meeting 1:00 pm Tech training conversation 2:00 pm Library Night at the Voyagers
Fri	May	24	Library Fire Drill 11:00 am Eagle Scout consultation 3:00 pm
Sat	May	25	Manager-on-duty
Mon.	May	27	Memorial Day: Library Closed

Tues.	May	28	Management Team Meeting 9:00 am Department Head Meeting 10:00 am HR Consult Library Hate Incident 11:00 pm Rotary Meeting 12:00 pm Foundation Director Meeting 1:30 pm GFPL website launch meeting 2:30 pm Board Meeting 4:30pm Page Forward Tuesday Book Club 7:00 pm
Weds	May	29	Foundation Consultant Remodel Vision meeting 10:30 am – 11:00 pm Renegotiation Committee meeting 10:00 am Staff Supervision Meeting 12:30 pm Website transition meeting 1:30 pm
Thurs	May	30	AAUW Lease meeting 10:30 am Staff Supervision Meeting 2:00 pm
Fri	May	31	Public Services Meeting 9:00 am Board Chair meeting 10:00 am Communication Meeting 1:00 pm

Next Library Board Meeting is July 23, 2024 4:30 pm

MANAGEMENT TEAM MEETING

Meeting Minutes

May 7, 2024

Present: Sarah Cawley, Treva Higgins, Sara Kegel, Aaron Kueffler, Sara Linder-Parkinson, Rae McFadden, Susie McIntyre, Bob Miller, Jake Sorich

Absent:

Next Meeting: May 14, 2024; 9:00am; Montana Room

SUSIE

- A discussion was had on the Dress Code policy.
- Susie is working on Evaluations; Managers need to get theirs done this month.
- A reminder that Paris Gibson Month is in July.
- A discussion was had on patron behavior.
- Susie will be attending Rotary today.
- There is a commission meeting this evening.
- Negotiations are in the beginning stages for Management agreement.
- Susie will be out of the office May 16-20. She needs board packet information as soon as possible.
- Susie gave an update on the band shell.
- A reminder that if any staff from the Law Clinic asks library staff to do something for them, please direct them to Susie.

TREVA

- Treva informed us that she has found two more Paris Gibson books.
- Genealogy Society is going through the flat files in the annex.
- Isa is out today.

SARA LP

- Sara informed us that there will be no public services meeting this Friday.
- Sara will be out of the office May 15-24; back on the 28th. She will also be out on May 31st.
- Trevor will be out this week and back in the office next Wednesday.
- Sara is working with the Pre-Release center to sign up people for library cards so they can use the library online services like Libby, LinkedIn Learning, Etc.

SARA K

- Sara informed us that Sarah C's phone has been moved to her new office.
- Payten will begin working Tuesday-Saturday; 8am-4:30pm this week.
- Sara will be attending the mental health training on Friday; Payten will be attending on Thursday.
- Sara is working on staff trainings based on the survey that she sent out.

AARON

- Aaron reminded everyone that timesheets are due Thursday.

BOB

- Bob informed us that the small drinking fountain in the lobby is not working. He has placed an out of order sign on it. On May 13th he will shut off the main water supply in the early morning so he can make a repair on it. He should have it completed and the water back on before we open to the public.

RAE

- Zander will be attending the Mental Health training on Thursday; Drew will attend on Friday.
- Rae will be working 11a-8p on Thursday.
- A group of 20 (4-5 year olds) will be in at 9:30 on Wednesday.

SARAH C

- Sarah thanked everyone that helped move her into her new office.
- Jewish Heritage evening is tonight.
- Sarah will be in and out of the office all week.
- Spots are still available for the Mental Health training this week.

JAKE

- Jake is working on updating the logo on forms.
- A discussion was had on doing a video with John and Lukas.

MANAGEMENT TEAM MEETING

Meeting Minutes

May 14, 2024

Present: Sarah Cawley, Treva Higgins, Sara Kegel, Aaron Kueffler, Sara Linder-Parkinson, Susie McIntyre, Bob Miller, Jake Sorich

Absent: Rae McFadden

Next Meeting: May 21, 2024; 9:00am; Montana Room

SUSIE

- Susie informed us that the Montana State Library has a new ticket system.
- A discussion was had regarding Wowbrary's eBook listings.
- The Website FAQ is completed.
- The Book Sale is going well
- Susie will be out of the office from May 16th-May 18th.
- Susie has a department head meeting today.

TREVA

- Treva's search for lost books from the Gibson's continues.

SARA LP

- Sara will be out of the office from May 15th through May 28th.
- Lukas and John are attending training this week.
- Amanda is working on Family Craft Kits. She will be devoting Friday to finishing them up.
- Sara has set up the different notices to go to different email addresses as needed.

SARA K

- Sara is working on issues with the Chrome books in Kids Place.
- Payten created a presentation on Cyber Security. She will email it to everyone. It was suggested that staff fill out a questionnaire after they view it.
- Sara and Payten are reviewing answers from the staff survey.
- For next week, Sara K will be manager on duty for Tuesday Night; Susie for Wednesday; and Treva on Thursday.

AARON

- Aaron had nothing to report.

BOB

- Bob informed us that the parts to repair the lobby drinking fountain have been ordered.
- Bob and John will start cleaning up the parking lot this week.

RAE

- Rae was not present.

SARAH C

- Sarah has been informed that the Little Free Library in Memorial Park has been damaged. The Little Free Library in Carter park has been vandalized.
- Book sale continues this week.
- The final Winter Speaker Series is this week.
- Jakes workshop has changed dates.
- Voyager tickets are available from the Foundation.

JAKE

- Jake is continuing to work on the logo implementation.
- Jake will be sending out the logo in a jpg format with instructions on setting up an email signature line. Susie indicated that all staff will be required to have this.
- Jake is working on the June events flyer.

MANAGEMENT TEAM MEETING

Meeting Minutes

May 21, 2024

Present: Sarah Cawley, Treva Higgins, Aaron Kueffler, Rae McFadden, Susie McIntyre, Bob Miller, Jake Sorich

Absent: Sara Kegel, Sara Linder-Parkinson

Next Meeting: May 28, 2024; 9:00am; Montana Room

SUSIE

- Susie has a discussion on the new logo.
- The Cyber Security Training is out. Please fill out the questionnaire and returning it to your supervisor.
- Susie has a commission meeting tonight.
- Board packet will be out today.
- A discussion was had regarding manager meetings and possibly moving them to Wednesdays.
- First Sunday open will be June 9th.

TREVA

- Treva will be attending a class on Thursday and Friday. She will be in on Friday afternoon.
- Deborah has 200 more books to look through; she is also out of the office this week.
- Treva will be out of the office next Friday.

SARA LP

- Sara was not present.

SARA K

- Sara was not present.

AARON

- Due to the upcoming software upgrade at the city, time sheets are due today so they can be entered in before the site goes down.

BOB

- Bob got the plants planted in the front of the library.

RAE

- Rae informed us that Summer Reading was coming up.
- Nikki & Drew will be at the JDC today signing up for loot boxes.
- Rae will be moving the Friday KP/YA meeting to the small meeting room going forward.

SARAH C

- Sarah informed us that she will be contacting non-profits to come and look at the books remaining from the book sale.
- Summer reading party, as well as the summer bash, is coming up. A lot of things are being planned.

JAKE

- Jake informed us the Friends of the Library book sale is over. They will have an after sale next Tuesday (28th) from 12p-6p. AAUW will begin collection their books on June 11th.
- Jake will be ordering business cards with the new logo for those that need them.
- Voyager baseball game is Thursday.

MANAGEMENT TEAM MEETING

Meeting Minutes

May 28, 2024

Present: Sarah Cawley, Treva Higgins, Aaron Kueffler, Sara Linder-Parkinson, Susie McIntyre, Bob Miller, Jake Sorich, Payten Zenahlik

Absent: Sara Kegel, Rae McFadden

Next Meeting: June 4, 2024; 9:00am; Montana Room

SUSIE

- Susie led a discussion on changing the management meeting to Wednesdays. This will begin on June 12th. A decision on starting at 9am or 10am still needs to be decided.
- Susie informed us that a librarian from CMR passed away.
- Six applications were received for the Library Board. The Commission will interview on the 12th, and make an appointment to the board at the following commission meeting.
- Board meeting is tonight.
- Susie presented LinkedIn Learning to the City Planning and Development department managers.
- A swastika made of Zip Ties was found in the book drop bin. John R. looked at the video and found 3 youths putting it in. We will be sending the footage to the police department.
- A discussion was had regarding adding more walkie-talkies around the building.
- Fire drill went well.
- The next FAP ask will be in September. Please have proposals, including pricing, to Susie by August 2nd.
- A discussion was had regarding the OPAC interface.

TREVA

- Treva is wrapping up end of fiscal year stuff.
- Treva had questions about the logo.

SARA LP

- Sara led a discussion on the required new logo email signature blocks. They will not be required until June 7th.
- Sara is back from vacation. She has noticed that several of her staff had been in and out during the week. She will be working on a list so time sheets can be adjusted the next cycle.
- Sara will be out of the office this Friday.

PAYTEN

- Sara is out of the office.
- Payten discussed the issues that some printers are having regarding the new font that is used in the logo.
- Susie added that the font is to be used for anything that is “promotional” if you are just writing a letter, you do not need to use the font.

AARON

- Aaron had nothing to report.

BOB

- Bob and John are working on cleaning up the park area.
- Cascade Electric should be in today or tomorrow to install power back in the park.

RAE

- Rae was not present.

SARAH C

- Sarah informed us that Leadership HS was in this morning.
- Sarah will be giving the new Chamber Director a tour of the library today.
- Book Club lists are done for the next year.
- The Library Summer Bash is on June 8th. Food vendors and music will be here, as well as community partner booths. Sarah hopes to have everything cleaned up and put away by 6:45pm
- A dumpster will be here tomorrow for the unsold book sale books.

JAKE

- Jake is working on the new website. He will be adding the new logo on the 6th.
- A discussion was had regarding Staff Picks.
- Jake passed out book mark samples with the new logo on them.

Great Falls Public Library July 2024 Events

Art in the Library – Robert Fineman

When: Through the month of July

Where: Great Falls Public Library, 1st and 2nd Floor

What: Local artist Robert Fineman will be displaying works in the Library through July and August.



Memory Café

When: Tuesday, July 2, 12:30 to 2 pm

Where: Paris Gibson Square Museum of Art

What: Join us at Paris Gibson Square for a tour of the museum and a look at all of the new art exhibits on display this summer!

Little Shell Tribal Health Medicaid sign-ups

When: Wednesday July 3, 10, 17, 24, 31 from 10 am to 2 pm

Where: First Floor Display area

What: Have you recently lost your Medicaid coverage? Do you know if you can re-apply or if you could be losing coverage? A Little Shell Tribal Health Care Worker will be at the library to provide help to determine if you can re-apply for coverage, or sign up to get a plan on the Health Insurance Marketplace.



Sean Gaskell West African harp performance

When: Wednesday, July 11, 7 to 8 pm

Where: Library Park

What: Sean Gaskell performs songs on the kora - a 21 stringed West African harp. He studied under the extensive instruction of Moriba Kuyateh and the late Malamini Jobarteh in Gambia, and both Youssoupha Cissokho and Mamadou Cissokho in Senegal. The kora is traditionally played by oral historians known as Griots. Many songs featured on the kora preserve an 800-year history dating back to the founding of the Mande empire. Gaskell has presented adult, youth and family programs at over 350 libraries and a multitude of k-12 schools, colleges, universities and assisted living facilities throughout the United States and Canada.



Great Falls Public Library | 301 2nd Ave. N | Great Falls, MT | 59401 | 406-453-0349 | www.greatfallslibrary.org

Great Falls Public Library July 2024 Events



Closed for 4th of July

When: July 4 all day

What: The Great Falls Public Library is closed for Independence Day on Thursday, July 4 but will re-open on July 5 at 9 am.

Emergency Services' Mobile Integrated Healthcare

When: July 12 and 26, 2 to 3 pm

Where: First Floor Display area

What: Great Falls Emergency Services, as part of the Mobile Integrated Healthcare Program, will be at the first-floor display table to offer blood pressure checks, pulse oximetry checks, blood glucose checks, medical referrals, medication checks and will answer other medical questions as needed.



Weekly Open Tech Sessions

When: Thursday, July 11, 18, 25 from 1 to 3 pm

Where: Small Conference Room downstairs

What: The Great Falls Public Library is hosting Open Tech Sessions every Thursday to assist you with all your technology needs and questions. Whether it's setting up your new smartphone, troubleshooting software issues, or navigating social media platforms, our friendly tech-savvy team is here to help! ****Please note:**** While we're eager to lend a hand, we are not a repair shop. We won't be able to physically repair devices, but we'll do our best to guide you through any digital challenges you may face.



AAUW Donation Days

When: Tuesday July 2 through Oct. 8 from 10 am to 2 pm

Where: Back entrance loading area

What: The AAUW Is taking donations for their upcoming booksale in October. They take used books, CDS, DVDs, games and puzzles in good condition. They do not accept textbooks, encyclopedias, magazines, Reader's Digest books, VHS tapes, cassette tapes, materials in poor condition, discarded library books.

Great Falls Public Library July 2024 Events

Summer Music in the Park for July

When: Tuesday July 9, 7 to 9 pm
Where: Library Park (North of Library)
What: Music from Pollo Loco

Pollo Loco



July 9
7 PM

When: Tuesday July 16, 7 to 9 pm
Where: Library Park (North of Library)
What: Music from Brandon Hale and the Dirty Shame

Brandon Hale and the Dirty Shame



July 16
7 PM

Supaman



July 23
7 PM

When: Tuesday July 23, 7 to 9 pm
Where: Library Park (North of Library)
What: Music from Supaman

Bring a chair or a blanket and enjoy these FREE performances in the Library Park. Select food vendors will be on site!! Thanks to our Sponsors:



tdsfiber.com

SCHEELS

Bravera Bank

First Interstate Bank

Montana Credit Union



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Great Falls Public Library July 2024 Events



GFPL Monthly Board of Trustees Meeting

When: Tuesday, July 23, 4:30 pm

Where: Cordingley Room

What: The Great Falls Public Library Board of Trustees meets for its monthly meeting to discuss items appearing on the board agenda available on our website or on the bulletin board in the library.

Montana Women Vote Voter Registration

When: July 10 and 31, Noon to 4 pm

Where: Display table on first floor

What: Montana Women Vote will be at the library every other Wednesday to register people to vote on the first floor near the front window display table. This service is free and open to anyone who is a resident of Great Falls.



July Book Clubs

The only thing better than reading a good book is talking about good books.



City Employee Book Club (Open to City of Great Falls employees)

When: July 8, Noon to 1 pm

Where: Small Meeting Room

What: Discussion of *Montana Noir* by various Montana authors



Silent Book Club at Luna Coffee, 3rd Saturday

When: July 20, 10 am to noon

Where: Luna Coffee Bar, 9 5th St S.

What: Chat with others about a book you've brought, read your book, relax or write/continue to read.



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Great Falls Public Library July 2024 Events

Estate Planning Workshop and training

When: July 24(training) 25 and 26 (workshop), 9 am to 5 pm

Where: Cordingley Room

What: Legal professionals will assist participants in completing their estate planning documents at no cost. The program serves seniors, adults with disabilities, and enrolled tribal members. Their services are not designed to handle complex estates or large assets, and they do not handle any trusts.



Montana Primary Care Association Health Insurance Navigator

When: Friday, July 12, Noon to 1 pm.

Where: First Floor Display Area

What: If you are struggling with enrolling in the Health Insurance Marketplace or just want to learn more about health insurance options available to you, then come talk with a Healthcare Navigator.



YOUTH SERVICES EVENTS

Lego STEM Challenge

When: Tuesdays, 10-11am on July 2, 9, 16

Where: Cordingley Room

Audience: Kids and teens ages 8 to 18

What: Lego STEM Challenge is a hands-on Lego science series featuring brand new projects for advanced builders. This program is in high demand, and sign-ups are required. For safety reasons, the minimum age to attend is 8. Please leave your Legos at home! We have plenty for everyone at the Library, and we don't want yours to get lost. For more information or to sign up, please call 406-453-0349, ext. 215 or send an email to nrobinson@greatfallslibrary.org.



Great Falls Public Library July 2024 Events



Wild Cats and Dogs-Montana Wildlife Storytime

When: Wednesday, July 3, 10:30 to 11:30 am

Where: Cordingley Room (basement)

Audience: Children ages 2 ½ to 10 and their families and caregivers

What: Learn more about the mountain lions, bobcats, and foxes that inhabit the Treasure State at our Montana Wildlife Storytime. This program will feature hands-on wildlife trunks from Montana Fish Wildlife and Parks. For more information about educational resources from Montana State Parks, please visit: <https://fwp.mt.gov/stateparks/education-resources>

July Toddler Time

Date and Time of Event: Friday mornings, 10:30 to 11:15 am on July 5, 12, 19, 26

Where: Cordingley Room (basement)

Audience: Babies and toddlers birth to 2 ½ years and their families and caregivers

What: Babies, toddlers, and their families are invited to join us in the Cordingley Room (basement) to build early literacy skills with songs, movement, lap bounces, and a great story.



Bears-Montana Wildlife Storytime

When: Wednesday, July 10, 10:30 to 11:30 am

Where: Cordingley Room

Audience: Kids 2 ½ to 10 and their families and caregivers

What: Learn more about Montana's bears at this free, hands-on nature and literacy event. This program will feature hands-on wildlife trunks from Montana Fish Wildlife and Parks.

Great Falls Public Library July 2024 Events

Elk-Montana Wildlife Storytime

When: Wednesday, July 17, 10:30 to 11:30 am

Where: Cordingley Room-Basement

Audience: Kids 2 ½ to 10 and their families and caregivers

What: Learn more about Montana's elk at this free, hands-on nature and literacy event.



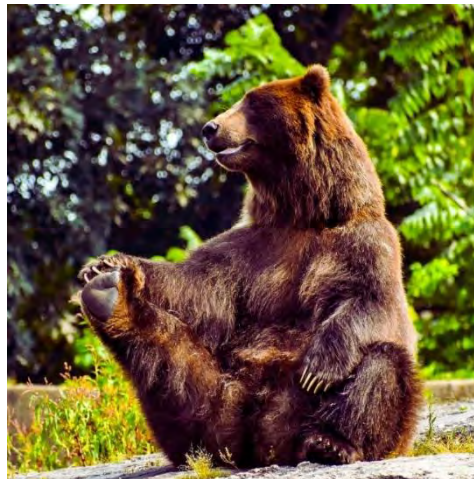
Animal Alphabet Yoga-Move and Learn Storytime

When: Thursday, July 25 from 10:30 to 11:30 am

Where: Kids' Place (1st floor)

Audience: Kids 2 ½ to 8 years and their families and caregivers

What: Move and Learn with us this summer! This week, stretch body and mind with animal alphabet yoga. Dress to move! We have yoga mats on hand, but please bring your own if you have one.



Superhero Adventure Crafts

When: Wednesday, July 3, from 1 to 2pm

Where: Cordingley Room

Audience: Kids 5-12 years old and their families

What: This summer, the adventure begins at your library! Join us on Wednesday afternoons for 6 weeks of hands-on adventure crafts, a tasty themed snack, and a selfie station! This week, we will make superhero crafts! Make your own superhero costume with a shield, mask, and cape, then take a picture at our superhero selfie station. Make a superhero snow globe to take home, and enjoy a superpowered snack of Potassium Ray Guns (bananas) and X-Ray Vision Sticks (baby carrots).

Great Falls Public Library July 2024 Events

Sensory Adventure Crafts

When: Wednesday, July 10 from 1 to 2pm

Where: Cordingley Room

Audience: Kids 5-12 years old and their families

What: This summer, the adventure begins at your library! Join us on Wednesday afternoons for 6 weeks of hands-on adventure crafts, a tasty themed snack, and a selfie station! This week, celebrate your senses by making galaxy sensory jars, fidget keychains, and beaded wind chimes. Taste a delicious fresh fruit snack, and take a sparkle selfie at our selfie station.



Space Adventure Crafts

When: Wednesday, July 17, from 1 to 2pm

Where: Cordingley Room

Audience: Kids ages 5-12 years old and their families

What: This summer, the adventure begins at your library! Join us on Wednesday afternoons for 6 weeks of hands-on adventure crafts, a tasty themed snack, and a selfie station! This week, we wrap up our Adventure Crafts series with space crafts. Make sparkling moon rocks, design your own alien, and paint your own moon. Explore the solar system and get your heart pumping with the Jump to Jupiter solar system model, then take a break and snack on freeze-dried astronaut fruit.

Dragon Appreciation Day

When: Thursday, July 18, 11am to noon

Where: Cordingley Room

Audience: Kids and teens 3 to 18 and their grown-ups, too!

What: An annual tradition returns! Kids, teens, and their families are invited to celebrate dragons in literature and mythology with a variety of crafts from fire-breathing dragon cups for little ones, to dragon origami bookmarks and bobble heads for big kids, to challenging optical illusion Gathering for Gardner dragons.



Great Falls Public Library July 2024 Events

Dungeons and Dragons Summer Campaign

When: Saturdays from 3 to 5:30 pm on July 13, 20, 27. There is no D&D on July 5 due to the holiday.

Where: Cordingley Room-Basement

Audience: Preteens and teens ages 10 to 18.

What: Our Summer D&D Campaign will meet on Saturdays from 3 to 5:30 pm for eight weeks. Make new friends and get creative with this fantasy-themed tabletop role-playing game. D&D supports the development of social, problem solving and practical math skills! A snack will be provided. ASL interpretation available upon request.



Dungeon Master Bootcamp-Learn how to run your own Dungeons and Dragons Campaign!

When: Tuesday afternoons, 2-4pm

July 9-Cordingley Room (basement)

July 16-Cordingley Room (basement)

July 23-Teen Scene (2nd floor)

July 30-Cordingley Room (basement)

Audience: Teens 12-18 years

What: Learn how to run your own Dungeons & Dragons games or take your DM skills to the next level! Sign up is NOT required to attend these free workshops.

A snack will be provided. Please contact Youth Services staff in case of food allergies or dietary restrictions.

Thelma and Kelp's Unicorn Party

When: Thursday, July 11, 11am-12pm

Where: Cordingley Room

Audience: Kids 3 to 12 and their families and caregivers

What: Celebrate your sparkle at our Unicorn Party. We will honor all of our favorite unicorns (including Thelma, Kelp, Twilight Sparkle, and Uni the Unicorn) by making unicorn slime, unicorn shrinky-dink keychains and necklaces, unicorn horn headbands and My Little Pony ponytail holders.



Patron Feedback for June 2024

A man came to the reference desk to get a document notarized. He brought his 3-yr-old son with him, & his son was so cute & smart! During the notarization, the little boy showed the staff member that he could add 3+4, & was just generally charming! One of the last things they talked about were the books that he really loved to check out from the library. His favorite books were Dr. Seuss & Pete the Cat.

A patron came in to the library to sign up for the Adult Summer Reading Program, & she told the staff member helping her how excited she was for the program. She had already finished the Bookworm Challenge & expressed her appreciation for the adult reading programs the library has to offer. She was really looking forward to any adult programs the library has to offer in the future.

A couple signed up for library cards. As the staff member was explaining everything the library has to offer, one of the patrons said, "Oh wow! I didn't know the library had all of that! That's awesome!"

The bookmobile driver was out to a new location. It's a supplemental center for homeschooled students. The director was super excited about the bookmobile & the setup, & she didn't realize it was a service our library offered. She told the bookmobile driver that she was her hero. The bookmobile driver wanted to let her supervisor know that the bookmobile is out meeting new faces & making memories for our youth & community.

Had a lady come in tonight who really liked the Bookworms challenge, and said that she found lots of great books she wouldn't have otherwise found.

Library Income

	FY2025 DEPARTMENT BUDGET	FY2025 EST. BUDGET	FY2024 MODIFIED SPENDING PLAN	FY2024 BUDGET	FY2023 ACTUAL
TAXES	\$ (2,889,600.00)	\$ (2,889,600.00)	\$ (2,879,347.51)	\$ (2,424,500.00)	\$ (906,924.05)
31101 Taxes Real Current Ad Valorem	\$ (2,872,800.00)	\$ (2,872,800.00)	\$ (2,871,386.13)	\$ (2,400,000.00)	\$ (858,645.63)
31103 Taxes Real Delinquent Ad Valorem)	\$ (8,000.00)	\$ (8,000.00)	\$ (6,444.01)	\$ (6,000.00)	\$ (7,274.45)
31105 Taxes Real Protested Taxes				\$ -	\$ -
31121 Taxes--Mobile Home Taxes	\$ (2,000.00)	\$ (2,000.00)	\$ (885.75)	\$ (2,000.00)	\$ (3,353.83)
31122 Taxes--Other Personal Property	\$ (5,000.00)	\$ (5,000.00)	\$ (241.69)	\$ (15,000.00)	\$ (36,025.53)
31200 Taxes--Delinquent Tax Penalty	\$ (1,800.00)	\$ (1,800.00)	\$ (389.93)	\$ (1,500.00)	\$ (1,624.61)
INTERGOVERNMENTAL	\$ (214,885.29)	\$ (214,885.29)	\$ (216,194.79)	\$ (209,075.00)	\$ (566,252.75)
33800 Taxes--County	\$ (177,000.00)	\$ (177,000.00)	\$ (177,000.00)	\$ (177,000.00)	\$ (177,000.00)
33500 Cultural Grant (State Aid)	\$ (35,526.29)	\$ (35,526.29)	\$ (37,063.74)	\$ (29,716.00)	\$ (29,650.99)
33800 Coal Tax Support (Montana State)	\$ (2,359.00)	\$ (2,359.00)	\$ (2,131.05)	\$ (2,359.00)	\$ (2,132.42)
383100 City taxes (general fund)				\$ -	\$ (356,000.04)
33900 Payment in Lieu of Taxes				\$ -	\$ (1,469.30)
CHARGES FOR SERVICES	\$ (32,690.00)	\$ (32,690.00)	\$ (32,734.15)	\$ (33,400.00)	\$ (39,285.89)
34316 Off-street lots	\$ (1,600.00)	\$ (1,600.00)	\$ (2,634.00)	\$ (2,000.00)	\$ (5,505.84)
34691 Library Fees	\$ (12,790.00)	\$ (12,790.00)	\$ (10,100.00)	\$ (10,100.00)	\$ (13,100.00)
34692 Service Charges Miscellaneous	\$ (5,500.00)	\$ (5,500.00)	\$ (4,889.45)	\$ (5,000.00)	\$ (4,845.29)
34693 Library Equipment Charges	\$ (12,000.00)	\$ (12,000.00)	\$ (11,300.70)	\$ (12,000.00)	\$ (11,028.61)
34694 Library Facility Charges	\$ (800.00)	\$ (800.00)	\$ (880.00)	\$ (800.00)	\$ (750.00)
34695 Library Foundation Book Purchase	\$ -	\$ -	\$ (2,930.00)	\$ (3,500.00)	\$ (4,056.15)
FINES & FORFEITURES	\$ (6,500.00)	\$ (6,500.00)	\$ (5,376.26)	\$ (6,500.00)	\$ (7,365.04)
35134 Collection Agency Fines	\$ -	\$ -	\$ (166.98)		\$ (349.27)
35220 Lost Book Fines	\$ (6,500.00)	\$ (6,500.00)	\$ (5,209.28)	\$ (6,500.00)	\$ (7,015.77)
OTHER INCOME	\$ (18,000.00)	\$ (16,000.00)	\$ (17,081.69)	\$ (12,500.00)	\$ (13,937.90)
37110 Regular Interest (City handles accounts)	\$ (8,000.00)	\$ (8,000.00)	\$ (3,291.02)	\$ (2,500.00)	\$ (4,832.99)
36210 USBP Credits (utility credit)	\$ -	\$ -			\$ (46.66)
36500 Contributions and Donations	\$ (10,000.00)	\$ (8,000.00)	\$ (13,740.67)	\$ (10,000.00)	\$ (9,040.00)
36829 Refunds and Reimbursement	\$ -	\$ -	\$ (50.00)		\$ (18.25)
REVENUE TOTAL	\$ (3,161,675.29)	\$ (3,159,675.29)	\$ (3,150,734.40)	\$ (2,685,975.00)	\$ (1,533,765.63)

Library Expenses

41110 PERSONNEL SERVICES	\$ 2,234,064.00	\$ 2,241,849.88	\$ 1,593,800.62	\$ 2,135,100.00	\$ 1,201,138.99
41210 Salaries and Hourly	\$ 1,557,273.00	\$ 1,542,314.79	\$ 1,103,697.46	\$ 1,478,415.49	\$ 818,266.01
41370 Health Insurance	\$ 361,555.00	\$ 365,932.56	\$ 264,367.18	\$ 354,456.04	\$ 210,956.83
41385 Life Insurance	\$ 2,131.00	\$ 2,109.00	\$ 2,007.00	\$ 2,634.44	\$ 1,733.70
41410 Unemployment Insurance	\$ 6,206.00	\$ 6,940.42	\$ 4,543.09	\$ 6,089.74	\$ 4,253.19
41420 Workers Compensation	\$ 6,989.00	\$ 9,607.43	\$ 7,289.14	\$ 9,718.95	\$ 5,376.61
41430 FICA	\$ 96,551.00	\$ 95,623.52	\$ 65,669.72	\$ 87,957.87	\$ 48,257.40
41435 Medicare	\$ 22,584.00	\$ 22,363.56	\$ 15,358.28	\$ 20,570.84	\$ 11,286.02
41445 PERS	\$ 160,846.00	\$ 177,029.60	\$ 115,377.50	\$ 154,540.84	\$ 85,825.23
41510 Miscellaneous Pensions	\$ 19,929.00	\$ 19,929.00	\$ 15,491.23	\$ 20,715.79	\$ 15,184.00
41918 Personal Contingency					
SUPPLIES	\$ 42,000.00	\$ 42,000.00	\$ 30,620.89	\$ 48,293.00	\$ 24,593.93
42110 Papers & Forms	\$ 3,000.00	\$ 3,000.00	\$ 2,000.00	\$ 3,000.00	\$ 1,725.13
42120 Computer Accessories	\$ 7,500.00	\$ 7,500.00	\$ 6,000.00	\$ 7,500.00	\$ 4,715.55
42190 Other Office Supplies & Materials	\$ 9,500.00	\$ 9,500.00	\$ 8,000.00	\$ 16,100.00	\$ 6,072.36
42310 Gas Oil, Diesel Fuel, Grease Etc.	\$ 8,000.00	\$ 8,000.00	\$ 4,620.89	\$ 7,693.00	\$ 3,310.84
42390 Other Repair & Maintenance Supplies	\$ 14,000.00	\$ 14,000.00	\$ 10,000.00	\$ 14,000.00	\$ 8,770.05
PURCHASED SERVICES	\$ 312,384.00	\$ 312,384.00	\$ 249,693.92	\$ 312,018.00	\$ 205,522.95
43110 Postage, Box Rent, etc. (Postage)	\$ 5,000.00	\$ 5,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00
43210 Printing, Forms, Etc.	\$ -	\$ -	\$ -	\$ 200.00	\$ -
43320 Books, Subscriptions, Newspapers	\$ 80,000.00	\$ 80,000.00	\$ 60,000.00	\$ 80,000.00	\$ 23,237.62
43350 Membership Dues	\$ 1,000.00	\$ 1,000.00	\$ 750.00	\$ 1,000.00	\$ 990.00
43410 Telephone	\$ 3,400.00	\$ 3,400.00	\$ 3,200.00	\$ 3,200.00	\$ 3,205.04
43412 Fax & Other Telephone Lines	\$ 3,000.00	\$ 3,000.00	\$ 3,500.00	\$ 3,500.00	\$ 1,537.70
43420 Electric Utility	\$ 78,000.00	\$ 78,000.00	\$ 68,911.98	\$ 75,000.00	\$ 32,011.86
43430 Gas Utility	\$ 13,000.00	\$ 13,000.00	\$ 8,000.00	\$ 13,000.00	\$ 12,497.78
43440 City Sanitation Disposal	\$ 2,100.00	\$ 2,100.00	\$ 1,674.00	\$ 1,939.00	\$ 2,261.10
43450 Water Utility	\$ 3,600.00	\$ 3,600.00	\$ 2,841.30	\$ 2,841.00	\$ 2,607.90
43460 Sewer Utility	\$ 1,500.00	\$ 1,500.00	\$ 1,327.70	\$ 1,327.00	\$ 919.24
43470 Storm Drain Utility	\$ 1,000.00	\$ 1,000.00	\$ 911.90	\$ 911.00	\$ 929.56
43526 Collection Agency costs	\$ -	\$ -	\$ -	\$ -	\$ -
43550 Computer Programing	\$ 53,500.00	\$ 53,500.00	\$ 50,000.00	\$ 50,000.00	\$ 45,094.45
43590 Other Professional Misc.	\$ 13,500.00	\$ 13,500.00	\$ 13,000.00	\$ 13,000.00	\$ 49,042.37

43590	Other Professional Misc.	\$ 20,700.00	\$ 20,700.00	\$ -	\$ 30,000.00	
43620	Building Repair & Maintenance	\$ 7,500.00	\$ 7,500.00	\$ 6,000.00	\$ 7,500.00	\$ 5,207.13
43630	Maintenance Agreements	\$ 23,000.00	\$ 23,000.00	\$ 23,000.00	\$ 23,000.00	\$ 19,839.46
455150	Bank and Credit Card Fees	\$ 984.00	\$ 984.00	\$ 1,600.00		\$ 662.98
45320	Office Equipment Rentals	\$ 1,600.00	\$ 1,600.00	\$ 977.04	\$ 1,600.00	\$ 1,478.76

	OTHER	\$ 450.00	\$ 450.00	\$ 171.84	\$ 450.00	\$ 299.13
45920	Refunds & Reimbursements	\$ 450.00	\$ 450.00	\$ 171.33	\$ 450.00	\$ 299.73
48130	Cash Over/Short			\$ 0.51		\$ (0.60)
48350	Claims & Judgments					\$ -

	INTERNAL SERVICE CHARGES	\$ 119,972.00	\$ 138,114.30	\$ 120,085.00	\$ 116,653.00	\$ 118,785.04
48611	Human Resources	\$ 35,998.00	\$ 38,897.30	\$ 29,921.00	\$ 29,921.00	\$ 34,377.00
48637	Vehicle & Equipment Maint	\$ 2,319.00	\$ 8,500.00	\$ 7,693.00	\$ 4,262.00	\$ 3,489.00
48652	Fiscal Services	\$ 18,151.00	\$ 19,299.50	\$ 17,545.00	\$ 17,545.00	\$ 17,154.00
48658	Central Insurance	\$ 57,870.00	\$ 66,128.70	\$ 60,117.00	\$ 60,117.00	\$ 52,486.00
486590	Deductible Insurance Recovery	\$ -	\$ -	\$ -	\$ -	\$ 7,500.00
48659	Information Technology	\$ 3,172.00	\$ 3,367.10	\$ 3,062.00	\$ 3,061.00	\$ 2,453.04
48695	Computer Network	\$ 135.00	\$ 145.20	\$ 132.00	\$ 132.00	\$ 186.96
48696	Computer Equipment Main	\$ 2,049.00	\$ 1,510.30	\$ 1,373.00	\$ 1,373.00	\$ 909.00
48697	Computer & Equipment Lease	\$ 278.00	\$ 266.20	\$ 242.00	\$ 242.00	\$ 230.04
48810						

	CAPITAL OUTLAY	\$ -	\$ 1.00	\$ -	\$ -	\$ 17,437.85
49310		\$ -	\$ 1.00	\$ -	\$ -	\$ 17,437.85

	EXPENSES TOTAL	\$ 2,708,870.00	\$ 2,734,799.18	\$ 1,994,372.27	\$ 2,612,514.00	\$ 1,567,777.89
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	Total Revenue	\$ (3,161,675.29)	\$ (3,159,675.29)	\$ (3,150,734.40)	\$ (2,685,975.00)	\$ (1,533,765.63)
	Total Expense	\$ 2,708,870.00	\$ 2,734,799.18	\$ 1,994,372.27	\$ 2,612,514.00	\$ 1,567,777.89
	UNDER/OVER BUDGET	\$ (452,805.29)	\$ (424,876.11)	\$ (1,156,362.13)	\$ (73,461.00)	\$ 34,012.26

UPDATED NOTES FOR PROPOSED FY2025 ESTIMATED BUDGET:

REVENUE:

31101- 31200 TAX REVENUE: Tax Revenue estimates are based on an expected revenue of \$119,000/per mill for 24 City Mills which is what we expect to receive in FY2024. The revenue estimate is conservative because property tax reform is being discussed across Montana. There is uncertainty about future decisions by the State Legislature about tax rates and by the Department of Revenue about tax protests. (Estimates approved by City of Great Falls Fiscal Department)

33800 TAXES COUNTY: The Library has an agreement with the Cascade County Commission to provide library services to all residents of Cascade County in return for financial support. The agreement is quite outdated. We have attempted to renegotiate the agreement several times in the past, but have not been successful. The estimated revenue is based on past financial support from Cascade County. They have provided \$177,000 each year for many years.

33500 CULTURAL GRANT STATE AID: Montana provides public libraries with State Aid based on a per capita service area formula. In order to receive the State Aid, each public library must meet the State Public Library Standards. During the last legislative session, the state aid formula was increased to \$0.50/capita which resulted in an increase in this revenue. The legislation also allowed for Tribal Libraries to receive State Aid in addition to public libraries. The estimated revenue is derived from figures provided by the Montana State Library.

33800 COAL TAX SUPPORT: Montana designates that a portion of the state severance tax on coal mining go to the library federations to help local libraries provide basic services. The federation libraries receive the annual funds by the end of September. Each federation submits an annual plan of service to the Commission for approval that details how the funds will be spent. The estimated revenue is derived from figures past funding and conversation with the Montana State Library.

34316 OFF-STREET LOTS: Parking revenue has decreased. The Library no longer receives revenue from patron parking. Part of our levy implementation plan is to provide free parking for patrons. We continue to generate some revenue from leasing parking spots in the staff parking lot. The increase in library staff means that there are fewer spots available for lease. The estimated revenue is derived from the number of lease spots available for FY2025.

34691 LIBRARY FEES: The Library generates revenue by leasing space to the Foundation, the Self-Help Law Clinic and AAUW. The estimated revenue is derived from the existing lease agreements.

34692 SERVICE CHARGES MISCELLANEOUS: The Library raises miscellaneous revenue from several different charges. (\$3.00 for Notary Service, \$10.00 to proctor tests, \$1.00 for discarded books, 3% credit card convenience fee.) The estimated revenue is derived from past income trends.

34693 LIBRARY EQUIPMENT CHARGES: The Library raises revenue from charging for faxing, printing and copying. (\$0.15 per page for black and white printing, \$0.50 per page for color printing, \$1.00 per page for faxing). The estimated revenue is derived from past income trends.

34694 LIBRARY FACILITY CHARGES: The Library raises revenue from charging out-of-county residents \$30 per year for a Library card. The estimated revenue is derived from past income trends.

34695 LIBRARY FOUNDATION BOOK PURCHASE: In previous years, the Library has taken a 3% administrative fee from funding for Foundation Approved Projects for the operational budget. After conversations with Foundation and Library staff, we are recommending no longer taking this administrative fee. That will allow all Foundation Approved Project funding to be used for the actual projects and will eliminate the staff time calculating and processing the fee.

35220 LOST BOOK FINES: The Library raises revenue from charging patrons for lost or damaged items. We have seen a slight reduction in the lost book fine income since we eliminated late fees because more items are being returned. (National studies show that patrons are more likely to return late items when the penalty of a late fee is removed.) The estimated revenue is derived from past income trends.

37110 REGULAR INTEREST: The Library receives revenue from interest generated on the Library Fund account. Increased interest rates greatly increased the regular interest revenue for FY2024. The estimated revenue is derived from past income trends.

36500 CONTRIBUTIONS AND DONATIONS: The Library receives revenue from the Friends of the Library book sale. **We increased the estimated revenue based on the income from the May Sale.**

EXPENSES:

41110 PERSONNEL SERVICES

41210 SALARIES AND HOURLY: Library salary and hourly expenses are estimated based on current staff (and hiring an Assistant Director to start in early August). MFPE union members will receive a 3% cost of living raise. Union members will also receive step and longevity increases according to the collective bargaining agreement. Crafts union members will receive raises as agreed to in the union pay matrix. Non-union staff will receive merit-based raises (1%-5%) based on their performance over the past year. **We increased the salary costs after being able to exactly calculate the impact of longevity and step increases.**

41210 HEALTH INSURANCE: Full-time staff are provided health insurance. Staff choose their insurance coverage package based on the needs of their family (Individual coverage, Couple coverage, Parent & Child coverage or Family coverage). Health premiums are shared costs with the Library paying 85 (eighty-five) percent of the premium and the employee paying 15 (fifteen) percent of the premium. Health Insurance expenses are estimated based on an estimated 15% premium cost increase and on current full-time staff numbers (and hiring an Assistant Director to start in early August). **We decreased the health insurance costs after being able to confirm the level of insurance (single family etc.) of all of the newly hired employees.**

413700 LIFE INSURANCE: The Library pays for life insurance for management team staff. Library life insurance expenses are estimated based on current staff (and hiring an Assistant Director to start in early August). **We made a minor increase in the life insurance costs based on based on the increased salary base costs.**

41400 UNEMPLOYMENT INSURANCE: Unemployment insurance payments are calculated at 0.0045 times salary/hourly payments. Unemployment Insurance expenses are estimated based on current staff (and hiring an Assistant Director to start in early August). **We decreased the unemployment insurance costs based on feedback from fiscal.**

414200 WORKERS COMPENSATION: Workers compensation payments are calculated based on the type class of work performed. (Clerical staff = 0.0029 times salary/hourly payments, Professional & Administrative staff = 0.0070 times salary/hourly payments, Nonprofessional = 0.014 times salary/hourly payments) Workers compensation expenses are estimated based on current staff (and hiring an Assistant Director to start in early August). **We decreased workers compensation costs with information about decreased rates.**

414300 FICA (Federal Insurance Contributions Act): FICA payments are calculated at 0.062 times salary/hourly payments. FICA expenses are estimated based on current staff (and hiring an Assistant Director to start in early August). **We made a minor increase in the FICA costs based on the increased salary base costs.**

414350 MEDICARE: Medicare payments are calculated at 0.0145 times salary/hourly payments. Medicare expenses are estimated based on current staff (and hiring an Assistant Director to start in early August). **We made a minor increase in the MEDICARE costs based on the increased salary base costs.**

414450 PERS (Public Employee Retirement): Pers payments are calculated at 0.00907 times (salary/hourly plus \$11,700 insurance base). PERS expenses are estimated based on current staff (and hiring an Assistant Director to start in early August). **We decreased the PERS costs based on feedback from fiscal.**

415100 MISCELLANEOUS PENSIONS: As part of the collective bargaining agreement, the Library pays directly into the crafts pension plan for crafts union staff. Expenses are estimated based on current staff crafts union membership and the union pay matrix in the collective bargaining agreement.

421100 PAPER & FORMS: Expenses for the Technical Services Department are charged to paper & forms. Expenses for that department include all the items used to process and repair books, CD's and DVD's. The estimated expenses for are derived from past department expense trends plus an increase for a projected increase in the number of items to be processed for FY2025.

421200 COMPUTER ACCESSORIES: Information Technology expenses are charged to computer accessories. Expenses for that department include all the hardware, software and accessories for staff and public computers and technology. The estimated expenses are derived from past department expense trends plus an increase for a projected increase in the number of staff requiring IT support.

421900 OTHER OFFICE SUPPLIES AND MATERIALS: Expenses for Library Administration are charged to other office supplies and materials. Expenses for that department include purchases of paper, office supplies, name tags, staff furniture, etc. The estimated expenses are derived from past department expense trends plus an increase for the increase in the number of staff and the additional hours of patron service.

423100 GAS, OIL, DIESEL FUEL, GREASE: Expenses for fuel for the Bookmobile and the Library van are charged to gas, oil, diesel fuel, grease. The estimated expenses are derived from past department expense trends plus estimates for increases in fuel costs plus expanded Bookmobile and van usage.

42390 OTHER REPAIR & MAINTENANCE SUPPLIES: Custodial supplies such as paper and cleaning products are charged to other repair & maintenance supplies. The estimated expenses are derived from past department expense trends plus estimates for increases due to expanded hours and usage of the library.

43110 POSTAGE, BOX RENT, ETC. (POSTAGE): The estimated expenses for postage are derived from past department expense trends. With current postage usage, it appears that we will be over budget on postage in FY2024. As we increase our number of patrons, we will increase the number of notices that we need to mail. (We send email and text notifications as much as possible.)

43210 PRINTING, FORMS, ETC.: For the past several years, we have not spent any funds from the print, forms line so we suggest not budgeting funds in that line for FY2025.

43320 BOOKS, SUBSCRIPTIONS, NEWSPAPERS: The Board approved the materials budget at their March meeting. Including the funds for the books, subscriptions, newspapers line.

43350 MEMBERSHIP DUES: Dues for the Museum Consortium and Chamber of Commerce are charged to membership dues. The estimated expenses are derived from past membership expenses.

43410 TELEPHONE: The Library contracts for telephone service from Century Link. The estimated expenses are based on current monthly costs and anticipated increases.

43412 FAX & OTHER TELEPHONE LINES: The Library has a five year contract with Vision Net for 1 Gigabyte/second speed internet from Vision Net. 80% of Library Internet is funded through the Federal eRate Program. The estimated expenses are based on the current contract and expected eRate funding.

43420 ELECTRIC UTILITY: The Library's electricity is purchased through the City of Great Falls contracts with Energy Keepers for electricity and Northwestern Energy for transmission. The estimated expenses are based on current monthly costs and anticipated increases.

43430 GAS UTILITY: 43440 CITY SANITATION DISPOSAL: 43450 WATER UTILITY: 43460 SEWER UTILITY: 43470: STORM DRAIN UTILITY: Library utility charges are estimated based on current monthly charges plus anticipated increases due to inflation AND expanded Library open hours.

43550 COMPUTER PROGRAMING: Software contracts and maintenance agreement expenses are charged to computer programming. These expenses include the following.

- G-Suites Evonance: Charges for email, google drive and record archiving estimated at \$6,500
- OCLC: Charges for interlibrary loan and cataloging software services estimated at \$7,500
- Montana Shared Catalog: Fee for software and support estimated \$30,000
- Envisionware: Fees for print solution, ongoing software costs, and hardware maintenance estimated at \$7,500
- Website hosting: Fees for website hosting estimated at \$500
- Other software costs: Fees for Wowbrary and Kitkeeper estimated at \$1,500

43590 OTHER PROFESSIONAL SERVICES MISC.: Contracts for services such as background checks, snow removal, professional repair etc. are charged to other professional services misc. The estimated expenses for professional services are based on past trends and anticipated increases due to more open hours.

43590 OTHER PROFESSIONAL MISC. MENTAL HEALTH CONTRACTS: Current funding for the mental health professional services from Many Rivers Whole Health are provided through NCILS contract sponsored by the Local Area Council. This pilot project has been successful in providing referrals for Library patrons, deescalating patron behavior and supporting staff. The current funding through NCILS continues through September 2024. The estimated cost is based on current costs and initial conversations with Many Rivers Whole Health about continuing the service after the pilot project has concluded.

43620 BUILDING REPAIR & MAINTENANCE: Expenses related to building repairs and maintenance are charged to building repair & maintenance. The estimated expenses are based on past trends and anticipated increases due to more open hours.

43630 MAINTENANCE AGREEMENTS: Maintenance contracts for the elevators, printers, and copiers are charged to maintenance agreements. The estimated expenses are based on existing contracts.

455150 BANK AND CREDIT CARD FEES: Fees for taking credit cards are charged to bank and credit card fees. The estimated expenses for are based on current monthly expenses.

45320 OFFICE EQUIPMENT RENTALS: The cost of renting our postage machine is charged to office equipment rentals. The estimated expenses are based on the current contract.

INTERNAL SERVICE CHARGES: internal services are those responsibilities a government provides to support its own internal operations. Internal service charge funds have been created to separately account for these internal transactions throughout all City departments. Each Internal Service Fund prepares an annual budget, then divides the expenses of that fund out to other funds in the City using a factor. The factor is different for each internal service charge.

48611 HUMAN RESOURCES: Factor based on employee average from prior two years. The estimated expenses include an estimated 30% increase based on historic increases and on the significant increase in the number of Library staff. **We updated the HR cost based on final figures from HR. (HR attributes the 20% increase in our HR costs to “General Internal expenses increasing.”)**

48637 VEHICLE & EQUIPMENT MAINTENANCE: Factor based on three-year average of job order charges. We increased the budgeted amount for FY2024 anticipating a large increase in the time on the road for the Bookmobile and van. The estimated expenses include an estimated 10% increase based on historic increases in maintenance charge. **We updated the VEHICLE & EQUIPMENT MAINTENANCE cost based on final figures from Public Works.**

48652 FISCAL SERVICES: Factor based on prior 2 years number of transactions less payroll. The estimated expenses include an estimated 10% increase based on historic increases in fiscal services charges. **We updated the FISCAL SERVICES cost based on final figures from the finance department.**

48658 CENTRAL INSURANCE: Factor for liability insurance based on salary figures of the department. Factor for property insurance based on Library asset list. The estimated expenses include an estimated 20% increase based on historic increases and on the significant increase in the number of Library staff. **We updated the CENTRAL INSURANCE cost based on final figures from HR.**

486590 DEDUCTIBLE INSURANCE RECOVERY: None expected this year.

48659 INFORMATION TECHNOLOGY, 48695 COMPUTER NETWORK, 48696 COMPUTER EQUIPMENT MAIN, 48697 COMPUTER & EQUIPMENT LEASE: Factor based on the number of computers and servers by Department. The estimated expenses include an estimated 10% increase based on historic increases. **We updated the IT costs based on final figures from IT.**

