

# **Trustee Tool Kit *for* Library Leadership**

**1998 Edition**



California Association of Library Trustees and Commissioners

California State Library  
Dr. Kevin Starr, State Librarian of California  
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## Foreword

*It is with great* pleasure that I introduce this new edition of the **Trustee Tool Kit for Library Leadership**, which will guide our library leaders into the next millennium. California trustees, commissioners, and advisory board members will find it philosophical and practical in the best sense of both words.

The challenges faced by trustees today in assuring the free flow of information and service through public libraries are numerous. Technology, intellectual freedom, and finances, are several of the complex and important issues affecting each public library. While administrative and advisory boards may vary in degree of authority, the pro-active approach displayed throughout the **Trustee Tool Kit** will assist all citizens in reviewing, analyzing, and guiding library services in these turbulent times

We are all indebted to the library trustees who prepared this valuable handbook and to the library trustees who will carry forward its principles for the benefit of the people of California.

A handwritten signature in black ink that reads "Kevin Starr". The signature is written in a cursive, flowing style.

Dr. Kevin Starr  
State Librarian of California


# Introduction

*In the early 1980's*, the predecessor of the CALTAC **Trustee Tool Kit for Library Leadership** was produced. The first edition of the current **Trustee Tool Kit** was produced in 1987. Each was well received. Individual trustees, library boards, and library directors throughout the State found it to be a practical tool. The **Tool Kit** is used in a variety of ways—some use it for orientation and some as a reference book for specific items. Whatever the use, the **Tool Kit** has been found to be a useful guide in developing more effective library leadership.

We have provided chapters with information to help Trustees and Commissioners perform their responsibilities, included some history of libraries as background, some resources for obtaining additional information, and appendices with supplementary information related to library activities and Board responsibilities. Each Board and Board member will use the **Tool Kit** in ways that best suit their situation. Use the Table of Contents as a guide to the information that is included. Please feel free to let CALTAC Board members know what portions of the **Tool Kit** you find most useful and what might be changed or added for the next edition.

Those of us who worked on the updating and editing of this edition of the **Tool Kit** are indebted to those who formed the foundation of this manual years ago and to the State Library for publishing this edition. Professional librarians and public officials throughout the State have lent their experience and expertise, and we value the input that they have given us. I am grateful for the efforts of those on the current CALTAC Board who have given generously of their time and talent. We have benefited by the expertise and experience of Dorothy Bertucci, Barbara Campbell, Karen Dyer, Jean Nix, Elizabeth Pinter and Pat Baur Tillotson.

The members of the 1998 Board of the California Association of Library Trustees and Commissioners are pleased to present this volume to the library community. We encourage you to take it, read it, use it. We are sure that you will find it to be a practical tool.



Roberta "Jackie" Harrison  
1998 President of CALTAC



# Acknowledgements

*Many individuals* have given their time, knowledge, expertise, and ideas in helping with the revision of the **Tool Kit**. The Tool Kit committee expresses its grateful acknowledgement to these individuals in recognition of their valuable contributions:

— Dr. Kevin Starr, State Librarian of California, who has given his support to CALTAC and to the publication of the **Trustee Tool Kit**.

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— Liz Gibson, Susan Hildreth, and Cameron Robertson, and the numerous staff at the State Library who helped review and update the **Tool Kit**.

— The CALTAC Board of Directors who have initiated, encouraged and supported the revision project. They have also provided the seed money to get the project underway. Their desire for an updated publication has resulted in two committees. The first committee, who began the immense task of reviewing the previous work, condensing the size, and preparing the forward direction of the project, was composed of Dorothy Bertucci, Barbara Campbell, Pat Baur Tillotson, and Barbara Whorton. The task of updating all material and rewriting certain sections was passed on to the current committee of Karen Dyer, Jackie Harrison, Jean Nix, and Pat Baur Tillotson.

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On behalf of the CALTAC Revision Committee, our sincere thank you.

1998 Tool Kit Revision Committee

Karen Dyer  
Jackie Harrison

Jean Nix  
Pat Baur Tillotson

# Overview

A brief overview of California library boards and libraries is a logical preface to provide background for the contents of this publication.

As of the end of 1996, there were 174 public library jurisdictions in California, 48 county, 110 city, 4 combined city/county, and 12 special districts. Records at the California State Library show that 81 percent of these public libraries operate with library boards: 141 libraries out of 174. (Since some libraries work with several regional or separate city or county advisory boards, the total number of public library boards actually is 157.) Of these library boards, 59 percent are advisory and 41 percent are administrative in function; a total of 93 advisory and 64 administrative. (See charts in Appendix F.)

A total of 993 dedicated and public service minded citizens serve without pay as members of these public library boards, commissions, or councils throughout the state. Another 179 citizens serve without pay as members of system advisory boards that function in connection with the 15 area cooperative public library systems established by the California Library Services Act of 1977. These systems are not libraries, per se, but are neighboring library linkage systems that permit expanded library service beyond the ability of any one library to provide. These 15 systems include almost all of the state's public libraries.

The 174 public libraries over the state are complex; they are literally information super- markets. They have 3582 public service outlets, including 163 main libraries, 605 branch libraries, 269 library stations, and 58 bookmobiles serving 1471 library stops.

As underscored in **California Libraries in the 1980s: Strategies for Service**, "sheer numbers mask the variety found in California libraries. The largest public libraries are found in Los Angeles County—the Los Angeles City Public Library and the Los Angeles County Library. Each serves more than 3.3 million people. California's two smallest public libraries are also found in Los Angeles County—the Irwindale Public Library, which serves almost 6100 people, and the Vernon Public Library,

which serves fewer than 100 people. Between these two extremes, there are 14 public libraries, each of which serves over a half million people, and 15 public libraries serving populations that number less than 12,500 people each."

Within the state, there are also in excess of 200 academic libraries, 900 special libraries including more than 70 operated by the federal government and 100 state agency libraries, 58 county law libraries, and hundreds of school libraries, plus the State Library which works with all libraries to coordinate service and to extend the sharing of resources. These libraries will not be discussed in detail in this publication because it is directed to trustees serving local public libraries over the state and to system advisory board members.

To plan for public libraries that adequately serve not only present but future community and individual needs of California's diverse 35 million people is a formidable responsibility.

As Dr. Daniel Boorstin, Librarian of Congress, told the White House Conference on Libraries in 1979, "What any free country needs is a knowledgeable citizenry... Each of us must acquire knowledge for himself. Knowledge comes from the free mind foraging in the rich pastures of the whole 'everywhere' past. It comes from finding order and meaning in the whole human experience. The autonomous reader amusing and knowledging himself is the be all and the end all of our libraries."

People from throughout the state who came forward to voice their commitment to excellence in library service and to make recommendations for **California Libraries in the 1980s: Strategies for Service** pointed out: "People turn to libraries for many reasons—to find answers to specific questions, to explore new ideas, and to find out how to do something, or simply to enjoy themselves. Not everyone who comes inside the library doors necessarily wants a book. Occasionally, someone wants help in finding out about community services. Just as people come to libraries for a host of reasons, the people themselves are diverse and their needs many."

California libraries serve people who live in large cities, small towns, sprawling suburban areas, and thinly populated rural areas, many of which are isolated. Libraries serve young children not yet old enough for school who are discovering for the first time ever the wonder of words and the joy of books. Libraries serve school children, high school and college students, working men and women, the retired, senior citizens, the handicapped, and the homebound or institutionalized. Libraries serve people of all economic levels and all educational levels. Libraries serve government officials and

their staff members. Libraries serve small business firms and large corporations. California libraries serve people who speak any number of languages. Libraries serve people who have a dynamic mixture of cultures and Ideas.

Yet, there is agreement today with an article published in the **Herald** newspaper in the small pioneer village of Old San Diego In 1854: A library "... together with the organization of a common school, places us within the pale of civilization and cannot be dispensed with in this age of improvement."

# Chapter 1.

## Statutory Authority

State and local laws created California library boards to represent the people; to serve their communities with quality and community-relevant service; and to provide vital, formal, citizen-user guidance to local government and library staff in planning, management, and evaluation functions. Library board members are public officials with legal responsibilities, whether administrative or advisory. To operate effectively, each library board must understand thoroughly its own particular legal base of operation.

Library boards have a wide variety of names in California: library boards of trustees, library commissions, regional councils, library advisory committees, civic improvement commissions, library and cultural commissions, and system advisory boards. In this publication the word trustee refers to all trustees, commissioners, and council members of public libraries, and system advisory board members of cooperative library systems. Library board refers to all public library boards, commissions, councils, or committees.

### Statutory Differences of Library Boards

In California library boards in various communities may differ in several important ways. The crucial difference is in each board's statutory function as mandated by the specific law or ordinance that established each board. This has resulted in differences in authority and responsibility for library boards in neighboring communities.

Library boards and library directors need to know and understand clearly what their separate mandates are to avoid misunderstandings and to operate effectively. A simple illustration of this is the administrative library board members who hire a library director who, in turn, hires, fires, and manages the staff. It is important that all understand their respective roles and not interfere with the others.

If a question arises as to who is responsible for what, trustees should consult the legal officer of the jurisdiction (such as the city attorney) for an interpretation of the related law or city ordinance. It may be that a specific function policy should be written and approved for future clarification. It is advisable for each trustee's manual to have a copy of the specific law that enumerates the board's exact functions. The library director, city or county clerk, city or county attorney, special district administrator or legal officer can supply a copy.

There are four organizational types of California public libraries: city, county, city-county, and special district. The first three types, comprising the majority of California's library jurisdictions, operate as departments of local general government. The special district library jurisdictions in California are independent, legal governing jurisdictions in themselves, and do not depend on a city or county for governance.

### Two Types of Boards

A library board in California is one of two basic types depending on its function—advisory or administrative. The criteria used by the International City Managers' Association for distinguishing the two types of boards are that an administrative board has: 1) authority for appointing the librarian, and 2) authority for approving the library operating budget. Fewer than half of the public library boards in California are administrative. The remaining are advisory.

### Advisory Library Boards

Library boards for public libraries are designated as advisory when: 1) the library director is appointed by the mayor, mayor and city council, city manager, county board of supervisors, or other county chief administrator; and 2) the library director submits the library budget to the jurisdiction for approval. Advisory public library boards, then, do not appoint the library director or submit the library budget.

The dictionary defines the word *advise* as “give advice to; counsel; give notice; inform; talk over plans; consult with; caution.” In the case of library boards, additional suitable terms might be: to analyze needs, to consider goals, to anticipate future needs and problems, to liaison, to act as sounding board, and to help develop consensus.

To some it might appear that the advisory library board, without administrative functions, is a board with little power or responsibility. Not so. An advisory board is an invaluable resource. A library board must not be simply a rubber stamp for the library director or its appointive jurisdictional body, such as a city council or county board of supervisors. While the advice may not be taken, the board has legal responsibility to advise on policies or issues as the law directs.

The advisory library board’s effectiveness depends to a considerable extent on the in-depth analysis it makes on any issue, the sound reasoning it provides to back up every recommendation, its foresight, and its reasoned persuasiveness in presentation. Diplomacy and patient persistence with the officials whom the board advises are often necessary to assure that important items are not overlooked or sidetracked. In some instances, the law defining the library board’s functions describes specifically the policies and issues on which the board is to advise. In other instances, the law is more general, simply indicating that the library board act in an advisory capacity to the city council in all matters pertaining to city libraries or recommend to the council the adoption of bylaws, rules, and regulations as necessary for the administration and protection of city libraries.

In the case of system advisory boards, the California Library Services Act states: “The duties of each system advisory board shall include, but are not limited to, the following: (a) assisting the administrative council in the development of the system plan of service; (b) advising the administrative council on the need for services and programs; (c) assisting in the evaluation of the services provided by the system.”

Some library agencies operate with several advisory boards, each representing a separate geographic area served. Sonoma County Library, operating under a Joint Powers Agreement as a

separate agency, has an administrative library commission, and advisory boards in nine regional branch libraries.

It is as essential for an advisory library board to know whom it can legally advise as it is to know on what policies and issues it can legally give advice. As a result of the variety of laws establishing advisory library boards in California, not all can legally advise the same persons or the same judicial bodies. For example:

- City advisory library boards may be legally directed to advise the mayor, or the mayor and city council, or the city council, or the library director, or some combination of these. In some cases, their legal directive may not include advising the mayor or the library director, but the council only. It may also state that the board is to work in conjunction with the library director.
- County advisory library boards may be legally directed to advise the county board of supervisors or the county librarian, or both, or the county board of education.
- The system advisory boards that serve each of the cooperative library systems throughout the state are advisory to each system administrative council (consisting of the library directors of each jurisdiction in the system), as mandated by the California Library Services Act.

### Administrative Library Boards

The dictionary defines *administer* as “manage or conduct as chief agent or steward; direct; put in force; dispense; supply or give; act as administrator.” A library board for a public library is designated as administrative if the library board has: 1) authority for appointing the library director, and 2) authority for approving the library operating budget. (In some instances, the library board also may approve the hiring of other library staff employees.) While the administrative library board is a governing body with the authority to determine personnel, fiscal, and administrative policies, the successful administrative library board uses this authority judiciously, working with the library director in an essential team effort to fulfill the library needs of an ever-changing community.

The special library districts in California have elected administrative boards, but the election

process as well as the operation of the special district itself, is different than in cities and counties. Special districts are independent of other local governments, and special library districts exercise autonomy in library, of budget, personnel, buildings and services to the community. However, there are differences even among California's special library district boards. In some special districts, the library boards are elected solely to administer the library. In others, the special library districts operate in conjunction with school districts—unified school or union high school districts.

## Authority For Libraries and Boards

The chief reason for the somewhat confusing differences among California public libraries and library boards is the state's permissive constitution and laws. State law, known as general law because it applies throughout the state, takes precedence over county or city law unless state law declares otherwise in specific instances. This section describes the legal authority defining library boards. For more information about specific laws, please refer to the California Education Code.

The primary keys to library and library board differences over the state are the following:

1. In California there is no state mandate for public libraries. Public libraries exist under permissive legislation, both state and local. This means that state law has provided each local governmental jurisdiction the option to establish, or not to establish, a public library.
2. The California state constitution declares that cities or counties may adopt a charter and operate under "home rule" regulations rather than operate solely under uniform state general law.
3. Each charter city or county has structured its library operation in accordance with its own perceived local needs.

As a result, the statutory authority for public libraries, as well as for library boards' structure and function, comes from one of two types of statutory authority: 1) state general law, or 2) city/county charter.

### General Law Authority

The structure, functions, and powers of all California cities, counties, and special districts are

mandated by the state constitution and state law. Except for those jurisdictions which under the state's permissive constitution have opted to operate under a home rule charter, cities and counties operate today under state general law.

State general law does not require cities and counties operating under general law to establish local libraries. It gives them the permission to establish public libraries if their residents so desire. But, if they do establish libraries, state law sets out the procedure they must follow to establish and operate such libraries.

In the case of general law cities, state law provides that if the city establishes a library, "the public library shall be managed by a board of library trustees" (Calif. Educ. Code, Sec. 18910). State law provides that if a general law county opts to establish a library, "The county free library is under the general supervision of the (county) board of supervisors" (Calif. Educ. Code, Sec. 19160). The state general law also provides that the board of supervisors appoint a county librarian, who shall, subject to the general rules adopted by the board of supervisors, build up and manage, according to accepted principles of library management, a library for the use of the people of the county, and shall determine what books and other library equipment shall be purchased" (Calif. Educ. Code, Sec. 19146).

California's general law also authorizes establishment of special library districts and provides that "the library district may include incorporated or unincorporated territory, or both, in any one or more counties so long as the territory of the district consists of contiguous parcels and the territory of no city is divided."

Any unincorporated town or village is permitted by state general law to establish a Special District for the purpose of equipping and maintaining a public library through petition and vote. State law requires that a library district public library so established "shall be administered by a board of library trustees" (Calif. Educ. Code, Sec. 19600-19734). The system advisory boards for cooperative library systems created by the California Library Services Act operate under state general law.

The statutory authority for public library board structure in general law cities, special library



districts, and cooperative library systems is contained in the California Education Code and in one case, the California Government Code. There are other state and federal laws that also affect libraries and library boards.

### **Charter City/Charter County Authority**

The California state constitution permits a city or county to draft its own charter, and thus to have home rule. The proposed charter is submitted to the voters of the jurisdiction and, if approved, becomes the law. The primary advantages are increased flexibility for the city in the determination of its structure and functions, and the elimination of the need to wait for state legislative authorization to take certain actions. If the city charter itself does not make specific provision for a library board and its functions, that authority may be contained in a city ordinance.

### **Combined City-County Library Authority**

Jurisdictions not administering libraries can serve their residents by agreement with a jurisdiction that does (for example, the Stockton City Library operates for San Joaquin County area, Santa Cruz operates the library service for Santa Cruz County).

## **Authority For Size of Library Boards**

In California there is no uniform number of members on the public library boards. The number of members varies widely. In some communities, library boards also have designated alternate members. The majority of the library boards in California have five members. The number of members legally designated to serve is determined by each board's specific statutory authority.

Three factors generally determine the number of members on a public library board: 1) uneven number to prevent tie votes, 2) an intent to assure representation from all regions which the library serves, and 3) consistency with other boards serving the jurisdiction.

For system advisory boards, the California Library Services Act determines that such boards must consist of one member representing each of the member jurisdictions of the system and may not consist of fewer than five members (Calif. Educ.

Code, Sec. 18747, 18748. Title 5 of the Calif. Code of Regulations, Sec. 20145).

## **Selecting Library Board Members**

There is no uniform procedure for selecting library board members in California. Most board members are appointed, but some are elected. The method of their selection (elected or appointed) and what person or jurisdictional body makes appointments depends on the specific statutory authority establishing each board.

State general law mandates that independent special library district administrative boards of library trustees be elected by voters within the special library district (Calif. Educ. Code, Sec. 19510). In special library districts that are coextensive with unified school or union high school districts, voters within the school district elect the dual-function members of the school board and the administrative board of library trustees (Calif. Educ. Code, Sec. 19700-19702). All system advisory board members for cooperative library systems must be appointed by their respective jurisdictions.

### **Appointing Library Board Members**

In California appointments of library board members are made by a variety of individuals or groups, including city councils, mayors and city councils, mayors with consent of city councils, county boards of supervisors, or the library board itself. The majority of the library board appointments are made by mayors and city councils, or for county libraries, by county boards of supervisors. Each library board's statutory authority determines who makes the appointments.

In the case of system advisory boards, the California Library Services Act stipulates that the governing body of each jurisdiction appoint one member to the advisory board from among its residents (Calif. Educ. Code, Sec. 18747, 18748). The governing bodies may include city councils, county boards of supervisors, or special library district boards of trustees.

### **Filling Vacancies For Unexpired Terms**

The specific statute establishing each board should be examined to determine how to fill unexpected vacancies for unexpired terms. Usually the same

procedure used for filling full term vacancies is followed. Where an elected school board also serves as the library board, the state law governing election of school board members applies.

### **Publicizing Vacancies**

To ensure that the public's business is conducted in public, state law mandates that announcement of vacancies and pending vacancies on all library boards throughout the state be made public. This applies not only to general law cities, counties, and special districts, but also to charter city, charter county, and combined city-county library board posts. All unscheduled vacancies, as well as pending full term vacancies, on all library boards must be posted and published by all cities and counties to take advantage of the diversity of local citizen talent and experience.

### **Requirements For Library Board Membership**

Statutory requirements concerning eligibility for library board membership vary for different boards throughout the state, depending upon the specific statute establishing each board—state general law, city charter or ordinance. Some universals, however, do apply to all boards. Membership is not restricted by sex, race, or creed. There cannot be any official requirement regarding political party affiliations because local government elections in California are non-partisan.

Some jurisdictions may require a library board member: 1) to be a resident of the jurisdiction and a qualified voter, or 2) to be at least 18 years of age, or 3) not in the immediate past to have served two consecutive terms on the library board. The city clerk, county clerk, or special district clerk can report the requirements in each specific jurisdiction.

For cooperative library systems, the California Library Services Act specifies that members of a system advisory board must be representative of the public-at-large and of the underserved residents of the system service area. No person shall serve more than two consecutive terms (Calif. Educ. Code, Sec. 18749).

### **Conflict of Interest**

If the library board has been designated in a governmental jurisdiction's Conflict of Interest

Code, a person assuming membership on the library board is required to file with the clerk a Statement of Economic Interests in compliance with requirements of the Conflict of Interest Code of the California Political Reform Act. The clerk of the city, county, or special district subsequently must make the statement available for inspection by the public. The form must be filed within 30 days after the trustee assumes office, and there may be a penalty for late filing. It is essential that every library board member be aware of the appropriate procedures.

### **Terms of Office For Library Board Members**

The length of the term of office for library board members varies throughout the state. On the majority of library boards, a member's term is four years. The terms of office are generally staggered so not all positions become vacant at one time. This permits new members to serve alongside experienced members.

Local jurisdictional ordinance, policy, and/or public administration policy sometimes designate the number of consecutive terms a library board member may serve, frequently a limit of two consecutive terms. Local jurisdictional policy may also go so far as to require that at least two years elapse before a person who has served two terms may be reappointed. The general premise is that, although a board member will gain experience from unlimited terms of office, multiple terms may preclude an important injection of fresh viewpoints and energetic new approaches to service.

### **Removal from Office**

As with all other legal provisions concerning library board members, any provisions for their removal from office depend upon the specific state law, city charters, or ordinance that establishes the office. Standard provision of law is that if a library trustee violates a trust or fiduciary duty, the trustee may be enjoined from acting as a trustee, suspended, removed, made to pay civil damages, criminally fined or convicted, or sentenced to a term of imprisonment.



## **Compensation**

Laws regarding library boards say little concerning compensation for trustees. State Library records indicate that all members of local library boards in California serve without compensation. However, each jurisdiction's governing body may cover expenses for trustees' materials and professional memberships.

## Chapter 2.

# Library Funding

Since funding is the key to the services that each public library can provide, the search for adequate library funding must be a deep and constant priority for all library trustees. Every public library in California depends upon a local governmental jurisdiction—a city, county, or special district—for its basic budget. Less than ten percent of funding comes from state or federal sources. Non-government funds and gifts also provide some supplementary enrichment for California libraries. Good use of a combination of all funds should bring the broadest and most accessible service to the users of the individual, local library.

All boards for individual libraries and cooperative systems have key leadership roles to perform in securing adequate library funding. That leadership role is implicit in the very definition of a library board: an official body created by state or local laws to represent the people, to see that the community is served with quality and community-relevant service, and to provide vital, formal citizen-user guidance to local government and library staff in planning, managing, and evaluating functions. How well each library board performs its funding advocacy role rests on the shoulders of each trustee.

Advisory boards, although without direct responsibility for library operating budgets, are in a position to show all purse string holding government officials the board's enlightened concern and strong support for libraries. They also have an obligation to make certain that Friends of the Library and volunteers, as well as other citizens and community organizations, are alerted and speaking out. System advisory boards, without direct budgetary responsibility, are in a position to act as knowledgeable advocates and to rally support of others both for the cooperative systems and the libraries in their own communities.

Library boards will be most effective in winning the essential support of government funding officials when every trustee is prepared to discuss

knowledgeably the present library or system funding and sources of funding; and how the funding relates to library or system goals in terms of verifiable community needs.

Trustees may find it useful to look at the annual local revenue of every California public library, its state funds allocation, and its annual total operating income compiled in **California Library Statistics**. This comprehensive reference book is published annually by the California State Library and is available in all libraries.

### Overview: Changing Nature of Local Library Funding

A brief review of local tax law in California for a few previous years may provide a working knowledge of the current primary source of local governmental support money for public libraries. Since 1978 dramatic changes have occurred in California tax laws. Now libraries must compete with other services for the same limited local and state funds. To keep libraries adequately funded, library boards find they must put stronger emphasis on their responsibilities as library advocates.

Traditionally, the chief source of funding for public libraries was a local ad valorem real property tax, or a dedicated-purpose tax for the library. Other sources of local funding for public libraries were also used to some extent. Some city and county public libraries, for instance, obtained their budget funds completely from the general fund. Other city and county libraries had access to special local taxes, such as sales tax, timber yield tax, and transit lodging tax. But, in general, the dedicated-purpose library tax on real property provided the library budget.

In 1978, Proposition 13 reduced all property taxes. It placed a cap on property valuation and a one percent limit on the property tax rate and, consequently, on the total funds derived from them.

All California cities, counties, and special districts continue to be affected.

## **Current Government Sources of Library Funding**

Little has changed the traditional picture of libraries' dependency upon their respective city, county, or special district governmental jurisdictions for their financial existence.

### **City and County Funding Sources**

Cities and counties receive the ad valorem real property tax collected within their respective boundaries. The property tax usually goes into each city's or county's general fund, along with sales tax and all other library charge fees. All cities and counties may use any portion of their general fund monies for library support purposes. The public library and all other city or county departments are mutually dependent on the city or county general fund for their annual operating expenses. Realistically then, the library is in competition with other city or county departments for the limited general funds available.

Some county libraries have been designated as "special districts" to receive their pro rata share of the property tax (by which most of them are funded). It is important to remember that county libraries were designated as special districts for certain fiscal purposes only, on the basis that their service does not have the same boundary lines as the county itself. However, that designation for county libraries often has been a source of confusion because county libraries remain part of general county government. Using special provisions of Proposition 13, several libraries have successfully obtained local voters' approval of a special local library tax levy, which requires a two-thirds vote of approval.

In fiscal year 1992-93, a portion of the local property tax designated for "special district" county libraries was shifted to the State of California. Also, in fiscal year 1993-94, an additional funding source for "special district" county libraries was eliminated when the State of California abolished the Special District Augmentation Fund.

### **Special Library District Funding Sources**

Special library districts have a different funding structure. Under state law (AB 8), special district public libraries are guaranteed their prorated share of the property tax, based on their pre-Proposition 13 share. The same reductions that impacted "special district" county libraries in the early 1990s also impacted special district libraries.

But library districts have special funding problems. Prior to 1978, the library staff and head librarian developed a budget to cover the district's needs, which the trustees approved. The county board of supervisors then established the rate, within a limit set by law, to fund the amount needed by the district. Since 1978, special district boards have lost much of their financial control to the state and to the county.

### **Cooperative Library System Funding Sources**

Funding sources are multiple for California's regional cooperative library systems as a result of their special character. Each system exists as an independent local entity through agreement among its member jurisdictions. The majority of systems are organized under the state Joint Exercise of Powers statute.

Some funding comes from the California Library Services Act (CLSA) allocations for participation in programs specified in CLSA. Other income sources are cash contributions from member jurisdictions, and some federal Library Services and Technology Act (LSTA) funds for special projects and contracts with other local agencies.

CLSA requires each system be governed by an administrative council composed of library directors of member libraries. The state law provides that each administrative council "shall adopt a system plan of service, developed with the assistance of the system advisory board, and prepare a budget for carrying out the objectives of that plan. The system budget request and plan of service shall be annually submitted to the California Library Services Board." The California Library Services Board's annual budget proposal, reflecting the state-funded portion of the cooperative library systems' budgets, is submitted by the State Librarian to the state legislature.

## State Funding Sources

Two state sources of supplemental funding are available to city, county, and special district libraries meeting eligibility requirements. These two acts do not affect local library control, or the dependency of libraries on their local governmental jurisdictions for basic operating incomes. The two sources are:

1. California Library Services Act (CLSA), enacted in 1977
2. Public Library Finance Act (PLF), enacted in 1982

### The California Library Services Act (CLSA)

The purpose of the law is “to encourage and enable sharing and coordination of library resources among and between library systems, state reference centers, and specified libraries ... and make provisions for upgrading services to underserved residents.”

To qualify for CLSA funds, cooperative systems are required to:

- a. Permit each other’s residents to use all members’ services
- b. Provide interlibrary loans among themselves
- c. Provide reference referral and training
- d. Provide communication and delivery between members

State funds are allocated annually by formula for these purposes. CLSA programs are administered at the state level by the State Librarian, under the policy direction of the California Library Services Board, to:

- Support several separate statewide programs that provide funding subsidies for Universal Borrowing, permitting every Californian to borrow from any participating library statewide.
- Partially subsidize Interlibrary Loans (the direct cost of public libraries borrowing from or lending to any library of any type statewide, except those in for-profit entities).
- Funding the creation and maintenance of a computerized, statewide data base. This permits local public libraries to locate books, films, and other materials held by other libraries statewide.
- Initiate programs such as the California Literacy Campaign and the Families for Literacy Program

whose purposes are to help public libraries improve service to traditionally underserved people in their service areas. These CLSA programs help local libraries establish tutoring services to permit California’s functionally illiterate adults to learn to read.

### The Public Library Finance Act (PLF)

The purpose of the law is “to assure an adequate level of public library service. . . [and] provide stable financing through a combination of state and local revenues. . .” The Public Library Finance Act commits the state to a role in funding local public library service. The Public Library Finance Act is administered by the California State Library. Funds are allocated annually to eligible local libraries from the law’s Public Library Fund. Cities, counties, and special library districts can use the state allocation for general library purposes. Cooperative library systems are not eligible for PLF allocations under PLF.

PLF provides a per capita award to all public libraries that meet the maintenance-of-effort requirement. The amount provided depends on the annual state appropriation and the total population served by eligible libraries in a given year. For example, if all public libraries had been eligible for PLF funds in the 1997/98 fiscal year, each library would receive \$.579 per capita for each person in its jurisdiction (\$18,870,000 State appropriation divided by 32,590,190 people). Almost all public libraries meet the annual maintenance-of-effort requirement needed to qualify for PLF funds.

The principal requirement libraries must meet is maintenance-of-effort, keeping the local appropriation level at least at the same amount as that of the previous year. Waivers of the maintenance-of-effort requirement may be obtained for libraries whose funding problems can be traced to certain specific legislative acts or to the effects of Proposition 218.

### Federal Funding Sources

Supplemental federal funding is available for use by individual public libraries and cooperative library systems if grant applications are made and eligibility requirements met.

The federal grant program available only to libraries is the Library Services and Technology Act (LSTA). The predecessor of this Act was the Library

Services and Construction Act first enacted in 1956. It is the primary source of supplemental federal funding for California public libraries and systems.

### **Library Services and Technology Act (LSTA)**

The purpose of the Act is

1. To consolidate Federal library service programs;
2. To stimulate excellence and promote access to learning and information resources in all types of libraries for individuals of all ages;
3. To promote library services that provide all users access to information through state, regional, national, and international electronic networks;
4. To provide linkages among and between libraries;
5. To promote targeted library services to people of diverse geographic, cultural, and socioeconomic backgrounds, to individuals with disabilities, and to people with limited functional literacy or information skills.

LSTA is administered at the federal level by the U.S. Institute of Museum and Library Services and at the state level in California by the California State Library. The majority of the funds are allocated to the states to establish and enhance electronic linkages among libraries; electronically link libraries with educational, social, and information services; assist libraries in accessing information through electronic networks; encourage libraries in different areas, and encourage different types of libraries, to establish consortia and share resources; pay costs for libraries to acquire or share computer systems and telecommunications technologies; and target library and information services to persons having difficulty using a library and to underserved urban and rural communities, including children (from birth through age 17) from families with incomes below the poverty line—in short, grant-funded projects focus on technology, resource sharing, and services to underserved populations.

Individual public libraries and cooperative public library systems, as well as other types of libraries and library consortia, may submit grant

applications to the State Library for limited-time demonstration projects, pilot projects, and “seed” money to initiate new services. The State Library prepares a long-range state plan for the use of LSTA funds for federal approval. The state policy and program documents are developed by the State Library with the advice of the library community and the California State Advisory Council on Libraries. The California Library Services Board functions as this council.

LSTA also funds National Leadership Grants or Contracts for training, research, demonstration projects, preservation or digitization, and model programs demonstrating cooperative efforts between libraries and museums and are administered directly by the U.S. Institute of Museum and Library Services in Washington, D.C. For information concerning this program, contact with that agency is advised.

Other federal grants that may be used by libraries are available to local governments. Examples are Community Development Block grant funds and grants from the National Endowment for the Humanities.

### **Non-Government Supplemental Library Funding Sources**

While adequate library funding is the legitimate and primary responsibility of government, most California libraries have sought and use some forms of non-government grants and gifts for library enrichment. Libraries may use such additional support to: acquire materials and equipment that the library otherwise would be unable to obtain; facilitate educational and promotional activities; and support special projects and activities.

Non-government supplemental funding sources include:

- Friends of the Library
- Library foundations
- Legacy endowments
- Memorials and gifts
- Business and private foundation grants and/or support
- Civic organizations, service clubs, and individuals

Consultation with the jurisdiction's legal counsel, as well as with its governing body and policy administrators, is important whenever non-government funding sources or gifts for the library are concerned.

## **Legal Constraints**

Two major areas in which legal constraints affect library service are (1) the overall Proposition 13 requirement of a two-thirds vote to enact a special tax (as previously discussed), and (2) the prohibition on libraries against charging their residents fees for basic services. These constraints affect all cities, counties, and special districts.

With the serious decline in revenue for libraries, the definition of basic services has been called into question by many local government entities. Borrowing print materials and receiving an answer to a reference question from a staff member in the library where the question is asked have traditionally been considered basic services. However, with the proliferation of expensive online resources, using that source to answer a reference question continues to be debated as a for-fee service. The California and American Library Associations have been the venue for much discussion regarding what constitutes basic services and for which services a charge would be appropriate. Both the Public Library Association, a division of ALA, and the California Library Association have issued statements regarding fees

for public libraries that delineate certain values, principles, and guidelines. Both statements make the point that each public library must make its own decisions about fees.

The above represents only some of the legal constraints under which libraries operate. Library boards should always be aware of the legal constraints for their particular library and seek legal guidance locally. The State Library maintains a web site of California Laws directly affecting libraries.

## **Library Board Operational Expense Budget Funding**

For the library board's own operational expenses, the funding source is the city, county, or special library district that the board serves. Library board budgets may include funds to permit board members to attend key seminars, meetings, and conferences. Some library board budgets include funds to support trustees' memberships in the California Library Association (CLA), the California Association of Library Trustees and Commissioners (CALTAC), the American Library Association (ALA), and the American Library Trustee Association (ALTA).

System advisory board budgets for operating expenses are included in the cooperative library system annual financial plans and budgets.



## Chapter 3.

# Legal Duties, Liabilities, Rights

Library board members have an obligation to understand the legal duties, limitations, and accountability requirements which laws place on the board as a public body and on members as public officeholders. Trustees should be aware of consequences resulting from failure to obey these laws, understand how to avoid liability, and know the general rights of individual board members. All should be reviewed thoroughly at board orientation meetings scheduled for new members. There should be periodic review sessions for all members.

Most laws affecting library boards, public libraries, and cooperative library systems are state laws, contained mainly in the California Government Code and the California Education Code. Only charter cities and counties may establish other duties and liabilities for library board members in their local jurisdictions.

The board, as well as individual members, should not hesitate to seek expert assistance and legal counsel for clarification or advice. The primary source of information concerning laws and legal positions is the office of legal counsel in the board's operating jurisdiction. Other sources of information include: the Department of Justice; the Office of the Attorney General of California; the California Fair Political Practices Commission; and the California State Library. **California Library Laws**, compiled by the California State Library, contains state laws relating to libraries and library boards.

It is vital for board members to keep informed about new laws, as well as changes in applicable existing laws. The library director is an important resource for such information. Boards may also wish to seek clarification from the jurisdiction's legal counsel if there are questions about conflicting laws or ordinances, or about any changes (such as policy, administrative, or personnel practices) that are not formally detailed by law or ordinance. Upon legal advice, the board

may ask that written clarification be made part of the jurisdiction's official records.

Although such last resort action is not ordinarily necessary, an administrative library board may employ its own legal counsel. (Before doing so, the board needs to ascertain that its operating budget provides for outside consultant fees.) Some administrative boards have found it necessary to obtain outside legal counsel when, for example, a city attorney appeared to be in conflict with the library. However, before any such drastic action is taken, every effort should be made to resolve a problem amicably.

### Duties of Public Officers

As soon as library board members take the oath of public office, they automatically assume legal duties and responsibilities. (Even without a formal oath-taking, these duties automatically attach by virtue of the individual's act of acceptance of office.)

Duties common to all public officeholders include:

- Accepting the office with its powers and obligations
- Obeying local, state, and federal laws
- Good faith to constituency
- Diligence
- Managing property of the constituency

### Other Duties of All Library Board Members

A trustee is a public officer who performs the role of a fiduciary for the citizens and taxpayers of the government jurisdiction that is served. As such, a trustee has a special relation of trust, confidence, or responsibility in certain obligations to others.

Members of all library boards perform both ministerial and discretionary duties.

- A ministerial duty is one that is absolutely certain and imperative. For example, meeting and acting as prescribed by law.
- A discretionary duty demands the exercises of reason, and determination with discretion whether, or how, to act. For example, deciding to erect or purchase a library building.

Six types of duties are common to both advisory and administrative boards:

1. Legislative Responsibility
2. Policy Establishment
3. Planning
4. Evaluation
5. Public and Community Relations
6. Advocacy

This chapter focuses on the legal duties, liabilities and rights of all members. The other categories are discussed in following chapters.

## **Duties Specific To Administrative Library Boards**

Three additional types of duties apply to administrative library board members, also discussed in following chapters:

- Personnel Selection
- Financial Planning
- Governance

## **Ralph M. Brown Act Requirements For Open Public Meetings**

All library board members should be familiar with the state's Ralph M. Brown Act (open public meeting law; for further information, see California Code starting with Sec. 54950.5), which governs the scheduling and conduct of meetings. The most important provisions deal with agendas and public participation.

## **Requirements of Other Laws and Policies**

Other state laws, as well as some charter city charters, ordinances, and policies, establish additional legal duties and accountability requirements with which library board members and libraries must comply.

## **Agendas of Meetings**

In an effort to foster the public's right to know, the Brown Act has many agenda and notice requirements. At least 72 hours prior to a regular meeting, and at least 24 hours in advance of a special meeting, the agenda for the meeting must be posted. The agenda must contain a brief description of each item to be discussed. At regular meetings there are several limited situations that permit items to be discussed that were not listed on the agenda, but triggering these exceptions rarely occurs. At special meetings, no business may be conducted that is not listed on the agenda.

## **Public Participation**

Every agenda must provide an opportunity for the public to address the board on items on the agenda before the board makes a decision. In addition, at regular meetings the board must provide an opportunity for comments on any item under the subject matter jurisdiction of the board. If a person raises an issue that has not yet come up for consideration, the board may discuss it but may not take any action until the item is scheduled on an agenda.

Regulations may be adopted concerning public comments, such as establishing procedures and specifying time limitations. Individuals may not be prohibited from criticizing policies, procedures, programs, or services, but the board may prohibit comments that it believes to be slanderous or which may invade an individual's personal privacy.

## **Minutes of Meetings**

The Brown Act does not specifically address minutes, except for emergency meetings. However, it is important that minutes be taken of every regular and special board meeting. Each board must review and approve by majority vote the minutes of all meetings. The minutes should include a notation of a member's abstention in a vote on any issue and the reason stated (such as disqualifying oneself due to a possible conflict of interest). The file of approved minutes should be available to the public.

## **Board Bylaws, Policies, and Procedures**

State general law, and in most cases charter cities/counties, require or permit library boards to



establish bylaws for the control and conduct of their own affairs and procedures. These bylaws generally include rules for conduct of meetings, agendas, election of board officers, and methods of revising bylaws and regulations.

### Board Officers

State general law, and in most cases charter cities/counties require board selection of a president or chairperson. Some jurisdictions also require board selection of a president (or chairperson) pro tem and a secretary.

### Annual Reports

The California Education Code requires library boards and/or librarians for public libraries to report certain information annually to the State Librarian. This is in keeping with the California State Library's function as statewide clearinghouse for library information and the State Library's charge from the state legislature to maintain comparative studies of library conditions in the state. Statistical data from those reports are tabulated in **California Library Statistics**, published annually by the California State Library. Most charter city/county regulations or ordinances also require an annual report from the library board to the local governing authority.

### Personal Economic Interests Statements

The requirements for an individual library board member to file a Statement of Economic Interests in compliance with the Conflict of Interest Code of the California Political Reform Act were discussed in Chapter 1.

### Confidentiality of Library Records

Since 1981 the California Government Code has provided that all library circulation and registration records kept on borrowers of library materials are confidential. A court order is required for their disclosure. The law does not exempt from disclosure the records of fines imposed on borrowers.

### Legal Liabilities For Trustee Violation of Trust

As public officeholders, all library trustees should familiarize themselves with the consequences they may expect for their failure to obey the laws. Basically, they are liable for actions they take, and for actions they fail to take, including the failure to stop others acting in violation.

For violation of a trust or fiduciary duty, the trustee may be legally enjoined from acting as a trustee, suspended or removed from office, made to pay civil damages, criminally fined or convicted, or sentenced to a term of imprisonment.

Areas of legal liabilities are listed below. Of necessity, the discussion consists of generalizations. It should not be considered a definitive exposition of the law. The examples given do not indicate their specificity to advisory or administrative type boards having different functions.

1. Errors or mistakes in exercise of authority
2. Acts in excess of authority

The library board and individual trustees have no authority that is not specifically granted. Trustees can be sued if they or their employees act outside the scope of their given authority—for example, censorship or dress codes for employees.

3. Malfeasance, such as fiscal misappropriation or acceptance of a bribe.
4. Nonfeasance

Trustees can be held liable for failing to act when they should have acted, either to do something required by law or to stop actions that are illegal.

Examples:

- Failure to correct violations of the Brown Act, and with intent to deprive the public of information, is a misdemeanor. (Further, the jurisdiction can be enjoined by the courts from violating the Act.) If there is deliberation without action, the criminal penalty is not applicable, only civil proceedings are available.
- Failure to act ministerially as prescribed by law; library boards are liable if such failure injures any person or group.
- Failure to stop library patrons from making duplications of cassettes in violation of the copyright law.
- Failure to meet as regularly scheduled. Although this seems innocuous enough, it may result in a board being held liable if that no-show occasion causes some person physical or financial injury. Trustees should be aware of the procedure specified

for canceling or changing the date of a board meeting.

- Failure to complete required reports or governmental projects or fulfill any contract as agreed upon.
- Failure to file, within 30 days of assuming office, a personal Statement of Economic Interests in compliance with the Political Reform Act (if the library board has been designated in Conflict of Interest Code of local jurisdiction). Penalty for late filing is \$10 per day up to \$100.

#### 5. Negligence

Trustees can be held liable for their own negligence, or the negligence of a librarian whom they supervise.

Examples:

- Unsafe buildings and grounds.
- Failure to supervise funds.
- Insufficient interest accounts.
- Loss due to depositing funds over the maximum amount insured.
- Failure to make proper investigations when there is reasonable doubt that adequate management systems are being maintained.

#### 6. Intentional tort

Trustees can be liable for statements made in haste, or for angry actions of one of their own members or the library staff.

Examples:

- Libel, assault, slander.
- Improper discharge of an employee.
- Theft.
- Interfering with the property of another.

#### 7. Unintentional tort

Trustees can be held liable when a member of the board or the library staff, in good faith, makes a statement but is mistaken in judgment or identification, such as accusing a person of committing a crime.

#### 8. Conflict of interest

Trustees can be held liable for making, participating in, or attempting to influence any governmental decision that will affect their financial interest tangibly or intangibly.

(Trustees have the legal responsibility to disqualify themselves from discussing, voting, or taking any action in any board action in which a possible financial conflict of interest exists.) The Political Reform Act and related regulations establish threshold dollar amounts that are presumed to result in a conflict. Other provisions of the law prohibit contracts motivated by self-interest. Trustees should not condone other trustees' conflicts of interests. For violation, the trustee can be subject to fines, imprisonment, and loss of license or disbarment. (See also the chapter on Statutory Authority.)

Examples:

- Voting to let a contract to a company in which the trustee owns stock, even if the company makes the lowest or best bid.
  - Depositing money in a bank in which a trustee is a bank trustee or employee.
  - Allowing unauthorized payment of trustees.
  - Writing specifications so only a favored contractor is eligible.
  - Using and/or compensating an attorney on the board to do legal work for the library and/or library board.
  - Using and/or compensating an accountant on the board to audit or check the library and/or library board's finances.
- #### 9. Acts in contravention of statutory direction
- Trustees can be liable for failure to act in compliance with laws or administrative rules.
- Examples:
- Failing to follow rules, regulations and bylaws.
  - Purchasing property without bidding.
  - Tailoring specifications to a specific bidder.
  - Improperly reimbursing trustees and employees.
  - Authorizing payment of improper expenses.
  - Making speculative investments outside the scope of authority.
  - Engaging in arbitrage (the act of borrowing money at a low rate of interest as a library, then reinvesting it at a higher rate in commercial establishments).

## Trustees' Defenses To Lessen Their Liability

There are several precautions individual trustees and the board should take to lessen the possibility of personal liability. (The following are generalizations, should not be considered infallible, and are not necessarily in priority order.)

### Defenses For The Individual Trustee

1. Do not hesitate to seek legal counsel for clarification and advice.
2. Consider the need for indemnity insurance designed for public officials.
3. Be active and encourage all other trustees to be active by attending meetings, studying, questioning, voting on all issues, and monitoring actions taken.
4. Read the minutes and make corrections. Be certain your vote is properly recorded, and minutes of each meeting are maintained and available to the public. If not in attendance: read the minutes before the next meeting; make any corrections appropriate; request in writing (sent registered mail) that the secretary add a note showing how you would have voted. Explain your position at the next meeting.
5. Vote "No" on proposed actions if you feel you have insufficient information on which to base an opinion, or if you believe the proposed actions are illegal or improper. (Absenteeism or abstention from voting is probably not sufficient to protect a trustee from liability. An abstention may be considered as a "Yes" or a "No" vote, depending on the board's bylaws.)
6. Be scrupulous concerning personal conflicts of interests. Do not condone the conflict of interests by others. If conflicts are occurring, write a letter of protest for the record.
7. Show strict regard for all Brown Act provisions in all meetings board members hold and meetings you attend where library or board business is discussed. Do not condone violations.

### Defenses For The Total Board

1. Verify liability insurance for the board and the library. Ask the jurisdiction the board serves to indemnify the board and/or include the board and library in a blanket liability insurance

program and liability bond policy. Most government entities have risk management practices that cover library operations.

2. Seek clarification or advice from the jurisdiction's legal counsel concerning any controversial issues and all legal matters.
3. Take all board actions by majority vote. Take actions through parliamentary procedure with recorded motion, second, and vote; allow time for member discussion in previously publicized meeting open for public participation. Make certain all action is recorded in minutes that are maintained and open to the public.
4. Adopt bylaws and policies that are maintained in writing, reviewed annually, and on file for the public. Follow those board-adopted bylaws and policies.
5. Scrupulously carry out all Brown Act provisions concerning any meeting of board members, as well as meetings the board attends where library or board business is discussed.
6. Refuse to allow the existence of conflicts of interest on the board.
7. Urge regular attendance by all members. Enforce any existing legal rules or regulations requiring a member's resignation or forfeiture of office for a stated number of unexcused absences. Consult the appointive authority concerning a member's extensive absences without reasonable cause.
8. Encourage all members to be active participants, studying, questioning, voting on all issues. Monitor committees to ensure they are functioning and providing reports.
9. Keep the governing body of the jurisdiction informed of board actions.

## Individual Rights of A Library Trustee

Each trustee has a number of important general rights including the following:

- To participate in the board's deliberations and actions to the same extent as any other member, except for the additional authority bestowed by the board upon its officers.
- To be informed of board business scheduled for consideration at a specific meeting in sufficient

time to permit personal study and review, and presentation to citizens before action is required.

- To request changes in minutes before they are approved in order to assure that they more accurately reflect actual events.
- To request additional information on any matter being considered, and, before a vote is called, to personally question anyone who appears before the board.
- To express opinions concerning issues or proposed items of business before they are brought before the board for vote, except when debate time has been limited by board consent in advance.
- To bring any concern about issues within the board's legal purview to the attention of the entire board, whether that concern is a personal one or originates from the public.
- To ask the chairperson to clarify the way in which a meeting is being conducted at any time.
- To request that a vote be taken in a specific manner, such as roll call, voice or show of hands, if not inconsistent with the board's written bylaws, rules, or policy.
- To request that the minutes record a trustee's opposition to any action approved by a majority vote, or a trustee's support of any action disapproved by a majority vote.
- To move, with stated due cause, to defer action on any item of business until a later date.
- To remain silent.
- To vote "No."
- To abstain from voting with reason explained, or to disqualify oneself from voting with reason explained.
- To seek fellow member support during the meeting for or against any issue brought before the board for a vote.
- To seek reconsideration (within the board rules) of any action previously taken.
- To seek support inside or outside the board to review any action previously taken.
- To request placement on an agenda of any relevant business within the board's legal purview for the board's consideration.
- To seek legal counsel for questions, clarification of any issue, or review of action taken by the board.
- To request a summary of the policies and procedures that the board has developed since its establishment.
- To review the file of minutes recording previous meetings of the board.
- To obtain a complete and current list of board members and their library board voting records.
- To ask questions and make recommendations relating to effective organization of the board or completion of its business.
- To request, with due cause stated, that an informal review of the fiscal affairs of the board or of the library be made.
- To carry out one's duties (and to assist the board in carrying out its legal functions) with the degree of independence from, or cooperation with, the library director and other jurisdiction officers that the law specifies.
- To resist improper coercion, collusion, domination, or legally unauthorized takeover of the trustee's and the library board's legal functions.

All trustees also retain the rights of any citizen. They include: participating in political activities of their choosing at any level of government and remaining silent concerning personal political affiliation.

## Chapter 4.

# Effective Board Organization

Any library board must function effectively itself before the taxpaying public will judge it capable to serve as administrator or advisor for the complex, big community business that is today's public library. Ideally, trustees provide representation for the varied group interests in the community. But each trustee's commitment to put service to the total community above any group interest is a vital prerequisite for effective library board organization and operation. To serve effectively as an official public body, the trustees must organize themselves so they can function smoothly and professionally as a group, all working knowledgeably and confidently within clear and agreed upon operational procedures. The library board must be prepared to devote its time and attention to the primary reason for its existence—administering or advising to provide library service matching the public's needs.

### Attributes of Responsible Trustees

The following attributes are the ideal qualities that can help the trustee keep the library a top priority in the community:

1. Trustees are believers in libraries and library service.
2. Trustees are library users.
3. Trustees are public relations experts promoting the public's awareness of public library services.
4. Trustees are informed persons, especially as to how the library functions.
5. Trustees are idealists, who insist on high standards.
6. Trustees, in spite of being dreamers, are also realists, knowing that not everyone in the community has or even wants a library card.
7. Trustees are evaluators, constantly asking, "Is this good enough?"
8. Trustees are joiners, goers, high energy people, and supporters of causes, especially of library causes.
9. Trustees are community representatives and must keep informed about the community.
10. Trustees are Politicians ... with a capital "P!" They must know the environment for getting things done.
11. Trustees are advocates for libraries.
12. Trustees are concerned about what services the library can provide for the community.

Inherent in these attributes is a readiness to devote time and effort to the duties of trusteeship.

### Essentials for Effective Board Organization

Through time and experience, public boards, corporate business, and civic organization boards have found that certain tools make the difference between commendable effectiveness and counterproductivity. Each of these tools works for both advisory and administrative library boards:

1. Trustee Manual for each trustee
2. Board bylaws
3. Board operating policy
4. Clearly defined board officer duties
5. Provision for committees with clearly defined roles and procedures
6. Board records/board minutes file
7. Conduct-of-public-meeting procedure with an advance, written agenda for each meeting
8. A code of parliamentary procedure
9. Board goals and objectives
10. New board member orientation program
11. Board member continuing education program
12. Board education and library resource file



13. Clearly defined policies for working relationships with key individuals and groups such as library director, library foundations, Friends of the Library.
14. Public and community relations and library advocacy program

## **Importance of Trustee Manual for Each Trustee**

A well-organized Trustee Manual for each trustee is a valuable tool for smooth board operation and knowledgeable participation by all. One copy kept by the chairperson or secretary does not permit each trustee to use it for quick reference either during an at home study period in preparation for a meeting or during a meeting. Copies for new trustees should be reviewed during the orientation meeting to expedite effective participation in board meetings.

A board may want to produce its own manual relevant to its local operation. However, every Trustee Manual should contain key information including: the enabling legislation establishing the local board and its authority; legal duties of each trustee; board bylaws and policies, goals and objectives; current board members and terms of office; current board officers, committees, and responsibilities; a clear definition of the duties of the library director, and a clear definition of the role of trustees in relationship to that of the library director; library mission statement, current library goals and objectives; and library operating policies.

Individual boards may feel it important to include other information. Depending on individual board choice as well as the scope of library operations, some boards have relatively simple manuals while others have compiled complex ones.

It is important to have an established policy for an annual review and update of the Trustee Manual by the entire board or by a special committee created for that purpose.

## **Necessity for Board Bylaws**

All boards should have written bylaws to control their own affairs. Bylaws are the internal rules that establish board structure, organization, and operational procedures. They should be

thoughtfully developed and adopted by a two-thirds vote after advance public notice and opportunity for comment. Review by the jurisdiction's legal counsel before adoption is wise. Some library board bylaws are required by law to be approved by the governing body of the jurisdiction.

Bylaws are essential management tools, making it possible for the board to carry out its legally mandated functions efficiently, expeditiously, democratically and provide a way to inform the public of its standard operating procedure. Failure of a board to establish written bylaws (operating instead through informal and customary practices) can result in misinterpretations and disagreements, time-consuming meetings, legal errors, and even lawsuits. The laws providing for the establishment of library boards also establish their functions; however, generally these laws are phrased in broad terms, leaving detailed organization and procedures to be developed by the boards.

As an official public body, the library board is expected to have such rules established for orderly, public meetings. California's Ralph M. Brown Act, enacted to insure such open, public meetings, states that a public body "must provide by resolution, bylaw or rule, as appropriate to that body, for the time of holding regular meetings."

A copy of the bylaws should be available to the public and on file with the clerk of the jurisdiction. The existence of written bylaws is a board defense against liability.

Library board bylaws typically provide for:

1. Regular meetings open to public: Date and time; place; other requirements including advance written agenda and advance public notice.
2. Special meetings open to public: Method for calling; other requirements including advance written agenda and advance public notice.
3. Quorum: What constitutes a quorum.
4. Member attendance policy: Provision for excused absences; any attendance enforcement provisions for unexcused absences (in accord with jurisdiction appointive authority).
5. Board officers: Titles; duties and powers: terms of office.

6. Election procedure: Nomination, election date and process; procedure for filling vacancies during term.
7. Standing committees: Title and function; member selection procedure, duties, and reporting procedure.
8. Special committees: Member selection procedure, duties, and reporting procedure.
9. Conduct of board meetings: Responsibility for advance written agenda; procedure for placing items on agenda; order of business; statement of authority for parliamentary procedure (such as the current edition of **Robert's Rules of Order Newly Revised** or other board-accepted authority); provision for public comment (written or oral). It may be helpful for the preparer of the agenda to allocate a time frame for each agenda item, as well as to indicate action items.
10. Budget: Procedure for preparation and timetable.
11. Required reports: Definition; procedure for preparation and any approval procedure; dates due.
12. Bylaws and operating policies: Procedure for adoption; frequency of review; amendment procedure; fulfilling public notice requirements.

Bylaws should be subject to regular review, and amendment, if needed, in order to improve constantly the board's self-management and efficiency.

### **Need for Board Officers with Clearly Defined Duties**

All library boards recognize the need for officers with clearly defined duties and powers for each office, all in writing and well understood by everyone.

Library boards traditionally elect the following officers:

1. Chairperson or President
2. Vice-Chairperson or Vice-President
3. Secretary (sometimes the library director, by agreement with the board, may serve; or the governing body of the jurisdiction may provide secretarial service)

### **Provision for Committees with Clearly Defined Roles and Procedures**

Some library boards use committees; some do not. There are considerations to be given both for and against the committee system.

Those favoring committees feel: 1) committees can save the total board discussion time at meetings because a committee can investigate and thoroughly discuss any issue, then present all the pros and cons plus written recommendations (if requested) to the total board for its decision; 2) committees can help board members to develop more in-depth expertise in specific issues; 3) committees may be a way to involve all Board members, plus other community members, and tap expertise, such as Friends of the Library.

Those who oppose committees feel: 1) committees are a time-consuming approach to what can just as effectively or more quickly be done by the entire board, especially if the board itself is small; 2) committees can become another burden for the board chairperson and board to work with and work through; 3) committees may become cliques that, in effect, manage the board, possessive of their areas of focus with a tendency to override any and all other board members' expertise.

Clearly defined committee roles and procedures should be included in the bylaws. Committees are advisory, unless other powers are specifically delegated by the total board. Committees do not vote to adopt and/or to commit the board, the library, or the governmental jurisdiction to any action or policy. Neither do they act as spokespersons for the board, nor take any other independent action unless authorized in advance by the total board. Written committee reports should be distributed before a board meeting to permit member study.

### **Necessity of Board Records and Minutes File**

A complete and accurate file of board minutes, including supporting material and other important documents and correspondence, is necessary for any public body and recommended for board operational effectiveness. The records also are

crucial for legal purposes (especially to lessen trustees' legal liability) and for future board reference.

The records need to be readily available to all board members in the library or library office, not kept in the home of the chairperson or secretary. Public records must be available to the public.

## **Requirement of Advance, Written Agenda**

According to the Brown Act, the agenda must be available to the public at least 72 hours before a regular board or commission meeting, and at least 24 hours in advance of a special meeting. Be sure the board or commission members receive the agenda in time to give adequate consideration to each item. The agenda should specify the time and location of the regular meeting and be posted in a location that is freely accessible to members of the public.

## **Responsibility for Preparing Agenda**

Responsibility for preparing the agenda is a most important responsibility. Generally, the agenda is prepared by the chairperson, or at least has the approval of the chairperson. The chairperson's advance consultation with the library director, or perhaps preparation of the agenda in consultation with the library director, contributes to a healthy working relationship.

## **Importance of Adherence to Parliamentary Procedure**

A library board's bylaws declare that the board will utilize parliamentary procedure to conduct its meetings. But to do so requires a commitment plus a general understanding of the basics of parliamentary procedure by all. The purpose of parliamentary procedure is to permit the group to transact business speedily and efficiently, assure an orderly meeting, and protect the rights of each individual. The procedure provides a mechanism whereby: 1) only one subject may rightfully claim group attention at one time; 2) every proposal properly presented for consideration is due a free and full debate; and 3) the will of the majority is determined in orderly procedure, while preserving the rights of the minority. While parliamentary

procedure is meant to facilitate meetings, it is not intended to become an obstacle itself.

A current edition of **Robert's Rules of Order Newly Revised** (or the parliamentary source the bylaws cite) should be readily available at each meeting.

## **Need for Orientation Program for New Trustees**

Much already has been said about the importance of a new trustee orientation program. An effective program: 1) begins immediately following appointment or election and before the new trustee attends a library board meeting; 2) immediately provides the new trustee with a copy of the library board's Trustee Manual as a key orientation guide; 3) includes an orientation session; 4) extends beyond the new member's first board meeting.

Early orientation of the new trustee helps the library board keep up its action momentum instead of marking time while the new member struggles to figure everything out alone. It helps prevent misunderstanding that may have long-lasting effects. It means that all board decisions are based on full-member knowledge.

If new trustees are to participate quickly and knowledgeably in decision-making, they need to know before the first board meeting how the board operates; its goals, objectives and policies; what decisions it faces immediately; what and why plans and actions have been formulated in the past; laws affecting both board and library; and resources available. New trustees also need to know the library goals and objectives, organization, and operating policies.

Information concerning the cooperative library system of which the local library is a member is useful. It is important to place the local library in perspective with other libraries, to bring into sharp focus the state and national library picture, and define the challenges all libraries face.

## **Value of Trustee Continuing Education Program**

Job-related continuing education is considered essential today by business and government



executives, educators, and professionals. It is standard practice for library staff members. Formal or informal programs provide updated information and learning opportunities to enhance performance. Such continuing education programs also are invaluable for library trustees who recognize they too have a responsibility: to keep fully apprised of current developments, and constantly to advance their expertise.

A well-organized continuing education program for members, including attendance at conferences, workshops, and seminars, and membership in state and national trustee and library organizations should be standard operating procedure for all library boards. It should be planned for, and budgeted for, when possible.

## **Significance of Trustee Resource Bookshelf**

For members' study as well as for reference, a Trustee Information and Resources Bookshelf should be created in the library in cooperation with the library director. (Trustees also should be alerted to new publications in their field of interest.) Such a bookshelf may also prove useful to members of the local jurisdiction governing body and staff, potential library board members, and others in the community interested in the library. Libraries are always willing to share samples of their bylaws, policy manuals, and other organizational documents.

## *Chapter 5.*

# **Systematic Planning Process**

Planning may be viewed as the process of controlling change, rather than being controlled by change. Planning is the heart of library board responsibility. Without systematic planning for the future, a library board may cling to its past ignoring the changing scene; or, without sufficient study, may respond too quickly to a community group's skillful presentation or to an individual's dominating personality.

As Nancy A. Van House, School of Information Management and Systems at the University of California at Berkeley, stated at a CALTAC Regional Workshop: "the public library needs to understand why its community supports it. We cannot be all things to all people, so we need to find out what we do well and whom we should be serving. We have to choose what we do—set goals, objectives, and priorities—and plan!"

Planning is two-phased: (1) planning for the library board itself; and (2) planning for the library (in the case of system advisory boards, assisting in the planning for the cooperative library system which serves multiple libraries in a regional area). Planning for the board is essential to determine its own goals, objectives, priorities, policies, and proposed budget. It is important to match the board's goals, priorities, and action plan with the library's, so all are working in tandem for the overall cause—effective and responsive service to all the people in the community. In the process of planning for its own operations, the wise board never neglects effective relationships with the library director.

All phases of planning for the library should involve library boards, in working partnership with the library director and staff, because the trustees represent the community, serving as liaison with the governing body of the governmental jurisdiction. Their input and involvement, even as advisory boards, adds depth and weight to strengthen conclusions drawn and decisions made.

Their input, their involvement, and their subsequently heightened understanding of the reasons behind decisions make the trustees even more effective advocates for the library.

As a means of reviewing the existing planning process, trustees for a public library or system advisory board members might ask the following questions:

1. What are the long range and the short range goals for our library board? For our library? For our cooperative library system? Is there a plan of action realistically designed to achieve those goals within any specific time frame?
2. Who is involved in developing these goals and action plans? How are they involved?
3. What sources of information are used as a basis for planning? How much of the planning is based on fact, and how much on assumptions? Is the information current? What additional sources of information would be helpful? Do we need to make some factual survey or study to provide additional vital information that we presently are assuming?
4. Periodically as we proceed, do we take the time to evaluate our goals and plan of action to assess progress and relevancy in light of changed needs, barriers, or other circumstances? What dictates our change? Facts? Feelings? Assumptions?
5. Do we commit our goals and plan of action to paper? What system do we follow to share our planning decisions with the administrative body of the governing jurisdiction and with the people in the community?
6. Do our goals and plan of action consider not only services to be provided, but financing, personnel, and plant facilities or other materials required?

7. How do we use our goals and plan of action in the process of planning the proposed library budget?
8. How do our goals and plan of action mesh with our established library policies (such as, book selection and circulation policy)?
9. What is the community image of our library board as the overall guiding force in determining the library's role and its service? Is the community image justified? Or unjustified?

If the library board's image merits changing, how can a trustee, or how can the board move to change the image?

Planning decisions have long-range impact. Research study after research study overwhelmingly shows that the key to success for any board or organization is how effectively it can plan a visionary yet reasonable and workable course of action leading to specific, predetermined goals.

## Chapter 6.

# Policy-Setting and Budget-Making

Library policies are essential for the library board of every library regardless of size and complexity of service, or the number on the library staff. As defined in Webster's Dictionary, *policy* is "a definite course or method of action, selected from among alternatives and in the light of given conditions, to guide and determine present and future conditions."

For libraries, policies are crucial to consistency and equity of library service; sound management; planning; public information, understanding, and ease of library use. It is helpful to consider policies as part of planning to achieve desired objectives and goals, and as part of the management system.

Library policies are each library's formal covenant with every individual in the community on vitally important fundamentals. These include: the library's mission; philosophy; goals and objectives; individual freedoms, such as the freedom to read; uncensored library selection of books and materials; privacy protection for borrower library records; user suggestion and complaint procedures; public rights to library access; availability of services and facilities; library programs and library operations.

Of all trustee decisions, library policy decisions generally have the most frequent and sometimes long-range impact on members of the community. They can be controversial because they relate to individual rights, freedoms, and privacy. The policies should be in writing, and should be readily available for the public's information. Policies are equally essential for every cooperative library system which the system advisory boards serve.

The trustee's role in the development and application of library policies is a major one because library boards exist to represent the people and to provide vital guidance to local government and library staff in management, planning, and evaluation functions. Generally, the

development of policies is a joint responsibility of the library board with the advice and close cooperation of the library director. Developing library operating procedures (methods for every step in the library's operation) usually is considered an administrative responsibility of the library director.

Virginia G. Young, a past president of the American Library Trustee Association, wrote,

Devised as it must be to meet immediate needs, policy also necessarily has a far-reaching effect, and this fact should always be kept in mind by the board members as policy is worked out and adopted in various areas. Policies determined by the library board set the conditions of the library's day-to-day operation and its program through the years, and policy making demands the best in thought and planning from every library trustee.

### Individual Trustee Commitment

Library policy development merits a serious commitment by trustees:

1. To give adequate time and special attention to all policy deliberations.
2. To satisfy themselves, before voting on policy adoption, that the policy proposed is clearly stated, is both fair and reasonable, and that all policy ramifications are fully understood.
3. Not to rubber-stamp, or to condone the hasty adoption of an unreasonable, unfair, and unclear policy, or a policy inadequately researched.
4. To be prepared to actively support and/or to defend as reasonable and necessary the policy they voted to adopt; to be prepared to explain its rationale and terms.

5. If no Library Policy Manual currently exists, to take the initiative to have such a manual compiled as a vital procedure.
6. If there is at present no regular policy review, to take the initiative to make reviews regular procedures.

## Types of Policies Considered Important

There are two types of library policies:

1. External Policies, which govern relationship of the library to its users (such as the community, governmental jurisdiction, cooperative library systems, other libraries, Friends of the Library, Volunteers, Foundations).
2. Internal Management or Operating Procedures, which govern the management of the library.

Following are the subjects generally included in each type of policy:

### External Policies

- A. Library-user related policies
  1. Hours of operation
  2. Eligibility requirements for library users for services
  3. Selection policies—books and materials
    - a. Responsibility for selection
    - b. Selection standards
    - c. Scope of collection, emphasis of collection and limits of collection, priority setting procedure
    - d. Quality of books purchased
    - e. Materials review procedures for public
    - f. Gifts and special collections
      - 1) Conditions for accepting gifts
      - 2) Disposition of nonusable gifts
      - 3) Conditions for acceptance of items such as art objects and personal property
      - 4) Conditions for acceptance of money, stocks, or real property
      - 5) Use of special bookplates and any other special designations for gifts

- 6) Guidelines for acceptance of such items as religious, political, and sectarian materials
- 7) Conditions for acceptance of historical materials and writings of local authors
- 8) Storage and use of material not designated as an outright gift
- 9) Appropriate methods for solicitation of gifts for memorial purposes
- g. Basis and methods of withdrawing and disposing of materials
- h. Supplying textbooks relating to school curriculum
4. Circulation
  - a. Adoption of Library Bill of Rights and Freedom to Read statement of ALA
  - b. Labeling policy (Consider ALA interpretation)
  - c. Access to libraries for minors (Consider ALA interpretation)
  - d. Challenged materials (Consider ALA interpretation)
  - e. Restricted access (Consider ALA interpretation)
  - f. Sexism, racism, and other “isms” (Consider ALA interpretation)
  - g. Period of time books and other materials may be borrowed
  - h. Book reservation policy
  - i. Books (by type) which can/cannot be borrowed for home use
  - j. Fees for use of books and/or materials
  - k. Fines for overdue, damaged, or lost books and materials
  - l. Charges for damaged equipment or facilities
  - m. Interlibrary loan policies, with periodic review to ensure compliance with state assistance programs in which the library may be participating (CLSA, PLF)
  - n. Direct borrowing by non-residents, with periodic review to ensure compliance with state assistance programs in which

- the library may be participating (CLSA, PLF)
- 5. Procedure for enforcing state restrictions on access to borrowing records (should be easily understood by staff and public)
- 6. Procedure for implementing federal copyright law
- 7. Special program and/or services—such as procedures and participation
  - a. Kinds of reference service to be provided (such as telephone or in-person)
  - b. To whom reference service will be provided
  - c. Scope and depth of service to be provided
  - d. Fees for photocopying
- 8. Internet
- 9. Electronic equipment
- 10. Dial-in services
- B. Community-related policies
  - 1. Mobile outreach service
    - a. Site selection criteria for establishment of branch libraries or mobile services
    - b. Hours of service
    - c. Scope of service
    - d. Eligibility for service
  - 2. Use of library facilities by community groups
    - a. Who may use and for what purposes; responsibility for determining priority
    - b. Hours facilities may be used
    - c. How reservations may be made and/or confirmed
    - d. How reservations may be canceled
    - e. Fee schedule and/or janitorial, guard, or custodial cost
    - f. Food and beverage service
    - g. Insurance responsibility
    - h. Use of library equipment; restrictions; cost; damage
    - i. Exhibits by individuals or organizations
  - 3. Procedure for use of library volunteers

- 4. Procedure for working with Friends of the Library/Library Foundation

### **Internal Management Policies**

- A. Board of Trustees Operating Policy. (Statutory authority; bylaws; board goals and objectives.)
- B. Library organization authority and responsibilities
- C. Department management
- D. Personnel
- E. Finance and business
- F. Property and risk management

The above list of important library policies is not inclusive. Some policies may not apply in every library's situation. Any sample policy, or policy statement developed by another board should be reviewed with great care and carefully tailored to local conditions and needs.

### **Systematic Policy Development**

Development of policies generally is a joint responsibility of the board and library director. Usually, the library director recommends policies to the board based on observed need. But trustees may themselves observe the need for a policy determination in some particular area, and bring it to the attention of the library board and the library director. The library director and library staff may draft proposed policy statements that are then discussed by the board. Suggested modifications then may be proposed for discussion. Notation should be made on each policy to show date of approval, effective date, last review date, and date of change or revision.

Compilation of all policies into a manual is essential. The Library Policy Manual properly contains as introductory pages: 1) the library mission statement; 2) a statement of the library's philosophy that well may include the Library Bill of Rights and the Freedom to Read statement; 3) the library's goals and objectives. For reference and study, each trustee should be provided a copy of the Library Policy Manual, or the policies should be included in each Trustee Manual. The Library Policy Manual also should be readily accessible to the public in the library, available to the community news media, and offered for file at the city hall, county courthouse, or special district headquarters.



A systematic policy development procedure will include:

1. Statement of the problem or condition—past, present, or future—which requires consideration of a policy.
2. Statement of how the proposed policy will contribute to the accomplishment of library objectives and goals; how the proposed policy is consistent with the library mission.
3. Statement of all present policies affected by or related to the proposed policy.
4. Statement of available policy options with analysis of:
  - a. Both short and long range effects.
  - b. Potential positive and negative side effects.
  - c. Estimated dollar cost, plus cost in terms of other library resources, such as staff time, facilities, and equipment.
  - d. Relevant legal ramifications.
5. A draft of the exact wording of the policy statement that is being proposed for adoption.
6. Opportunity provided for public input or comments.

The policy should be:

1. In compliance with laws and policies of the local governing jurisdiction, the state, and the federal government.
2. In the best interest of the community at large.
3. Consistent with the library's mission, philosophy, goals, and objectives.
4. Designed to maximize library services, facilities, and resources for the greatest number of library users.
5. Designed to be fair to all.
6. Protective of the individual rights and freedom of all people.
7. Devoid of politics, prejudice, favoritism, personal preference, pettiness, conflict of interest, or personal gain.
8. A firm foundation for the administration of the library and the staff relationship with the public.
9. Reflective of and/or consistent with best library practices, statewide library goals, Library Bill of Rights, and Freedom to Read Statement.

10. Developed with opportunity for public input or comment.
11. Complete and comprehensive; clear, unambiguous, and easily understood by all, especially the public.
12. Specific as to how public comment, suggestions, or criticism of the policy, its administration or enforcement may be made and will be expeditiously considered.
13. Made readily available for the public's information.

### **New Policy Support Needed**

Virginia G. Young, a past president of the American Library Trustee Association, stresses this point: "Once adopted, a policy should have the support of the entire board, the librarian, and the staff, and it is the board's moral obligation to stand behind the librarian in carrying out policies."

Trustees should staunchly support the library director and staff in enforcement of the new policy. They also should be ready to interpret and support both policy and rationale before any group or individual with questions or concerns. Experience shows that the library's Book and Materials Selection Policy is one that trustees are often called upon to defend.

Trustees should provide public information and promote understanding of the need for the policy and the terms of the policy, planning a specific public information program with the library director. This program might include a news release and/or meeting with media representatives. With a major policy, it might include meetings with community organizations and/or speeches before those groups.

### **Regular Policy Review Important**

A library board should plan a regular, periodic review of all library policies, with revision as necessary. The library board and library director should keep a close tab on the effect and workability of a new policy for some time after its implementation. They especially should be alert for results that were not anticipated, and that might require reconsideration and policy modification. Flexibility when needed is essential. No policy can

be considered cast in stone. Conditions change. People change. Policy needs emerge and dissolve.

## Budget-Making

The budgetary process is fiscal policy-making. A budget is the total dollars-and-cents cost of existing services and of moving the organization forward toward established goals and objectives.

Not all California library boards have the same jobs in connection with the library budget. In fact, their varying library budget responsibilities show clearly the differences in function: 1) between the elected administrative library boards in autonomous special district libraries and library boards in other jurisdictions; 2) between library administrative and advisory boards generally.

Where budgets are concerned, special district libraries have unique responsibilities. The elected administrative trustees of special district libraries have the responsibility for making the final budget allocations themselves, since they receive no money from city or county general funds. The counties in which special district libraries are located collect the taxes for the special districts and disburse them according to the formulas set by the California laws. The respective counties also make allocations of the augmentation funds designated by the state, and the special district libraries must appeal to the boards of supervisors for these funds. (The elected administrative trustees of special district libraries are like other library administrative boards in their responsibility for financial control of budget expenditures throughout the budget year.)

An administrative library board in other jurisdictions has responsibility for: 1) presenting the budget (usually prepared by the library director in conjunction with the board's budget committee); 2) approving the proposed budget; 3) presenting the proposed budget for final approval by the jurisdiction's governing body; 4) financial control throughout the budget year to assure that expenditures are within the budget. Usually, the library board delegates the administration of the budget to the city librarian, however, the library board provides budget oversight and may approve all the bills. If at any time City staff wish to change the budget that is submitted, any changes need to

go to the library board for approval. If the library board does not agree, they can file a variance and try to fight the change at the budget hearings. The final draft of the budget goes to the library board for change or approval before it is sent on to the City.

In contrast, an advisory library board does not have these legally mandated budget responsibilities for the library, and does not have fiscal management control responsibility. (The same holds true for the system advisory boards.) The library director has both budget and fiscal management responsibility. However, the library director usually prepares the library budget with discussion and review by the library board.

Both administrative and advisory library boards have responsibility for the library board budget. It is their function to: develop the budget for the board's operating expenses; present it for final approval by the jurisdiction governing body; and supervise actual expenditures during the ensuing budget year.

As a means of reviewing the existing budget process, trustees might well ask the following questions:

1. What processes are used to develop the annual budget for our library board? For our library? Or for our cooperative library system? How well does the process work?
2. How are the library board budget and the library budget presented to the governing body in our specific jurisdiction?
3. What process does that body use to arrive at an approved budget?
4. What is our role as library advocates in the budgetary political negotiations with the governing body?
5. What is the policy for seeking potential non-governmental sources for library funds?
6. What are our responsibilities in fiscal management?

For both administrative and advisory boards, there are certain essential points to bear in mind during the budget-making process:

1. Most productive and crucial are close and cooperative working relationships with the library director (for SABS, close relations with



the system administrative council) plus clear, mutual understandings of the exact role of each.

2. The give-and-take process of budget discussion and review between the library director and the board (or the system administrative council and the SAB) reinforces the board member's understanding of the services and goals of the library or library system, as well as the cost of each. This discussion also prepares board members to explain, support, or defend the budget if necessary.
3. It is not the primary mission of the library board to see how many dollars can be cut from a budget. Rather, their key mission is to determine what cost-effective programs the library can best offer.
4. The budget most likely to gain final approval is a budget that is precise and justifiable in terms of cost/benefit for the people.

Alice B. Ihrig, a past president of the American Library Trustee Association, stresses:

“Actually, for people who have to hear our pleas, the most difficult is to listen to vague, high-sounding objectives of libraries. A lawmaker is not interested in your grandiose feeling about extension of education to people. ‘He wants to know what are you doing for people? What are you really doing?’ He is saying: ‘Here is so much money going into a public service. Does this public service return something to the community? Does it prove useful to the people in the community? and can you prove it?’”

5. The budget most likely to gain approval is a budget that is realistic. Nancy A. Van House, School of Information Management and Systems, University of California at Berkeley, told trustees attending a CALTAC Regional Workshop: “The problem is that the library can't be all things to all people; we don't have the money for that. ‘Meeting the information needs of the community’ is too vague a mission when we have to make choices and set priorities. It is the job of managers and policy

makers (including trustees) to choose what NOT to do, as well as what TO do.”

6. To protect against claims or actions instituted against a trustee, officer, employee or volunteer, “it should be considered mandatory that every library have an adequate level of insurance coverage,” stresses the American Library Trustee Association Board of Directors.
7. Involve the community as much as possible in the budget-making process. What the current funding level will make possible, and what it will not, needs to be reported to the people. Help them understand the library and library board efforts to include in the budget as many services as possible that they want and need. Get their ideas. Get their mobilized support. The people's awareness and involvement build effective library support.

### **Approaches to the Budget Process**

The completion of a proposed budget still leaves an important assignment for the library trustees, working in tandem with the library director. The trustees must be ready and willing to meet with city or county officials to support, clarify, or defend the proposed budget if need be. They must be armed with knowledge about the services the budget is designed to provide. They must be articulate and savvy in the ways the city hall or the county court house works (and who can be helpful allies). They must be determined, as community leaders, actively to seek support for what they know is important to the people in the community. They must coordinate closely with the library director. They must be prepared to mobilize other library supporters in the community. They know that the budget is the key to the library.

Many experienced library professionals insist that a budget presentation is a political negotiation with city or county officials for agreement on each precise service that is to be provided the community for the next year. It must be recognized that these elected officials, with responsibility for total city or county services, face many competing and persuasive appeals for the always-too-limited local funds.

Below are the areas the library board looks at as they review the budget summary sheets and other information:

- Have significant demographic changes occurred in the community that might impact library services?
- Has any library program had its budget reduced significantly and, if so, why?
- Are there areas of need that the staff has identified that the budget does not address?
- Overall, has the budget increased, remained the same, or decreased? (Reduced budgets can mean the loss of Public Library Fund allocations.)

### **A County Advisory Board Example**

A county library that is a special district first begins by estimating its revenue for the following fiscal year. The major source is the property tax. Although difficult, it is also necessary to estimate the amount of money which will be left over from the current fiscal year since these funds do not revert to the county's general fund but remain in the library fund available for the use of the library.

Library management then estimates the cost of maintaining the current level of services. If at all possible, it is best to have a reserve for emergencies. This is because as a special district, the county library cannot expect to be "rescued" by the general fund or by any other government agency. The library must have enough money to take care of any unforeseen emergency expenses.

The county librarian prepares a summary of the budget information and presents it to the library advisory board or commission for its review, questions, discussion, and recommendations to the Board of Supervisors. The commission's recommendations are forwarded to the Board of Supervisors by the chairperson or county librarian. The Board of Supervisors considers the library budget in the course of its regular budget hearings. In many cases where the library is a special district with its own defined revenue, the review is very minimal and the Board approves the budget as recommended by staff and the commission.

### **A City Advisory Board Example**

The following is an example of an Advisory Board participation in the budget planning process.

The city budgets on a two year cycle but each year the board of library trustees reviews the library's budget prior to its adoption by the city council. The library budget is divided into areas of library operations such as Cataloging and Processing, Adult Services, or Administration. Each program has a number of objectives that are accomplished by the completion of associated tasks. The budget is broken down to indicate the number of units of activity associated with each task, and the associated costs of completing these tasks.

After the budget has been distributed to the city council and to city departments, a budget workshop is presented, which is open to staff and the public in which the city manager reviews the critical factors that were considered as the budget was prepared. The library director, after attending the workshop, highlights the issues that are directly related to the library's current or future funding. The related budget and supporting information is put into a notebook for each board member.

At the next board meeting the director reviews the Budget Notebook information and answers questions for the board. In some cities, the role of the city council is to review the budget in terms of levels of services provided. It is the staff's responsibility to make sure the budget is adequate to provide that level of service. The role of the board is to focus particularly on the services offered by the library and make recommendations for changes to the council if they feel the planned services do not meet the community needs.

### **A County Administrative Board Example**

The following is an example of an Administrative Board's participation in the budget planning process. It comes from an administrative body, established under a Joint Powers Agreement between the county and nine individual cities, to operate the Library. It has full authority in all matters of personnel, policy, operation, and maintenance. Its annual budget, however, is subject to approval by the County Board of Supervisors. The steps in the budgeting process include:

- Attending a special budget workshop for the Commission in February to review the current year's revenue and expenditure summary and projections.

- Adopting, at this workshop, a set of budget assumptions for the next fiscal year, covering possible changes in facilities, services, and staffing levels. The Commission raises questions and makes suggestions to guide the library director in setting specific budget allocations.
- Reviewing the Library's Preliminary Budget at its regular April meeting, the Commission formally adopts it for the following fiscal year.
- Keeping informed, through the library director, of the ongoing review by the county administrator's staff and reports on any significant changes that arise in revenue and expenditure projections. Any technical adjustments to the Preliminary Budget must be approved by the Commission.
- Attending an August meeting of the County Board of Supervisors, when all budget requests are considered. The library director, Library Finance Officer, and members of the Commission are present to answer questions and support the Library's request, pending the board's formal adoption of the final budget.

### **A City Administrative Board Example**

According to the California State Education Code, General Law Cities have an Administrative Library Board. As such, they determine all policies including any policy pertaining to the budget. The city council appropriates city funds to run the library via a budget. The library board administers that budget. Usually, the library board delegates the administration of the budget to the city librarian. The library board does provide oversight and may approve all the bills. They can also set policy on such items as what size purchases need to come to the board and if transfers between line items have to come to the library board. The library board may determine, in advance of preparation of the budget for the next year, what are the priorities of the budget—for example, staffing, hours of opening, particular programs, particular roles, new services, and branches. Before the preparation of the budget for the next fiscal year, which usually happens somewhere between December and March, the library board needs to let staff know if they are willing to try to change the amount of funds the city may be willing to appropriate for the next fiscal year.

The city librarian and the library staff usually prepare the draft of the budget. The city librarian and the library staff use any direction from the library board, city council, and city manager in preparing the budget. The city will usually provide budget sheets which will tell the cost of particular staff as to salaries and benefits. The budget sheets may also give information on the cost of maintenance contracts and estimated costs of certain purchases—such as file cabinets and computers. Capital project and usually major maintenance projects (such as replacing a roof or redoing a parking lot) will usually have their own time lines and preparation guidelines. The draft of all parts of the budget needs to go to the library board for change or approval before it is sent on to the city.

The library board can approve, change, or send the budget back to staff for more work. The library board can direct the city librarian to increase the amount of the budget, but it will be up to the library board and the community to influence the city to appropriate more funds than planned. Once the library board approves the budget, it is sent to the city for approval. Usually this is via the city manager and/or the city's finance department.

If at any time city staff try to change the budget that is submitted, the change needs to go to the library board for approval. If the library board does not agree, they can file a variance and try to fight the change at the budget hearings.

The library board is to attend the city's budget hearings (most city's budget hearings are in June for a fiscal year starting July 1<sup>st</sup>). They are to be advocates for the library and for the community in terms of what is needed in the way of library service. They may need to speak to the council about various issues at the hearings or one-to-one before the hearings. They may need to work with the Friends of the Library to get people from the community out to the budget hearings to express their feelings about the need for library services or particular kinds of library services. Once the city council passes the budget, and if the situation warrants it, the library board should express appreciation to the city council for the budget.

## Chapter 7.

# Public and Community Relations

As with many topics, public relations is handled differently by different trustees and their boards. Some do very little; others may have a well developed program. It behooves each library board to evaluate what it does to promote the library and enhance public and community relations. As library advocates, trustees promote the library. This chapter discusses ways in which trustees can develop this component to greater advantage to the library.

Library trustees who view public relations lightly do their library a great disservice. It is true that a library cannot be made into what it is not by promotion or publicity alone. But it is equally true that sound public relations: 1) is more than promotion or publicity; 2) has a value to the library board and library, as well as to the people in the community; 3) and is essential to full community utilization and support for the library. Public relations is a vital element in successful library operational planning and procedure and is a primary responsibility of each library trustee and the library board as a whole.

### Definition of Public Relations

Public relations is the planning and management function of an organization that evaluates public attitudes; identifies the policies and procedures of the organization with that public attitude and interest; then executes a program of action to give the general public a better understanding of its policies and purposes to earn public acceptance and support.

Public relations is the essential communication of the trustees and library staff with the many different segments of the public that together make up the community. If well planned and executed, public relations actually is two-way communication that is valuable to all. It informs the people what role the library seeks to fulfill to enrich individual as well as

community life, any problems in doing so, plus all the services it currently provides them for their tax dollars. At the same time, a public relations program makes clear that the people's feedback is sought (both their perceptions of the library role and the individual needs each wants the library to fill) so their input can be incorporated into library planning. It is the people in the community who pay the bills and can affect public agencies through their tax power. Therefore, the very best public relations program starts with ensuring that the library responds to community needs with relevant services, then lets people know the services are there.

Public relations is communication with leverage. For example, if you send information to just one station for a Public Service Announcement (a free ad on the radio), 500 people might hear it. With a little practice, this might take you 15 minutes, start to finish. To personally tell each of 500 persons the same information would take a minimum of 500 minutes—over eight hours.

Public relations encompasses many types of communication, including, but not limited to:

1. Speeches, special presentations; both formal and informal meetings with community organizations, community leaders, and the general public; local TV, radio, and newspaper interviews.
2. Reports, public service announcements, and human interest stories in all the local media—newspapers, radio, and television; even trustee "Letters to the Editor" of each local newspaper.
3. Brochures, newsletters, flyers, slide presentations, bumper stickers.
4. Library-centered activities, such as programs, displays, exhibits, public tours of the library.
5. The general atmosphere created in the library itself—inviting, functional, accessible.



The library's formal "public relations program" touches all library users when they step inside the library door. For many, the library environment is the first and most important contact with the library's public relations program. Do you want community members who feel enveloped in a warm and friendly atmosphere that encourages personal enjoyment, exploration, and intellectual sociability, with an easily approachable staff? Or do you want them to feel ill-at-ease and somewhat lonely in an impersonal place with a puzzling user procedure, and a too busy staff?

### **The Why of a Public Relations Policy**

Virginia H. Mathews, a public relations expert and library consultant, has this explanation:

An ongoing comprehensive and high-level public relations and public information program is absolutely essential to any library which expects to maintain and increase its community support. In today's era of inflation and shrinking resources, there will be no unexamined acceptance by the public of any institution that does not grow in—and boldly show—the benefits it offers in relation to its costs...Involvement in the library public relations program is one of the trustee's most important responsibilities.

Public relations, rightly understood and administered, can become the means by which the community knows, appreciates, and uses the public library. Just as the cost of advertising can be justified in wider distribution and lower prices, so can the cost of a public relations program be justified in wider and better use of the library service.

An important goal for libraries to meet the needs of the public is to develop adequate and effective library and information services and then inform people about them. One of the objectives established to meet that goal is: Develop programs to make Californians aware of the types of information available to them and to assist them in collecting and using information in ways that are most valuable to them.

It is important to continue to view library use in new ways, keeping abreast of technology and community demographics, and to continually evaluate the library in terms of how it is meeting users' needs. The public relations value of sharing the everyday relevance of library services is one obvious benefit of alternative ways of looking at library use.

### **Benefits of a Public Relations Program**

The benefits of a library public relations program are many. Some of the major benefits are:

1. Keeps people informed about library services. Helps expand the library service outreach to maintain and increase library use by all in the community. Promotes a sense of community pride in the library. Helps attract and mobilize strong library advocates (a key factor in a building program or any major fund-raising vote or campaign).
2. Encourages feedback so people feel the library works to tailor its service to their needs; seeks their ideas.
3. Helps keep policy and funding officials at all levels of government reminded regularly of the library's vital and active role in the community, plus people's use and support of it.
4. Underscores the California legislature's declaration "that the public library is a supplement to the formal system of free public education, and a source of information and inspiration to persons of all ages, cultural backgrounds, and economic status, and a resource for continuing education and re-education beyond the years of formal education, and as such deserves adequate financial support from government at all levels."

### **Key Trustee Role in Public Relations**

There is a natural role and a major responsibility for the library trustee in public relations. Trustees serve as the public's representatives to provide library direction and guidance. The trustee needs to keep in close touch with the people, listening to their perceptions of the library, their still unmet information needs, and the role they want the library to fulfill. At the same time, the trustee needs

to serve as a spokesperson for the library to help people understand its role and any problems in fulfilling that role, as well as how to use all the library services.

As community leaders and citizens working on the library (or library system) board without pay in public service, library trustees are in a unique and key position to carry out this two-way communication. By virtue of their unpaid public service role, library trustees can speak out and respond to the public in ways that the library director and staff, in their public employee positions, cannot; or which if they did, might well be perceived differently by the public.

Some of the most effective public relations for the library is done by members of the library board who may not know that public relations is what they are doing when they talk to their friends about the library. Everything said about the library adds to the community awareness of an important service, and trustees need to take advantage of the many opportunities they have to boost the library.

A successful public relations program dovetailed with all other goals, objectives, and priorities can best be accomplished when the trustees and library director are working in close cooperation, with full understanding of the most effective role for each. Unless they work in tandem and write or speak publicly with one voice about the library, adverse public relations may result. Confusion and differences between their statements may hurt, rather than enhance, the library's image.

## **Fundamental Public Relations Guidelines**

It is impossible to present here a public relations program for every California library because of the diversity of California communities. A local public relations program that is successful needs to be fine-tuned to its own community characteristics and its own library situation. It should also be related to the statewide goals, objectives, and public relations programs that library leaders throughout the state have agreed are important for all California libraries. However, because all libraries have general public relations needs in common, some basic guidelines can be described.

### 1. Commitment to participate

Effective library public relations requires that everybody be committed to work at it—enthusiastically and regularly. It is not unnatural that some library trustees tend to shy away from involvement in what they see as “publicity seeking, promotion, or writing press releases.” Perhaps these activities do not come easily to them. Perhaps they feel public relations requires some formal training in journalism or public speaking.

Trustees have opportunities to do effective public relations through organizations to which they belong; through contacts they have or can easily make; and through communication skills they possess. Trustees likely are already doing much of what public relations entails—talking with pride and enthusiasm to friends and other community leaders about the library and its important role in the community. Some trustees may find it easier to involve themselves in public relations if they think of it more as “relations with the public.”

It is important to remember that each library trustee represents the library at all times, sometimes formally and sometimes informally. Varying backgrounds of board members lead to varying opinions. It may happen that each trustee will not always agree with board decisions, but in such an event the trustee should not act unilaterally. This is one of the important dictums for a board member, and it is a basic premise of continued service on the board. Trustees publicly speak for the board, publicly support board positions, and always remember that in addition to their voice, it is the united voice of the board that has the powerful impact. Different voices saying different things may result in adverse public relations.

### 2. Appoint a public relations committee

Establishment of a standing public relations committee concentrates effort and saves time for the total board. If the library board does not operate on the committee system, it can make regular provision on the agenda for the board as a whole to decide public relations needs and procedures in relationship with all other goals, objectives, and action programs. On



occasion, the board may make specific assignments for specific projects—always with a time schedule to clarify understanding and to keep the program moving forward.

A standing public relations committee may be responsible for:

- Working closely with the library director and designated staff to coordinate procedures.
- Analyzing public relations needs.
- Developing suggested public relations goals, objectives, action program options and priorities, then presenting recommendations to the full board for decisions.
- Initiating and carrying out the board's public relations action program.
- Evaluating the existing public relations program.

3. Include public relations in overall planning

Make the public relations program an integral part of the annual planning process, so that the goals as well as the priorities and action programs will mesh.

Public relations is a key ingredient in any building campaign or major fund-raising drive for any library purpose. This requires a specially planned public relations program that uses many types of communication, is intensive, well organized, spirited, and involves as many on the special campaign team as possible.

In any public relations program development, a comprehensive community assessment made for general library planning purposes is important. It identifies target audiences and provides important demographic information about them to help determine the most effective public relations approach. A community assessment identifies:

- Groups of individuals with similar needs, such as non-English speaking, handicapped, homebound, those needing large print books, and those who could benefit from the library's literacy campaign.
- Community organizations, such as civic, fraternal, senior citizen, service, recreational.

- Business, professional, and labor organizations, including major industries in the community.
- Education related institutions and organizations.

For public relations purposes, the organizations and institutions in the last three categories listed above should be further analyzed to determine: purpose and general role in the community; size of organization; the organization's past relationship with the library; its current leaders; which library trustees are members and/or might be in the best position to involve the group in the library's public relations program.

Setting some priorities is logical at this point. What is the priority message? To which target group or groups should attention be given first, second, and on down the priority scale?

Setting priorities can be difficult when there is much which needs doing. But it is important to tell one message at one time to a targeted audience.

The next big job is to develop a written action program, with timetables, and to develop the approach that most effectively will reach and motivate the targeted audience. This is when brainstorming can begin. Once the creative juices start flowing, the committee, or the board working as a whole, may find the hardest problem is selecting the best from the many (it is smart to keep the options not selected on file for possible future use.)

At this brainstorming time, library volunteers, Friends of the Library, Library Foundation members, and even some representatives of the target audience might be invited to sit in and contribute ideas, as well as act as a sounding board for proposed options. After all, who could better say how effective an action idea would be than some of the very people it is hoped the message will reach? And by involving them in this way the board is reaching out to communicate with the target groups.

One payoff for trustee membership in CALTAC and other library support organizations is that they provide idea exchange opportunities with trustees in other communities who can supply

“how-to” details for a list of tested ideas. However, because characteristics of communities differ, what works in one place may need to be given a different twist to work effectively in another.

4. Have a written policy statement

A written public relations policy will preclude misunderstandings and help prevent problems. Among points that should be clarified:

- Public relations responsibilities of the library director and the library trustees. This should describe how they will work together so the information they transmit to the public is consistent.
- Board approval procedure before any public relations committee action.
- Media contact procedures.
- Official spokesperson for the library board (generally the chairperson/president).
- Any clearance procedures necessary prior to member speeches or statements representing board position.
- Procedure for alerting the governing body of the jurisdiction about information to be made public by the board before publication, radio or TV airing, or announcement to any community groups. The media may well contact one or more members of the city council or board of supervisors for comments; therefore it is important that all are informed.

Trustees should have a copy of the public relations policy in their Trustee Manual. The library director should have a copy, the governing body should be informed of the policy, and a copy should be put on file available to the public.

5. Create a realistic public relations budget

Many productive public relations action programs can be accomplished with little or no cost. But even the minimal estimated costs of the annual action programs should be developed into a proposed public relations budget.

This formalizes the concept that public relations is an important means to keep the people informed about their tax-supported library and its potential for their benefit.

6. Evaluate the public relations program regularly

Evaluation at regular intervals will monitor progress, define problems, and show where adjustments need to be made to increase public relations success. A quick review of some frequent weaknesses in public relations programs may be helpful. Too often the planners do not:

- Really commit themselves to lay out and steadily pursue a public relations program.
- Clearly define for themselves the specific message they want to convey, or state it so it will be quickly understood.
- Define the target audience in order to utilize the best method of communication to reach that particular audience.
- Assign priorities to their messages. They may send numerous messages, and the receiving audience can become confused.

Some helpful steps in evaluation are the following reviews:

- Press and media coverage for the past year or more. What image of the library emerges? What aspects of the library story (such as children's programs, outreach programs, financial situation, goals and objectives) have been best told? What aspects least told? What could be tried to increase results? A survey of users and nonusers might provide useful ideas.
- Public relations program with organizations and community leaders. What types of information have they most often received about the library? What have they heard little about? What library image does it project? To what approach have they generally been most responsive? Least responsive? Perhaps a meeting or informal survey with some organizational leaders could help spotlight their reactions and produce ideas helpful both to their organizations and the library.
- Information distributed in the library and for library events, such as tours and special programs. What has been the response? What groups have responded most favorably? What groups have shown little, or even unfavorable response?

## Tips for Working with Local News Media

The local media (newspapers, TV, and radio) are a vital factor in all public relations efforts. In fact, the local media can be—and should be—one of the library's best friends. Therefore, the library board should be familiar with all media resources in the community. Not all media contact should be by mailed press release, report, or copies of the library board agenda.

Library trustees should make it a point to know personally the editors, publishers, TV and radio station managers, editorial writers, plus the staff personnel who are assigned “the library board beat.” As determined by library board planning, there should be regular “keeping in touch” efforts. Media contacts should be invited and encouraged to attend library board meetings and kept informed of meeting date schedules, agenda items, special meetings, and any other special events. Key media contacts should be on mailing lists for such items as reports and announcements. Library board members also should keep in mind the value of using the “Letters to the Editor” column. This is a means of directly reaching a large audience.

Generally, the library director and public relations staff member are the information source concerning library activities. The respective trustee and library director and staff roles with media contacts always should be clearly understood and observed.

Following are some tips for working with the media:

- Schedule visits to media representatives in the community. If the library has a public relations staff member, go together.
- Ask the media representative what they can use; in what form they wish to receive it; how often they can give coverage.
- Ask representatives for any ideas they have for giving publicity to the library. Let them think of

interviews, public service announcements, or even regular shows for local radio and TV stations.

- Compile a helpful information kit to give each media representative. For example: a summary of the library's goals, objectives, and priorities; current services; flyers or brochures; a listing of special upcoming events; and even a review or two of some new books that might be of personal interest.
- Absorb, but do not promise. Ideas, comments, or even complaints should be taken back to the board and the librarian for discussion as tools in planning future public relations programs.

## Key Public Relations Techniques for Writing and Speaking

Public relations professionals know that effectively written messages as well as speeches utilize certain key techniques. These include:

1. Get their ATTENTION
2. Hold their INTEREST
3. Create a DESIRE
4. Establish the CONVICTION (that the library alone can fill that desire)
5. Move them to ACTION

Be sure the action is easy to perform. If it's difficult and time consuming, most people will not do it. When creating PR materials, follow these guidelines:

- Be appropriately informal.
- Write the way you talk.
- Talk the way you do to a friend.
- Simplify. Only one idea per message.
- Be concrete, not abstract.
- Use short words, short sentences, and phrases.
- Use the active voice.
- Use pictures when you can.

## Chapter 8.

# Working Relationships

State laws as well as local laws and ordinances define the responsibilities of the library board. But those words alone do not make a successful library. People do—many others in addition to the library board. In actuality, it is these multiple, intangible working relationships that often make the difference between an actively supported and healthy library—or persistent problems, stalemates, and a limping library.

This chapter focuses on the importance of the library board's productive working relationships with the numerous individuals and groups with whom it needs to work on a continuing basis—as required by law, or by special commitment, or through library related interests. These include: the library director; city, county, or special school district governing body and their key administrative staff members; other official agencies; library staff; Friends of the Library; Library Foundations; library volunteers; any ad hoc library groups; local school officials; and the cooperative library system advisory board—especially the system advisory board (SAB) member (or members) representing the local community.

For SAB members, key individuals and groups include: the system administrative council; the system executive director and staff members; each system advisory board member's appointive city, county, or special school district governing body and their administrative staff members; plus the library board and library director in the community that SAB member represents.

These working relationships already exist. The only variables are whether they are productive or non-productive, close or distant, cooperative or uncooperative. The library board or the system advisory board determined to do its job well will make effective interaction a priority.

### Essentials for Productive Working Relationships

Library trustees should keep constantly in mind that, no matter how dedicated and capable they are, the board's first responsibility is to the general public and the public-supported library, an obligation that takes precedence over personalities, individual achievements, prejudice, partisanship, and politics. The essentials for productive working relationships include individual trustee and total board commitment, tact, understanding, flexibility, and astuteness in local government structure.

Effective two-way communication, which includes not only clearly stating a personal view but listening to others, is vital to productive working relationships.

### Working with The Library Director

Crucial to the success of the library is a productive and cooperative working relationship between the library trustees and the library director—all contributing their special expertise, exhibiting respect for the role of the others, and all committed to constructive interaction. Such an effective working relationship also is vital to the success of either the library board or the library director.

Their roles are different, but can complement each other if they are working together. Their relationship should never be adversarial, and will not be if all are concentrating their energies on the success of the library rather than on guardianship of their respective authority.

It does simplify and expedite mutually productive action if each has a clearly defined role that the other understands and acknowledges, without attempts to interfere. Should a substantive question arise, a written clarification for the record may be helpful, perhaps developed in consultation with the jurisdiction's legal counsel.

Traditionally, the library director is the library administrator. Traditionally, the library board exists to represent the people. The board is to see that the community is served with quality and community-relevant service, and to provide vital guidance to the local government and the library director in management, planning, and evaluation. Library board responsibility does not include the day-to-day management of the library. That is the responsibility of the library director and should not be assumed by the library board or individual trustee.

Some local government structures and administrative procedures make the working relationships more complex. City, county, and city-county libraries operate as departments of local government. One resulting example: The library director in a city library with an administrative library board works simultaneously with that board and a city administrator.

Because of the local library service pattern, trustees may find that their library director works simultaneously with as many as six or eight local library boards representing the regions served by the same library.

## **Working with Local Government Officials**

It is crucial for the library trustees to establish and maintain effective working relationships with the governing officials who make the ultimate budget and policy decisions in each local government jurisdiction—the mayor and city council members or the county board of supervisors. No library board can claim effective working relationships with these governing bodies unless all trustees are willing to (and do) regularly sit down and talk amicably (not antagonistically) about the library budget, programs, services, goals, building needs, or any related problems.

Not only do local governing officials hold the ultimate purse strings plus other “yes or no” powers over the library, but the politics of government on a day-to-day basis are subject to the pulling and tugging of a variety of local interests and institutions. Each library trustee has a responsibility to make certain that local governing officials put the library in its proper perspective, do not take it for granted or allow it to fall behind

community needs in the local government final decision-making.

It is important for trustees to make certain that the library is actively supported by the political power hierarchy as: 1) a unique community asset; 2) a major resource which meets articulated public needs for information as well as lifelong education, culture, and recreational pleasures; 3) an open, non-judgmental institution guaranteeing intellectual freedom for all people in the community, which local government must be prepared to protect against any and all censorship attempts.

## **Trustees’ Strong Working Relationship Position**

There are numerous reasons why library trustees are in an especially strong position to maintain such effective working relationships:

- Trustees enjoy an independence of approach because they serve without pay. As public officials, they can represent citizens to other public officials with freedom. Library directors lack this freedom of expression, as they may have a vested interest as an employee.
- Trustees are appointed or elected with a legal mandate to work in the interest of the library and the public it serves; therefore they can confer with the governing officials as part of the job they were selected to do.
- The impact of the board is felt because it represents the community and because it speaks with one voice.
- Trustees are voters in the local governmental jurisdiction.
- Trustees represent a broad base of people in the community.
- Trustees see the library from the users’ and the public’s point of view, yet they have a working knowledge of library operations, which provides a unique dual perspective.
- Trustees also have unstated political relationships with their local governing officials. These are a highly variable blend of local custom, interests, concerns, and personalities.

## **Methods For Working Relationships**

The methods by which an effective, interactive working relationship is established and maintained are varied. They include:



- Meetings of library board with entire governing body or with individual officials. (These may be formal or informal.)
- Communication with the letters and memos to and from governing body and library board requesting information, making proposals and recommendations, or providing information and reactions to proposals.
- Reports to and from the library board sent to and received from the governing body.
- Agendas and minutes of meetings.
- Announcements of upcoming library programs or special events.
- Verbal presentations or comments by a library board spokesperson at a regular governing body meeting. (Make it clear that you are speaking as a library board member. As a general rule, a library trustee speaks for the library board when appearing before local officials. Most trustees who wish to address their officials in a public, formal manner may do so simply by asking to be placed on the agenda at the officials' next meeting.)
- Personal, informal contact of library trustees with individual local officials.

### The “How” of Effective Communication

Often the difference between productive, unproductive, and even counterproductive working relationships rests squarely not on which communication method is used, but on how that communication is made.

Several basic guidelines from experienced library trustees:

1. Do not be hesitant, timid or even overawed in working with local governing officials, although always bear in mind that they merit respect for their authority and legal responsibilities. A key point to library trustees worth repeating: Trustees also are public officials appointed or elected to represent the best interests of the community in library services. Therefore, all local officials should welcome the opportunity to hear from, and to work with, trustees.
2. Express the same basic message. One message repeated makes impact!
3. Become acquainted with all officials and determine their philosophy about local government, including their voting history and positions regarding the library and library budget. This can help determine the most effective personal approach to gain their support.
4. Be familiar with local, state, and federal laws, as well as policies affecting the library. This includes an understanding of the local library's relationship to all departments of city or county government. Attend regular meetings of the governing body to observe.
5. Plan presentation strategy carefully before communicating about a specific issue. The time to make key points may be brief, and such an opportunity may not come again soon. Advance homework pays off.
6. Phrase all presentations around benefits to people in the elected official's district, or user needs, and community needs. (In other words, do not say: “The library needs. . .” Instead, say: “The people need. . .” Or “Your constituents need. . .” Or “The taxpayers will benefit . . .”)
7. Make important points as clearly but briefly as possible, mindful of the official's usually crowded schedule, or other items on the meeting agenda. Never be vague or speak in generalities.
8. Provide opportunity for questions. Be prepared for a pro and con discussion.
9. Be prepared to justify or to document with facts and figures the statements made in a presentation. Many times it is helpful to leave a brief fact or summary sheet with the officials for reference, study, or as a reminder.
10. Listen carefully for expressions of the official's viewpoint or points of concern, taking notes, if possible, to assist memory after the meeting. This may help develop answers that can later be provided to change the official's view; or indicate points which in compromise or consensus seeking could be of paramount importance.
11. Communicate regularly. Do not appear only at budget time.
12. Avoid belligerency, which is seldom, if ever, the road to success in government and politics. Professionalism, calmness, willingness to hear differing points of view, and consensus-building get more mileage—and a greater chance that



the door will be opened when the library trustee asks to come again. Should conflict arise, it is usually more effective to seek solution through consultation and amicable negotiations than through confrontation and litigation.

### **With Key Administrators and Other Local Officials**

Trustees who analyze the local governmental structure will recognize that there are certain administrative staff members and other officials in key positions of power whose cooperative support as library friends and allies can be helpful. They can provide information and advice to the library board, help expedite or arbitrate, and supportively present the library's case as they work with the governing officials and city or county operating departments.

Depending upon the structure and the size of the jurisdiction, these key position officials may include the city manager, county chief administrative officer, budget officer, planning department, purchasing officer, city or county clerk, or legal officer. They also may include officials and key staff members of other governmental agencies or intragovernmental bodies that have jurisdiction in matters pertaining to the library, especially a library with an expansion or building program in its future.

Obtaining the cooperation and support of various officials is more likely if they have had a cordial rapport with the library board on a regular basis. They need to be acquainted with the library's goals and needs. They should be informed about the library's unique position as a cultural and recreational center for people of all ages, and as a community asset that draws numbers of people into the downtown and/or to the shopping center where it is located.

### **With Library Staff**

Trustees individually, and the library board as a whole, have definite but officially circumspect working relationships with the library staff members. The trustees need to recognize and show their recognition that the library staff: 1) is the front-line image the public receives of the library; 2) has responsibility for helping implement the library goals, objectives, and plan of action, as well

as for equitable enforcement of policy; 3) has professional talent for and commitment to library service—and gives both to the library eight hours a day; 4) is part of the actual team (along with the library director and trustees) which must work together well in order to turn their mutually shared dream of a successful library into reality.

Conscientious trustees behave toward staff members as do directors of commercial boards with members of their firms. Their relations are open, cordial and friendly, appreciative and supportive, mindful of staff morale, businesslike without exception. Trustees do not intervene between staff and library director, directly criticize any staff member, or make comments concerning the library director or any other staff member. There is never any individual trustee request for, or expectation of, special privileges as an individual library user.

Effective trustees observe the library's management structure scrupulously, recognizing that all matters concerning management functions and day-to-day operation of the library are responsibilities of the library director and of the library supervisory staff.

Trustees also honor the channels of communication established within the library. While making it a point to visit the library periodically and regularly in order to serve on the library board most knowledgeably, the trustee also makes it a point to follow protocol of seeing library director first, and then visiting informally with staff. If a staff member approaches a trustee with an idea for improving service or with a complaint, the trustee listens in a friendly, noncommittal fashion, then encourages the staff member to present the idea via the library's accepted procedure. Effective trustees do not show favoritism among staff members.

At the same time, the wise library board will: 1) establish in cooperation with the library director written protocol on board and staff communications, including a policy that any staff work assignments in connection with the library board must be channeled through the library director; 2) reassess, when necessary, any committee or board assignments for staff in light of staff time schedules or deadlines, reordering

priorities or reassigning tasks; 3) put in writing any requests with which the library staff will be involved, being as specific as possible to assist the staff in providing the requested information in its most useful form for the purpose intended; 4) consider ways in which the library board alone or with other officials may publicly recognize staff, such as service-time recognition presentations or ceremonies, and honors recognition; 5) encourage staff training and professional advancement.

## **With Friends of the Library**

An especially significant relationship for library trustees is with the local Friends of the Library, a group of active volunteers who are independently organized to support, promote, improve, and expand the local library. Friends are among the most important citizen groups in the library. But their role and the library board's legal function are not one and the same, and cannot be treated as such by either the library trustees or the Friends.

The basic relationship between library trustees and Friends is mutually communicative, cooperative, and supportive—both groups are dedicated to promoting and improving library services.

However, this relationship between them, and the relationship of each to the library, is affected by the distinct differences in the role of each. Both groups, as well as the community, need to clearly recognize and understand the important differences. Working together and in cooperation with the library director, they can be strong driving forces to accomplish the library goals and priorities. Conversely, if they work uncooperatively or at cross-purposes, they may negatively affect the library's community image and its operation and services.

Trustees are a legally appointed or elected board, and are legally responsible for the results of their decisions and actions. They also are restricted to function within perimeters established by state or local law, ordinance, or policy.

Friends groups are separate, independent organizations with their own officers and organizational structure and are not responsible for the governance of the library, the administration of the library, or any library policy-setting functions.

Nor can they legally take on any of the functions assigned by law to the library board.

The local Friends provide many individual hours of volunteer library service, which may include raising funds for library service enrichments, sponsoring adult and children's cultural and educational programs, supporting library building or improvement projects, publishing news about the library, and encouraging library support by others. They speak effectively as library advocates to lawmakers at the local, state and national levels, and to other community organizations.

Most California public libraries, academic libraries, and some branch libraries are supported by local Friends of the Library groups. Library trustees can work with their local Friends organization to support the library by:

- Developing, in cooperation with the Friends and the library director, a policy to clarify the role of Friends in relationships to the library and the library board.
- Inviting and welcoming Friends to library board meetings, also encouraging at least one Friends member to serve as a regular liaison by attending all board meetings.
- Regularly providing Friends with information such as library board meeting minutes or agendas and reports.
- Considering Friends members for informal advisory or consultative committee membership, (especially all citizen input opportunities when library goals, objectives, and priorities are being planned annually to meet community wants and needs); in community and/or library-user surveys being developed and conducted.
- Attending Friends' special events (but always in compliance with the Ralph M. Brown Act).
- Recognizing Friends' contributions in such ways as letters to officials, certificates of appreciation, press releases, and in special programs honoring groups and individuals for support of the library.

## **With Library Foundations**

Equally important are effective library trustee working relationships with their local Library Foundation, if such an independent, public benefit corporation has been organized to solicit and

receive contributions to enrich services, facilities, and activities of the local library.

Their number is increasing throughout the state, and their contributions to the libraries they support are significant. These organizations generally undertake an active and ongoing program to solicit contributions of cash or property; memorial gifts to honor a friend or family member; bequest in a will or trust, or naming the Foundation as beneficiary of life insurance; or establishment of a special endowment.

The previously discussed methods for achieving effective working relationships between library trustees and a local Friends of the Library group also apply to maintaining productive working relationships between trustees and the local Library Foundation.

### **With Service-in-the-Library Volunteers**

Another significant, ongoing working relationship for library boards is with the many civic-minded individuals who recognize the benefits of a good library in their community and generously offer their personal time and talents for volunteer service in the library. Their tremendous importance to the public and the library merits recognition and gratitude from the library board, library director, and library staff, as well as from the community in general.

Library boards should remember that careful initial discussion and planning helps ensure that all working relations in the volunteer program begin—and remain—healthy and productive for the sake of the library's effective operation, its community image, and all supporters' involvement with the library. It is important to remember that even though volunteers perform many supplementary and important tasks for a library, they cannot supplant activities and functions of the specially trained professional staff.

In operating volunteer programs, trustees should provide a welcoming, cooperative and supportive working relationship with all volunteers. All library trustees need to recognize and respect: 1) the established and agreed upon structure of the volunteer program; 2) the role of the program

supervisor in the day-to-day coordination responsibility for the program; and 3) the established channels of communication. On every occasion trustees should show personal appreciation for volunteer assistance generously provided to the library and the community.

### **With Ad Hoc Library Advisory Groups**

From time to time libraries may be the fortunate recipients of a special project grant that mandates an advisory group to assist with community liaison and evaluation, such as an outreach community program funded by a Library Services and Technology Act grant.

It is the close and ongoing communication between trustees and this advisory group that will help ensure the benefits for which such advisory groups are designed. Communication, of course, does not just happen. It has to be planned for by the board and the library advisory committee. For example: Designated representatives of both library board and advisory board meet regularly for study and discussion, then report back to their respective boards. These representatives can help determine if the program is going along successfully.

### **With Local School Officials**

The need for the establishment and maintenance of productive working relationships between library trustees and local school board members and key administrators has long existed. But it is increasingly imperative when school budget reductions close a growing number of school libraries or reduce hours and staff, so that public libraries (always heavily used by students) then face greatly increased student use to fill the void.

### **Between Library Boards and System Advisory Boards**

System advisory boards for cooperative library systems were created to establish working relationships between: 1) the local library board and the system advisory board of the cooperative library system of which the local library is a member; 2) the local library board and the individual (or individuals) appointed to represent the local jurisdiction on the SAB.

Working relationships must be built on clear, mutual understanding by members of both boards as to the respective roles of each. New local library trustees should clarify the relationship between the SAB and the cooperative library system.

Both boards are committed to the library cause and to library services that meet the changing needs and wants of the public in the areas they serve. All include coordination with the library directors of the local library and the system administrative council.

Local library boards will find it helpful to: receive SAB agendas, minutes, and reports; attend, or send representative members to SAB meetings; perhaps invite the SAB chairperson to attend library board meetings; place the SAB on its mailing list.

Likewise, the library board may want to keep the local SAB member apprised of goals, objectives, and priorities; the current local library budget and still unmet needs; program activities; board concerns; community survey findings; reports; minutes and agendas.

## Chapter 9.

# Library Advocacy

No one is in a better position than the individual local trustee and library board to speak out freely as a strong advocate for the local library, the cooperative library system, and for libraries everywhere. Despite the professional knowledge, commitment, and dedication of the library director and staff, because they are library employees, they may be viewed as having a vested interest. However, trustees have a unique point of view because they are volunteers and community leaders who represent their fellow citizens. They see the library as a public service that will enhance their community and provide learning opportunities for this generation and for generations yet to come.

No individual and no group are in a better position than the trustee and the library board to motivate and mobilize other community leaders and leadership groups to join actively in library advocacy. Each library trustee has a responsibility to tell the library story to mayors and city council members, to county commissioners, to the governor and state legislators, and to the President and members of Congress. And no one is in a better position to do it!

### **Trustees' Strong Position For Advocacy**

Trustees are unpaid volunteers in public service. They can speak up as representatives of the public. By their willingness to serve, they demonstrate their strong belief in the value of a library as an institution dedicated to the pursuit of uncensored intellectual freedom; as a source of information and lifelong learning; and an asset which materially lifts their community from existence as a mere collection of houses and businesses to a community dedicated to the quality of life for all the people who live there. Their appointment by locally elected officials (or their election as trustees) is evidence that their abilities, plus their community leadership qualities and

dedication to community welfare, are recognized and respected by the people in the community. Their work as library board members gives them a professional and close working knowledge of the library. Their commitment to advocacy, plus their active advocacy role, shows their political acumen in government and in political realities. It shows their knowledge of how to make things happen.

The lines between advocacy, working relationship with local officials, and public and community relations often overlap. But determining the lines between is not as important as is doing them all and doing them well, no matter what they are called.

### **Why Library Advocacy By Trustees Is So Vital**

Why is library advocacy so vital in these times? A variety of reasons: 1) public libraries are an integral part of community life; 2) information and need for lifelong learning are increasingly important for each individual in the community; 3) libraries face costly technological changes to keep pace with such community needs; 4) the taxable wealth of each local jurisdiction varies at the same time that libraries face greater costs; 5) libraries' traditional tax funding bases are eroded; 6) libraries must be increasingly competitive with other departments of local government to meet increased community needs with shrinking and/or always limited funding; 7) without strong grassroots advocates to speak up, libraries can be lost in the shuffle of democracy's many voices, be taken for granted, and face tokenism.

### **Importance of Participation In Legislative Day in Sacramento**

In addition to regular contacts with elected state representatives, library trustees committed to carry out their uniquely important advocacy role can help libraries help people by participating in the annual



California Legislative Day—joining forces with hundreds of other library advocates throughout the state for a substantial show of library support in the legislative offices in Sacramento. This event is coordinated by the California Library Association and includes the California School Library Association. Library supporters focus on face to face discussions with lawmakers about how libraries can better serve the people.

Trustees can help make the day a success for libraries not only through their own participation, but by mobilizing members of the local Friends of the Library, library volunteers, and other community leaders to attend. The day permits visits to legislators' offices (and perhaps luncheon with them for informal and unhurried discussion); visits to the governor's office; sitting in on legislative committee hearings; and gathering key information from library legislation status reports by legislative leaders, the State Librarian, and California Library Association officers. The number of library advocates present, the meetings with legislators, and the media coverage of the day's events all serve to focus on the grassroots support libraries have, and what they mean to individuals and communities across the state.

## **Value of CLA Legislative Network in Advocacy**

To enhance their advocacy for California libraries (especially for state funding), trustees should seriously consider volunteering as a Contact Member of the California Library Association Legislative Network under the guidance of the CLA Legislative Committee. As CLA explains its Legislative Network:

Contacts provide legislators with timely information on general matters related to libraries, and in particular, to the needs of libraries ... Many Contacts also organize local 'grassroots' support groups to write letters, make telephone calls, and to lobby their neighbors and legislators to support legislation relating to libraries. The Contacts serve as conduits of information to the support groups, including the broadcasting of "Action Alert", which originates from the

CLA Legislative Committee and the Legislative Advocate.

## **Important Advocacy Techniques**

Being motivated to serve as a library advocate does not automatically mean doing the job effectively. Trustees must remember they are, in effect, matching wits with the political-arena pros, and are playing for high stakes. As players they need to know the rules of the game.

Some important "basics" suggested by trustees who have served effectively as library advocates:

1. Be prepared with facts, figures, and issues. Be clear about what you want to communicate.
2. Develop a professional mind set. Obtain copies of library related bills. Advocacy actually is an exhilarating intellectual challenge. Don't be timid or hesitant. Remember you are a voter speaking to your elected representative, not asking for something for yourself, but for all the people in your community and in the state. In truth, as a trustee you are a public official consulting with another public official—both accepting degrees of responsibility for public institutions and allocation of public funds.
3. Understand the basic political process—the way bills become laws, the layers of control involved in government at all levels—and learn the ways to affect government decision-making. It is important to recognize that city, county, state and federal laws and policies are not cast in stone. All can be modified to meet the changing needs and values of local citizens, local libraries and communities, county, regional, and state library systems.
4. Do not think you must go the library advocacy road alone. In reality, it is more effective if you enlist others. Your role can be effective as a catalyst. Mobilize community groups and community leaders, especially Friends of the Library, and encourage them to enlist others.

## **Ways to Communicate with Legislators**

The California Library Association suggests the following communications techniques:



### Personal Visits

Face to face discussion is the most effective use of communication and is essential to the establishment of a solid working relationship. A meeting is more easily arranged early in a session, before pressures build. All legislators have one or more district offices. Visits there will be more convenient for you than in Sacramento or Washington. California legislators are normally in their districts Friday-Sunday each week, during legislative recesses, and between sessions. Members of Congress return periodically (check with the district office), during Congressional recesses, and between sessions.

Constituents are always welcome in Sacramento or Washington. Be sure you have a firm appointment. Use the district office to make local or Capitol appointments. (Get to know district staffs: secretaries and administrative assistants. Close working relationships will benefit in many ways.) Take along others—library director, trustee, Friend, representative of a community organization, citizen activist. Keep the delegation small enough for an easy exchange of viewpoints with the legislator. Leave your card and any written information you may have prepared. Follow up with a letter of appreciation for the time provided for you to meet, and include any additional information suggested by the visit.

### Telephone Calls

Once you have made the acquaintance of your representative, telephone calls are appropriate and easy. Make them sparingly to the legislator, whose time is heavily occupied. (Regular contact with staff is more possible and desirable.) Telephone to ask support before a hearing or floor vote; to ask for help with legislative colleagues; and to convey urgent local concern. Judge how far to pursue by the reaction. Remember that it is more difficult for a legislator to temporize in a conversation than by letter.

### Letters, Letters, Letters

These are the chief fuel that powers any legislative vehicle. They are read. They elicit responses. They represent votes. (Each letter writer is deemed to represent several like-minded if less highly motivated constituents.) Letters may be formal or informal, typewritten or handwritten. They should

be composed by you, giving your reasons for your position (and giving the legislator reasons to support it). If you are asking support for a particular bill, cite the bill by number and author, and give the title or subject matter.

### Telegrams, Faxes, and E-Mail

These are fast, easy ways to communicate with legislators when the need for action is critical just prior to a committee or floor vote. For telegrams, use Western Union's statewide toll-free telephone number. Various low rates may be available.

### Five Basic Rules for Effective Communication

1. Be Brief. A legislator's time is limited. So, probably, is yours.
2. Be Appreciative. Acknowledge past support (and convey appreciation for current action).
3. Be Specific. Refer to local library and district needs.
4. Be Informative. Give reasons why a measure should be supported.
5. Be Courteous. Ask, do not demand or threaten. Be positive but polite.

## How to Write to Legislators and the Governor

- |  |   |
|--|---|
| <b>1. Address the letter and envelope as follows:</b>  | <b>Salutation/Closing:</b>  |
| The Honorable John/Jane Doe<br>United States Senate<br>U.S. Senate Office Building<br>Washington, DC 20510 | Dear Senator Doe:<br><br>Sincerely yours, (or) Very truly yours,          |
| The Honorable John/Jane Doe<br>House of Representatives<br>House Office Building<br>Washington, DC 20515   | Dear Mr. /Ms. Doe:<br><br>Very truly yours,                               |
| The Honorable John/Jane Doe<br>Governor of California<br>State Capitol<br>Sacramento, CA 95814             | Dear Governor Doe:<br><br>Respectfully yours, (or) Very truly yours,      |
| The Honorable John/Jane Doe<br>California State Assembly<br>State Capitol<br>Sacramento, CA 95814          | Dear Assemblyman/woman Doe<br><br>Sincerely yours, (or) Very truly yours, |
| The Honorable John/Jane Doe<br>California State Senate<br>State Capitol<br>Sacramento, CA 95814            | Dear Senator Doe:<br><br>Sincerely yours, (or) Very truly yours,          |

Letters may also be sent to a legislator's local or district office.

### 2. Cite bill by number and subject

I write in support of...  
Senate Bill 000 ...  
for public library funding.

I urge you to sign...  
Senator Doe's bill SB 000...  
for state aid for libraries.

### 3. Give personal or local interest:

Inability to obtain books, visit library, further studies, etc.  
Losses in local library services, hours, outlets, staff, etc.  
Reduction in local library budget or revenue; future prospects.  
Importance you attribute to library services.

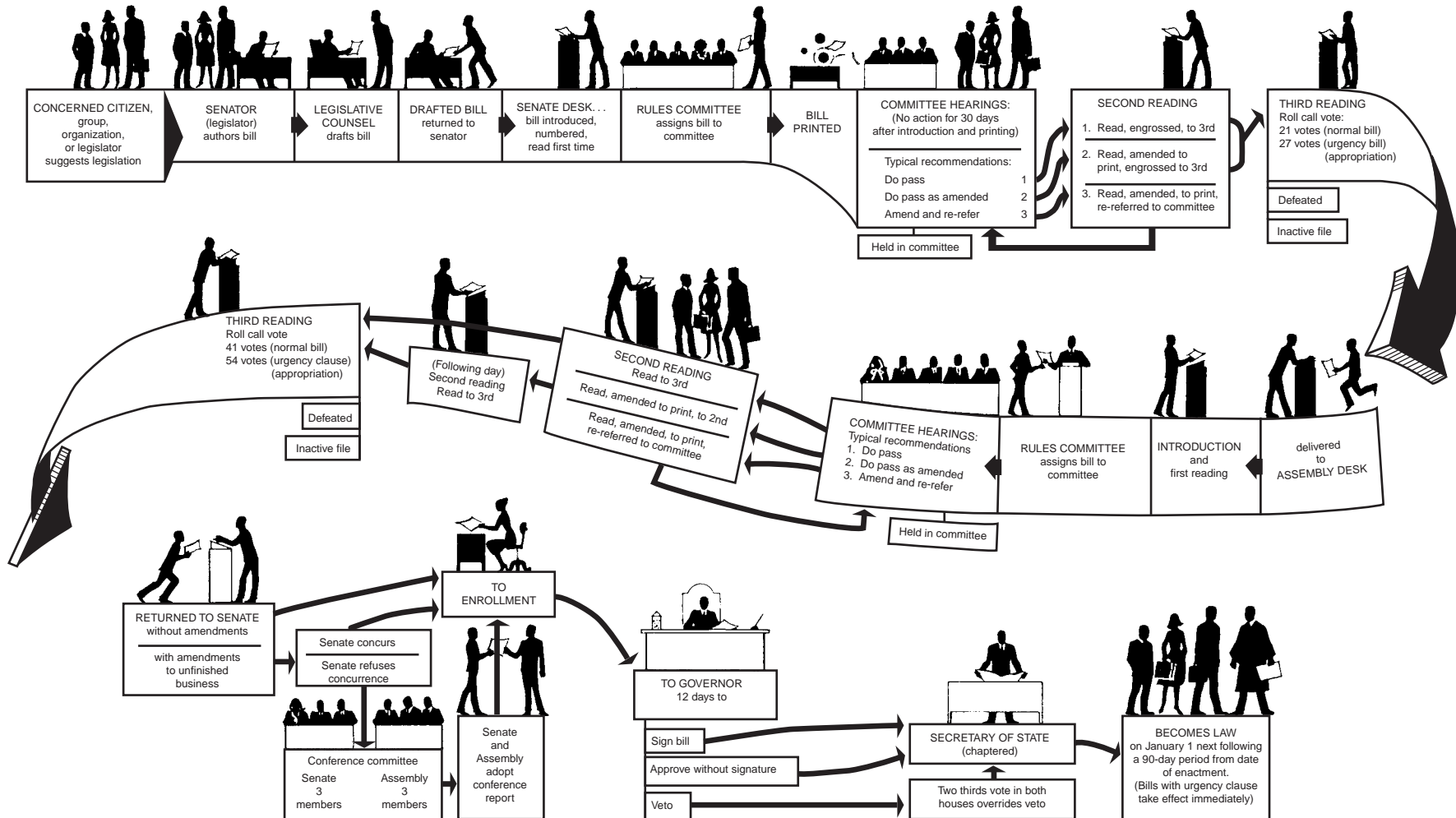
### 4. Explain one or more benefits of the bill:

Would restore lost revenues; prevent further reduction.  
Would restore reduced services (hours, branches, etc.); prevent further reductions.  
Would guarantee a basic level of library services to your community.  
Would result in state assuming its appropriate share of cost.  
Would prevent local city council or board of supervisors from (further) slighting the library.  
Would encourage (make possible for) local government to operate library adequately.  
Would utilize limited public funds for a high priority public service.

(Reprinted by the permission of the California Library Association)

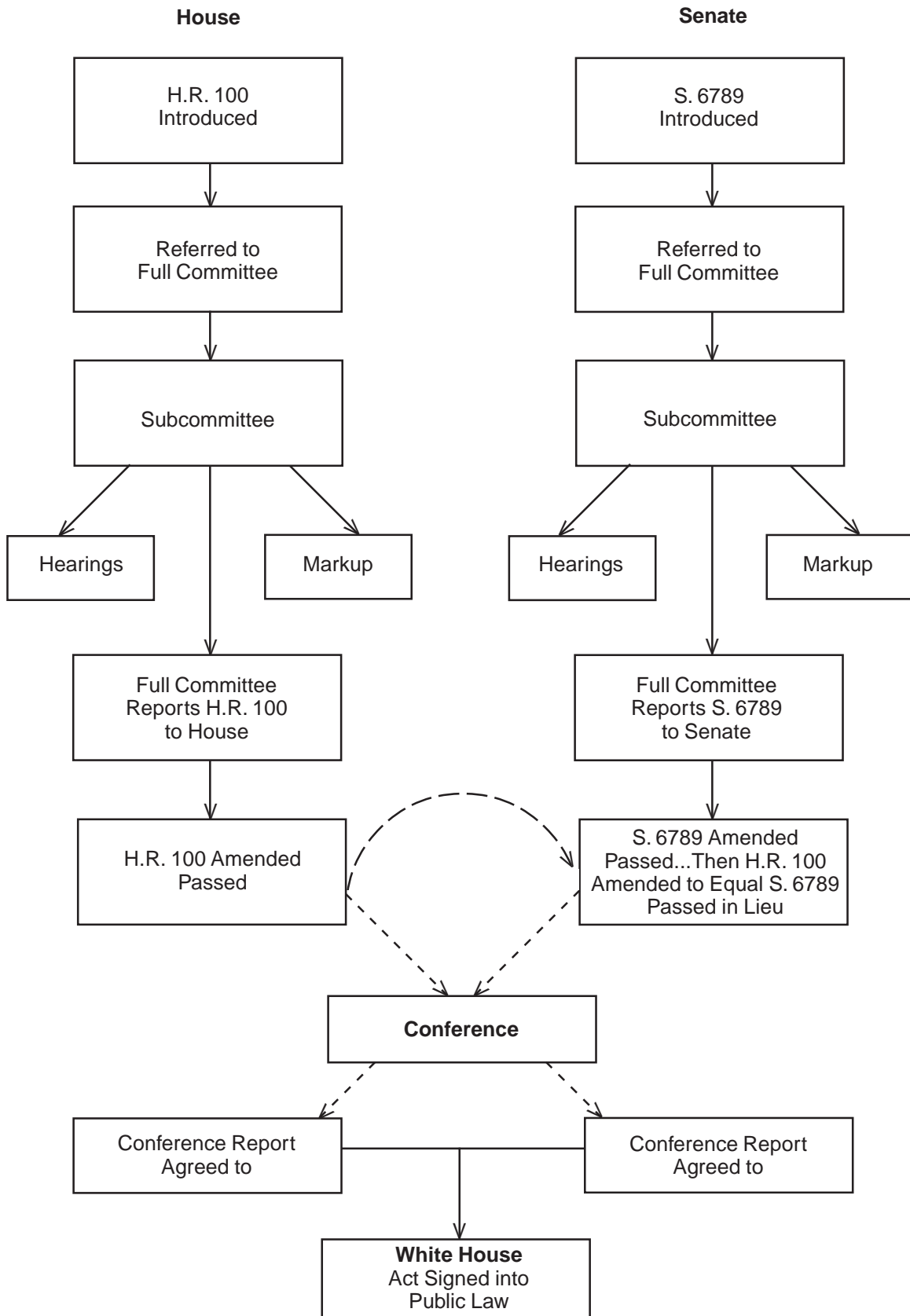
# How a Bill Becomes a Law

A Simplified chart showing the route a bill takes through the California Legislature



This chart depicts the flow of a bill originating in the Senate. Except for minor differences, the process is similar if originating in the Assembly.

## How a Bill in U.S. Congress Becomes Law



## Chapter 10.

# Special Challenges

Today's special challenges for library trustees will have immediate as well as future major impact on the local library, the community, and libraries throughout the state. They are numerous and not easily resolved. New challenges arise constantly. A special challenge for trustees and the library, such as a censorship attack, may come quite unexpectedly and require a relatively quick but professional and well-reasoned response.

### Trustee Techniques for Meeting Special Challenges

The problems that are special challenges for trustees are often new problems. Therefore, there may be no existing guidelines to follow for solutions. Some overall guidelines, however, may be gleaned from the past:

1. Study and become thoroughly familiar with all aspects of the nature of each challenge
2. Search out all resources and technical expertise, reliable advice, specific techniques, and perhaps financial resources
3. Use the systematic planning process and a professional approach
4. Develop a special public or community relations program to inform and to mobilize the support of the community
5. Pursue strong trustee advocacy efforts to inform and win support from local officials and, if needed, legislators at the state and national level
6. Remember that no community and no library functions in isolation. A trustee needs to be aware of challenges throughout the state and be prepared to help meet each.

### Selecting a Library Director

Selecting a library director is one of the most important duties and activities in which a public

library trustee participates. Procedures for selecting a library director vary. But the involvement of trustees always is important because they are uniquely acquainted with the library and its operations. They know its needs. Special library district administrative boards have the power to act unilaterally, and they select the library director. Administrative boards in many charter cities have authority to appoint the library director. In most of the smaller city libraries, which are operated under the general law, the library director serves at the pleasure of the city council or city manager. County librarians are appointed by the county administrator or board of supervisors. Advisory library boards may make recommendations, which because of their expertise and experience should be considered especially helpful.

For both administrative and advisory library boards, a change in top library management offers an opportunity to consider basic questions about the library and perhaps re-define its operation. For example: What is and what should be the role of the library in the community? Has the community changed and has the library reflected these changes? What type of library director will help achieve these goals? These questions should be answered in writing after discussions among trustees, interested elected officials and their staff, and even community representatives. Findings may show that a change of direction is desirable.

Trustees usually prepare, or collaborate with the jurisdiction's personnel department in preparing a job description for a library director, or revising one already on file with the personnel department. This job description will reflect the answer to "What type of library director is needed?" by containing a description of the job itself and listing of the minimum requirements and qualifications desired. The job description is often also the basis for the preparation of the official "Job Opening

Announcement” usually prepared by the city or county personnel director or administrator.

How widely and intensively to recruit for a library director is a decision that trustees will make, recommend, or influence (depending on whether they are administrative or advisory boards), after deciding on the desired direction of their library and, thus, on the type of individual who is needed.

One of the most desirable methods of final selection is for a formal board composed of librarians from other areas, and lay persons (including a trustee representative) to do the final interviewing and make strong recommendations to appointing officials. Criteria to be considered in the selection of the library director may be divided into at least three categories: personal characteristics, experience (including business administration), and education. These categories can be grouped into an informal checklist.

Trustees who have been involved with the selection process advise that it is important to remember that the new library director is the one who will run the library for many years—not the trustee. The director needs that combination of confidence, friendliness, self-discipline, leadership ability, and vision that will make the library the best possible.

## **Building a New Library, Remodeling or Enlarging**

Sooner or later, many trustees face the necessity for additional library space. Or they face a run-down, antiquated structure not adequate in many ways. Reasons for building vary. Lack of space, community growth or other community changes, outdated structures, or condemnations are the most frequent reasons. A decision to build usually lags behind the need.

Of all trustee duties, those involving building of any kind require: intense deliberations; complex and extended procedure in securing funds and follow-through of financial management; extensive planning and checking on a multitude of vital details. Any building project, from deliberations to dedication, requires close and cooperative working relationships with the library director, local jurisdiction governing body, and other local officials and agencies. It requires expert consultants—

legal, planning, financial, architectural, and construction.

It is important to be sure that at every step the public is consulted, kept informed, and remains supportive through a public or community relations program. To these ends, be sure to publicize the need for a new or expanded library; the decision to study the situation; the results of the study; and especially the recommendations. Not only is a sizable amount of public money being spent, but an institution is being created whose value and service for all people is projected far into the future.

### **Planning the New Structure**

Once there is agreement on the necessity for a new building, remodeling, or enlargement, sound planning becomes the key. Development of a written building program is a primary necessity. This statement should discuss in some detail what the new facility must provide, such as the space required for collections, computer equipment, seating, office facilities, and meeting rooms, and access facilities for handicapped users. The building program will serve as the basis for architectural plans and for the determination of the funds that must be raised.

Consultation with the State Library and with trustees and librarians who have recently been through the process will provide insight into what is successful, what options are available for consideration, and which will be most effective for your library.

### **Other Key Trustee Responsibilities**

Trustee responsibilities in the construction and furnishing phases realistically pass to contractors and a library building consultant. But the library board always must be in touch with the building project coordinator and be available for consultation and advice. Even the final phases of the project will involve a multitude of decisions and details, plus final inspection to assure that the work meets plans and specifications.

Library services may be expanded through a project remodeling and/or enlarging the existing library structure. The reasons for such a decision range from earmarked gifts or endowments, historical preservation and sentimental considerations, to the absolute necessity of having to use what is already in place.



Remodeling is usually more expensive than new construction and requires particularly careful planning and expert professional advice. Library services are usually disrupted during such a project, which means that the public has to be informed well in advance of any change and be reassured constantly.

## Intellectual Freedom

The library trustees have no greater responsibility in fulfilling their public trust, and have no higher contribution to make to the principles of freedom of speech and freedom of thought for every individual, than to preserve these rights in the local library they serve. The principles of intellectual freedom are contained in the First Amendment of the U.S. Constitution, which affirms all citizens' right to their own beliefs and expressions. Freedom of speech and freedom of the press are inseparably tied to freedom of access to an uncensored spectrum of ideas and information.

A major test of each trustee's commitment is to support these freedoms staunchly and stoically in the face of attack, perhaps well-organized group pressure, publicity, and local community furor. An even greater test may come if the trustee is called upon to defend these freedoms when the books and materials involved are not in accord with the trustee's personal beliefs.

Attempts to have specified books or other materials removed from the library shelves, and/or restrictions placed on materials selected by the library are an always-present specter. The Internet has created a new information platform for public access and for challenges. To be ready to meet these challenges, the trustees and library director, working closely together, need to have carefully developed policies in place, plus a "freedom to read" public information program in operation. If attacks come, they need to be well prepared to enforce the policies and to resolve the complaint amicably if possible, but to meet it with a calm and sustained plan of action that, in the end, will prevent censorship success.

Warnings cannot be made too strongly against complacency and against an "It hasn't ... It won't ... It can't happen here" attitude just because no serious censorship attacks have been waged on

the local library. The facts are clear. It can happen! It does happen! It is difficult to develop sound policies while under fire. What is needed at that point is quick, capable, unified leadership by library board, library director, and the governing body, along with understanding and support of the media and the community.

The library board and library director together must: 1) maintain a well-defined materials selection policy plus a materials selection complaint handling policy, both of which are sound, fair, easily understood, and well publicized; 2) make certain the fully developed procedures are clearly understood and will be implemented as planned by all involved, including the library staff; 3) keep the local governing body, as well as the local news media, closely attuned to any actions that are taken and the underlying basic principles involved; 4) keep local community leaders and organizations informed as well; and with any serious threat, solicit their strong and publicized support; 5) know where to turn for additional information and support; 6) quickly utilize all forces to assist if a serious censorship problem arises.

The sources of information and support include the California State Library, the active Intellectual Freedom Committee of the California Library Association (call the headquarters office of the California Library Association), and the American Library Association Office of Intellectual Freedom.

## Special Fund Raising

Library uses of special funding are varied. These funds provide materials and equipment that the library otherwise could not purchase from its budget. They support special projects. They facilitate promotional, educational, and cultural activities. They even make possible building, remodeling, or enlarging the library structure.

The sources of non-government funding for libraries are varied. They include: Friends of the Library, local library foundations; legacies; endowments; memorials and gifts; corporate, educational, and private foundation grants and/or support; as well as civic organization, service club, and individual gifts and support of various types. The fund raising methods are varied as well, ranging even to library "Gift Catalogs" circulated to

possible contributors to show materials and equipment on the library's "wish list" and cost of each.

Tapping sources of library funding beyond the revenue provided by government sources is not always easy for library trustees. It requires specialized knowledge and organization to be effective. There is considerable professionally directed competition for much of the potential funding.

There are frequent training workshops on writing grant applications available to trustees, both locally and regionally in California. They are provided by private, governmental, or state organizations. Contact your library director for more information on such workshops.

## **The Library of California**

For twenty years, Californians have explored the concept of multitype library networking through demonstration projects, studies, task forces, and grants. The early pilot projects proved that all California libraries could, and would, share resources that would be valuable to people. But early planning efforts to achieve multitype library networking on an ongoing basis proved that it would be a monumental challenge to create a program that could address the priorities and respect the differences among California libraries.

The knowledge and the statewide momentum exist right now for multitype library networking (resource sharing across all types of libraries including private and business libraries) for the benefit of every Californian. This is a big step beyond the present resource sharing which exists primarily between public libraries through the existing cooperative library systems of the state.

A consensus-based planning process begun in 1989, which ultimately involved thousands of California librarians and library supporters over a seven-year period, finally succeeded in defining the multitype library network plan to the general satisfaction of the library community. Led by the 125-person California Library Networking Task Force, the plan is now known as "The Library of California." It would give people access to billions of dollars worth of library and information resources by:

- Linking the 8,000 libraries of California electronically
- Supporting the access to information and collections for each Californian, from all California libraries (college, corporate, hospital, institutional, law, public, research, school, special, and university)
- Expanding the statewide resource pool in response to California's needs and priorities

Library trustees are encouraged to secure additional information concerning the Library of California and the status of implementation efforts from the California Library Association and the State Library.

The network plan will link all 8,000 libraries statewide for resource-sharing purposes: "one library...8,000 doors." That is not to say it will be easy. However, it is to say that the concept merits every library trustee's full consideration and involvement now and in the future.

## **Technological Advances Changing Libraries**

No era has posed a greater challenge to trustees in guiding a library's direction than does this present era of new technological developments. To move with a speed even relatively close to the speed of the communications revolution now underway, the library faces: 1) decision-making about complex and expensive equipment; 2) keeping local officials informed about the potentials for expanded community services which the technological innovations offer and apprised of justifiable cost/benefit ratios; 3) educating both the users and nonusers about the new library services.

Library trustees need to be in the forefront, helping shape the change, bringing it about, letting the budget-makers and the community know what a complete information center the library is, and how deserving it is of their strong support.

## **Eliminating Barriers Between People and Library Services**

Although strides have been made by libraries across the state to eliminate physical barriers for people with disabilities who need and wish to use libraries, too many of these physical, language,

cultural and other barriers still exist. They pose a special challenge for library trustees. Many are still not familiar with Title 24, Sec 504 and the Americans with Disabilities Act (Federal law requiring access to public buildings).

Passage of the Americans with Disabilities Act of 1990 underscores the necessity of removing those barriers. Title II of the Act requires nondiscrimination in state and local government services (including library services) and employment. No qualified individual with a disability shall, on the basis of the disability, be excluded from participation in or be denied the benefits of the services, programs, or activities of a public entity, or be subjected to discrimination by any public entity. The public entity can avoid compliance only if it will result in documented "undue hardship." All new library facilities that began construction on or after January 25, 1992 must be accessible. Newly remodeled buildings or parts of buildings shall be made accessible to the "maximum" extent feasible. But whether or not the building per se is accessible, the service or program when viewed in its entirety, must be readily accessible to individuals with disabilities.

Californians include non-English-speaking people hungry to use the library to become familiar with the English language and with the culture of their adopted country—yet also hungry, as is natural, to read in their native language and to keep their children from losing complete touch with the culture of their ancestors.

Californians include people who are functionally illiterate and school drop-outs struggling to break the bonds of reading limitations. Then there are the senior citizens who are often too proud and too hesitant to ask for help. Some do not have a disability, but nevertheless have problems of limited vision, hearing, mobility, and perhaps even limitations of formal education and knowledge of how to use a library. Many people with disabilities do not attempt to use the library because previous experiences have caused them to turn away. There are those who would use the library but physically cannot get there—those who are homebound or are institutionalized.

Some sense of the challenge to serve these special users adequately may be ascertained by

nothing more than a simple walk through the library as though wearing someone else's shoes, in order to evaluate how signs, interior arrangement, and building design help or hinder users. To give examples: What may seem a logically laid out library for an able-bodied person may present almost insurmountable barriers for a library user in a wheelchair, a person using a walker, or one who is unsteady with a cane. The top rows of self-service stacks may be higher than someone in a wheelchair can reach, with aisles between the stacks too narrow for operating a wheelchair. Or with two hands required for the walker or one hand required for a cane, how can the books be carried to the check-out desk?

### **Involving Local Libraries in California Literacy Programs**

Although reduction of illiteracy is closely related to the removal of barriers for using local library services, it merits focus in this chapter because of: 1) the scope of the problems; 2) its pervasive impact on individuals and their communities; 3) the special challenge to set prisoners of illiteracy free through a concerted California Literacy Campaign and the Families for Literacy Program that have been taken up by California libraries, under the leadership of the State Library.

The special challenge for local library trustees is to: 1) evaluate the problem in their own locale and, in cooperation with the library director, determine specific ways the trustees and the library can take a community leadership role as part of the California Literacy Campaign; 2) stress the value of a literacy program in their community to mobilize support, with special attention to the role of local government, schools, non-library agencies, organizations, and individuals as volunteers; 3) keep themselves and their community informed about the California Alliance for Literacy; 4) keep their state legislators informed as to how the state funding for the literacy program is serving their local community.

### **Additional Special Challenges**

It would be impossible in this chapter to identify all special challenges or techniques for coping with each because of their number and changing

nature. But a review listing of some additional challenges to foster thinking would include: getting the state legislature to view library support as a state priority (for example, several components in the California Library Services Act never have been funded); securing strong Presidential and Congressional support for the federal Library Services and Technology Act; the growing

privatization of government information; the seemingly anti-intellectual movements which are on the increase; the closure of many school libraries with a resultant heavier demand on public libraries; the increase in unattended children and youth in libraries; and coping with problem patrons (such as, disruptive, homeless, angry, emotionally disturbed) while protecting all user rights.

## Chapter 11.

# Helpful Organizations

This chapter lists and briefly describes some of the state and national organizations that can provide additional information and support for trustees and commissioners. Note that many of these organizations and resources are available using the Internet. Some of these web site locations are included in this chapter. If you need additional information regarding web sites or the Internet, contact your library director or reference desk.

Library trustees interested in doing an effective job will recognize the value of constantly widening their working knowledge of regional, state, and national library organizations, plus the support resources these organizations provide. Local libraries are impacted by numerous forces outside their local jurisdiction, and these state and national organizations can help keep such forces in sharper focus. Membership in these organizations can also provide access to networks of knowledgeable and like-minded persons to make possible the sharing of problem solutions, innovative new ideas, and current resource information. They also can strengthen the library support that comes through unity of efforts. Trustees should make it a point to become familiar with organizations and resources that are available to them. Some of the resources include the following:

1. State and national organizations that are actively involved and working cooperatively in the interest of libraries and their constantly improved services for all the people.
2. Reports on trends and impact forces affecting libraries; current funding and grant sources, plus future library funding outlook; special surveys; consultative assistance; publications; conferences, seminars, workshops, and other educational opportunities.
3. Personal membership in library support organizations and specific trustee associations at both the state and national level.

There are groups designed especially for trustees within the major state and national library organizations that provide a structured framework for communication, interaction, and cooperative efforts. By participating, trustees are able to communicate with their counterparts from other areas, and become familiar with common problems and solutions, as well as benefit from the value of joint actions.

Trustees may be hesitant about memberships in professional groups because they may feel the leadership is composed primarily of librarians. However, one of the many attributes a trustee needs to cultivate is the conviction that trustees are professionals too! One of the values of membership in the professional associations is the interchange between librarians and trustees, with mutual respect engendered by the contributions and collaborative efforts of each.

### Organizations at the State Level

There are a number of library organizations within California that are of importance to trustees and libraries and which can be of significant assistance to both. To discuss all such organizations here in full detail would be almost a book in itself; hence, the following listing is limited to those with whom the library trustee will most generally work. It focuses on the activities of these organizations most related to local library trustee interests, of necessity omitting a full presentation of their other activities.

#### California State Library (CSL)

Established by the first California legislature in 1850, the California State Library is a resource for all California library trustees and libraries. The State Library takes a leadership role; is a clearing house for information, research, focal point for action; is a stimulator, coordinator, and expeditor of library activities throughout the state.



**Service Mission:** The State Library is California's public research library that helps a diverse people, their governments and their libraries meet their knowledge and information needs.

**Organization and Activities:** To fulfill this mission, the State Library employs the following strategies: provide quality information services; collect, preserve and promote the state's resources; redesign public library service; and ensure a productive work force. Under California law, the State Library generally is responsible for assisting all state and local library authorities to assume their full responsibility for serving their users.

Its programs include: administering state and federal financial aid programs to public libraries; providing consulting and interlibrary loan services to local libraries; administering the California Literacy Campaign; providing library services to the state legislature, state agencies, and the governor; offering special client services to disadvantaged and handicapped citizens, including books for the blind and physically handicapped; collecting and preserving library materials on California and the West. (Refer to the California Library Directory for a full report on activities, specific services, and collection locations, as well as staff personnel, office addresses, and phone numbers.)

**State Librarian of California:** The State Librarian, who is appointed by the Governor, administers the State Library; serves as Chief Executive of the California Library Services Board (created by the California Library Services Act), with responsibility for administering state CLSA funds for public library resource sharing; has responsibility for awarding federal Library Services and Technology Act funds for library services and resource sharing services in California; and administers the California Literacy Campaign.

The State Librarian of California serves as advisor and/or consultant for numerous statewide library related membership organizations. He or she is a frequent participant and speaker at conferences, workshops, and meetings throughout the state before library trustee groups, as well as groups representing a variety of concerns and types of library service.

California State Library  
PO Box 942837  
Sacramento, CA 94237-0001  
Web site: <http://www.library.ca.gov>

### **California Association of Library Trustees and Commissioners (CALTAC)**

The purposes of CALTAC are several:

- To promote interest in the development of effective library service.
- To provide library trustees and commissioners the opportunity of working together on concerns important to all libraries in California.
- To educate trustees and commissioners to better carry out their duties and responsibilities.
- To help unify library action in the state by cooperating with the programs of the California Library Association and the California State Library.

Membership is defined in the CALTAC bylaws as:

Voting membership in CALTAC is open to every one who is or has been a trustee, commissioner, or system advisory board member of any library system in California. Non-voting Associate memberships are available to librarians, Friends, and any interested person or institutions who wish to support CALTAC's purposes and receive publications.

Library board members should join the California Association of Library Trustees and Commissioners and be actively involved with their professional trustee organization for several reasons: to keep up-to-date and well informed on library matters of concern to them as trustees responsible for promoting good library service in their community; to add to their effectiveness during their term of office; to make possible, after their terms of office have ended, the sharing of their experience and their expertise as trustees, and their continuing participation in and support of library activities.

As the professional trustee association since 1986, CALTAC needs the active participation of all California public library and system advisory board members, both past and present, in order to: utilize their leadership abilities; learn from and share their



expertise with trustees and others actively supporting libraries; and to strengthen, through unity, the voice of library advocates.

CALTAC offers:

- Regional workshops for continuing trustee education.
- **Trustee Tool Kit For Library Leadership.**
- Awards program recognizing outstanding contributions by individuals and organizations to library support. The honors are announced at the CALTAC annual meeting awards luncheon program.
- Publication of a quarterly newsletter, *CALTACTICS*.
- Participation in CLA committees and annual conferences.
- Participation in CLA annual Legislative Day in Sacramento.
- Production and distribution of "Support Your Library" lapel buttons. These provide a visible symbol when groups of library supporters gather as library advocates.

For information, see the CALTAC listing in the California Library Directory.

### **California Library Association (CLA)**

The California Library Association actively works to develop, promote, and improve libraries and librarianship in California. CLA is an excellent networking organization, offering many ways to make new contacts and share information with other members. CLA has over 2,400 personal members associated with academic, public, government, medical, religious, and special libraries. Their members include librarians, library employees, library students, Friends, trustees, and citizens. CLA is also supported by business members who supply products and services to libraries. Institutional members comprise libraries whose makeup is as diverse as our personal membership.

Special interest groups in CLA are called sections and round tables. A section is a large, broad-based group made up of at least 150 CLA members. Sections are concerned with types of libraries or activities. Round tables are smaller than sections (at least 20 CLA members) and are organized around specific interests. The Trustees

and Commissioners Round Table enables commissioners and trustees of library boards to confer, plan, and discuss issues among themselves and to develop legislative strategies.

For CLA membership and information:

California Library Association  
717 K St., Suite 300  
Sacramento, CA 95814  
(916) 447-8394  
Web site: <http://www.cla-net.org>

### **Friends of California Libraries (FCL)**

The Friends of California Libraries is the state organization of local Friends of the Library groups. It works cooperatively with the State Library, CALTAC, CLA, and other state and national organizations interested in supporting libraries and library services. Any organized group of Friends of any California library whose members act as citizen-supporters of that library is eligible for FCL membership.

FCL Mission: To enhance library services by providing effective leadership through advocacy, education and the dissemination of information to encourage community support for California Libraries. Among its purposes are:

- To assist and aid those citizen-groups organized to cultivate citizen interest, support and understanding of library services and needs in California.
- To encourage the organizing of such groups and to recommend ways of correlating and developing their interest in libraries in California.
- To encourage the development of adequate library services to all citizens of California.
- To cooperate with educational, professional, and civic organizations to this end.

Contact Friends of the Library at:

FRIENDS of California Libraries  
1980 Washington Street, No. 107  
San Francisco, CA 94109-2930

### **Organizations at the National Level**

There are a number of national library related organizations that are of importance to trustees and libraries and which can be of significant

assistance. However, the following list is limited to those with whom the library trustee will most generally have contact and focuses on those activities most related to local library trustee interests.

### **American Library Association (ALA)**

The American Library Association (ALA) is the major national library association. Its members include libraries, librarians, library trustees, and other interested persons. The mission of the American Library Association is to provide leadership for the development, promotion, and improvement of library and information services, and the profession of librarianship in order to enhance learning and ensure access to information for all.

The American Library Association, founded in 1876, is the oldest and largest national library association in the world. Its concern spans all types of libraries: state, public, school, and academic libraries; special libraries serving persons in government, commerce and industry, the arts, the armed services, hospitals, prisons, and other institutions. With a membership of libraries, librarians, library trustees, and other interested persons from every state and many countries of the world, the association is the chief advocate for the people of the United States in their search for the highest quality of library and information services. The Association maintains a close working relationship with more than 70 other library associations in the United States, Canada, and other countries, and it works closely with many other organizations concerned with education, research, cultural development, recreation, and public service.

ALA committees vary from year to year and are appointed by the president. These committees are responsible for areas affecting all library and Association concerns. The division within ALA that focuses on the interests of trustees is the American Library Trustees Association. However, other ALA groups such as the Library Administration and Management Association (LAMA), the Public Library Association (PLA), and numerous others provide cooperative support.

For additional ALA information, contact:

ALA  
50 E. Huron Street  
Chicago, IL 60611-2795  
Web site: <http://www.ala.org>

### **American Library Trustee Association (ALTA)**

The American Library Trustee Association (ALTA) is the division within the American Library Association dedicated to the concerns of library trustees. It is the only national organization for library trustees. Membership is open to trustees from all types of libraries, librarians, libraries as institutions, and Friends of Libraries, but most of the members are public library trustees. The California Association of Library Trustees and Commissioners (CALTAC) maintains a membership liaison working relationship with ALTA, and CALTAC urges its members also to become members of ALTA.

The American Library Trustee Association is interested in the development of effective library service for all people in all types of communities and in all types of libraries. ALTA recognizes that responsibility for professional action in some fields has been assigned to other divisions of ALA; its specific responsibilities as a division, therefore, are:

1. A continuing and comprehensive educational program to enable library trustees to discharge their responsibilities in a manner best fitted to benefit the public and the libraries they represent.
2. Continuous study and review of the activities of library trustees.
3. Cooperation with other units within ALA concerning their activities relating to trustees.
4. Encouraging participation of trustees in other appropriate divisions of ALA.
5. Representation and interpretation of the activities of library trustees in contacts outside the library profession, particularly with national organizations and governmental agencies.
6. Promotion of strong state and regional trustee organizations.
7. Efforts to secure and support adequate library funding.

8. Promulgation and dissemination of recommended library policy.
9. Assuring equal access of information to all segments of the population.
10. Encouraging participation of trustees in trustee/library activities, at local, state, regional and national levels.

Organization and Activities: ALTA holds an annual membership meeting, operates through a board of directors, and has a number of specific subject committees including awards, education of trustees, intellectual freedom, legislation, and liaison with Leagues of Municipalities and Associations of Counties. (Refer to the current American Library Association Handbook for ALTA officers, committee members, and how to contact them.) ALTA's official publication is the *Trustee Voice* (four issues a year), which is free to members; not available by subscription. There are many materials to assist library trustees (write for Checklist of Materials).

For information, membership, and publications, contact:

American Library Trustee Association  
 American Library Association  
 50 East Huron Street  
 Chicago, IL 60611-2795  
 Phone: (312) 280-2161

### **White House Conference on Library and Information Services Taskforce (WHCLIST)**

The White House Conference on Library and Information Services Taskforce works with people and groups interested in promoting the goals of the 1979 and 1991 White House Conferences on Library and Information Services. An advocacy organization, its purpose is to serve as a voice and active advocate, helping patrons and libraries to accomplish their missions. It is an independent association formed by conference delegates following the White House Conference. WHCLIST has regional representatives across the country and issues the newsletter, *WHCLIST Reporter*.

This national grassroots organization is "dedicated to improving library and information services, including support for White House Conference resolutions, by educating and listening to the public about library issues, and by developing plans and enlisting support for future national library forums."

## *Appendix A*

# Library Bill of Rights

The American Library Association affirms that all libraries are forums for information and ideas, and that the following basic policies should guide their services.

1. Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library services. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.
2. Libraries should provide materials and information presenting all points of view on current and historic issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.
3. Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.
4. Libraries should cooperate with all persons and groups concerned with residing abridgment of free expression and free access to ideas.
5. A person's right to use a library should not be denied or abridged because of origin, age, background, or views.
6. Libraries that make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use.

Adopted June 18, 1948

Amended February 2, 1961; and January 23, 1980, reaffirmed January 23, 1996 by the ALA Council

There have been a series of interpretations of the Bill of Rights. These are listed below. For additional information use the Internet ALA web pages, consult your library director, or the CLA Intellectual Freedom Handbook.

- Access for Children and Young People to Videotapes and other Nonprint Formats. Adopted June 28, 1989, by the ALA Council; (the quotation from Free Access to Libraries for Minors was changed after Council adopted the July 3, 1991 revision of that Interpretation).
- Access to Electronic Information, Services, and Networks. Adopted by the ALA Council, January 24, 1996.
- Access to Library Resources and Services Regardless of Gender or Sexual Orientation. Adopted by the ALA Council, June 30, 1993.
- Challenged Materials. Adopted June 25, 1971; amended July 1, 1981; amended January 10, 1990, by the ALA Council.
- Diversity in Collection Development. Adopted July 14, 1982; amended January 10, 1990, by the ALA Council.
- Economic Barriers to Information Access. Adopted by the ALA Council, June 30, 1993.
- Evaluating Library Collections. Adopted February 2, 1973; amended July 1, 1981, by the ALA Council.
- Exhibit Spaces and Bulletin Boards. Adopted July 2, 1991, by the ALA Council.
- Expurgation of Library Materials. Adopted February 2, 1973; amended July 1, 1981; amended January 10, 1990, by the ALA Council.
- Free Access to Libraries for Minors. Adopted June 30, 1972; amended July 1, 1981; July 3, 1991, by the ALA Council.
- Library Initiated Programs as a Resource. Adopted January 27, 1982. Amended June 26, 1990, by the ALA Council.

- Meeting Rooms. Adopted July 2, 1991, by the ALA Council.
- Restricted Access to Library Materials. Adopted February 2, 1973; amended July 1, 1981; July 3, 1991, by the ALA Council.
- Statement on Labeling. Adopted July 13, 1951. Amended June 25, 1971; July 1, 1981; June 26, 1990, by the ALA Council.
- The Universal Right to Free Expression. Adopted by the ALA Council, January 16, 1991.

## *Appendix B*

# **ALA Resolution on Filtering**

### **Resolution On the Use of Filtering Software in Libraries**

WHEREAS, on June 26, 1997, the United States Supreme Court issued a sweeping re-affirmation of core First Amendment principles and held that communications over the Internet deserve the highest level of Constitutional protection; and

WHEREAS, The Court's most fundamental holding is that communications on the Internet deserve the same level of Constitutional protection as books, magazines, newspapers, and speakers on a street corner soapbox. The Court found that the Internet "constitutes a vast platform from which to address and hear from a world-wide audience of millions of readers, viewers, researchers, and buyers," and that "any person with a phone line can become a town crier with a voice that resonates farther than it could from any soapbox", and

WHEREAS, For libraries, the most critical holding of the Supreme Court is that libraries that make content available on the Internet can continue to do so with the same Constitutional protections that apply to the books on library shelves; and

WHEREAS, The Court's conclusion that "the vast democratic fora of the Internet" merit full constitutional protection will also serve to protect libraries that provide their patrons with access to the Internet; and

WHEREAS, The Court recognized the importance of enabling individuals to receive speech from the entire world and to speak to the entire world. Libraries provide those opportunities to many who would not otherwise have them; and

WHEREAS, The Supreme Court's decision will protect that access; and

WHEREAS, The use in libraries of software filters which block Constitutionally protected speech is inconsistent with the United States Constitution and federal law and may lead to legal exposure for the library and its governing authorities; now, therefore, be it

RESOLVED, That the American Library Association affirms that the use of filtering software by libraries to block access to constitutionally protected speech violates the Library Bill of Rights.

Adopted by the ALA Council, July 2 1997



## *Appendix C*

# Freedom to Read

The freedom to read is essential to our democracy. It is continuously under attack. Private groups and public authorities in various parts of the country are working to remove books from sale, to censor textbooks, to label “controversial” books, to distribute lists of “objectionable” books or authors, and to purge libraries. These actions apparently rise from a view that our national tradition of free expression is no longer valid; that censorship and suppression are needed to avoid the subversion of politics and the corruption of morals. We, as citizens devoted to the use of books and as librarians and publishers responsible for disseminating them, wish to assert the public interest in the preservation of the freedom to read.

We are deeply concerned about these attempts at suppression. Most such attempts rest on a denial of the fundamental premise of democracy: that the ordinary citizen, by exercising critical judgment, will accept the good and reject the bad. The censors, public and private, assume that they should determine what is good and what is bad for their fellow-citizens.

We trust Americans to recognize propaganda, and to reject it. We do not believe they need the help of censors to assist them in this task. We do not believe they are prepared to sacrifice their heritage of a free press in order to be “protected” against what others think may be bad for them. We believe they still favor free enterprise in ideas and expression.

We are aware, of course, that books are not alone in being subjected to efforts at suppression. We are aware that these efforts are related to a larger pattern of pressures being brought against education, the press, films, radio and television. The problem is not only one of actual censorship. The shadow of fear cast by these pressures leads, we suspect, to an even larger voluntary curtailment of expression by those who seek to avoid controversy.

Such pressure toward conformity is perhaps natural to a time of uneasy change and pervading fear. Especially when so many of our apprehensions are directed against an ideology, the expression of a dissident idea becomes a thing feared in itself, and we tend to move against it as against a hostile deed, with suppression.

And yet suppression is never more dangerous than in such a time of social tension. Freedom has given the United States the elasticity to endure strain. Freedom keeps open the path of novel and creative solutions, and enables change to come by choice. Every silencing of a heresy, every enforcement of an orthodoxy, diminishes the toughness and resilience of our society and leaves it the less able to deal with stress.

Now as always in our history, books are among our greatest instruments of freedom. They are almost the only means for making generally available ideas or manners of expression that can initially command only a small audience. They are the natural medium for the new idea and the untried voice from which come the original contributions to social growth. They are essential to the extended discussion which serious thought requires, and to the accumulation of knowledge and ideas into organized collections.

We believe that free communication is essential to the preservation of a free society and a creative culture. We believe that these pressures towards conformity present the danger of limiting the range and variety of inquiry and expression on which our democracy and our culture depend. We believe that every American community must jealously guard the freedom to publish and to circulate, in order to preserve its own freedom to read. We believe that publishers and librarians have a profound responsibility to give validity to that freedom to read by making it possible for the readers to choose freely from a variety of offerings.

The freedom to read is guaranteed by the Constitution. Those with faith in free people will stand firm on these constitutional guarantees of essential rights and will exercise the responsibilities that accompany these rights.

We therefore affirm these propositions:

1. It is in the public interest for publishers and librarians to make available the widest diversity of views and expressions, including those which are unorthodox or unpopular with the majority.

Creative thought is by definition new, and what is new is different. The bearer of every new thought is a rebel until that idea is refined and tested. Totalitarian systems attempt to maintain themselves in power by the ruthless suppression of any concept which challenges the established orthodoxy. The power of a democratic system to adapt to change is vastly strengthened by the freedom of its citizens to choose widely from among conflicting opinions offered freely to them. To stifle every nonconformist idea at birth would mark the end of the democratic process. Furthermore, only through the constant activity of weighing and selecting can the democratic mind attain the strength demanded by times like these. We need to know not only what we believe but why we believe it.

2. Publishers, librarians and booksellers do not need to endorse every idea or presentation contained in the books they make available. It would conflict with the public interest for them to establish their own political, moral or aesthetic views as a standard for determining what books should be published or circulated. Publishers and librarians serve the educational process by helping to make available knowledge and ideas required for the growth of the mind and the increase of learning. They do not foster education by imposing as mentors the patterns of their own thought. The people should have the freedom to read and consider a broader range of ideas than those that may be held by any single librarian or publisher or government or church. It is wrong that what one can read should be confined to what another thinks proper.

3. It is contrary to the public interest for publishers or librarians to determine the acceptability of a book on the basis of the personal history or political affiliations of the author.

A book should be judged as a book. No art or literature can flourish if it is to be measured by the political views or private lives of its creators. No society of free people can flourish which draws up lists of writers to whom it will not listen, whatever they may have to say.

4. There is no place in our society for efforts to coerce the taste of others, to confine adults to the reading matter deemed suitable for adolescents, or to inhibit the efforts of writers to achieve artistic expression.

To some, much of modern literature is shocking. But is not much of life itself shocking? We cut off literature at the source if we prevent writers from dealing with the stuff of life. Parents and teachers have a responsibility to prepare the young to meet the diversity of experiences in life to which they will be exposed, as they have a responsibility to help them learn to think critically for themselves. These are affirmative responsibilities, not to be discharged simply by preventing them from reading works for which they are not yet prepared. In these matters taste differs, and taste cannot be legislated; nor can machinery be devised which will suit the demands of one group without limiting the freedom of others.

5. It is not in the public interest to force a reader to accept with any book the prejudgment of a label characterizing the book or author as subversive or dangerous.

The ideal of labeling presupposes the existence of individuals or groups with wisdom to determine by authority what is good or bad for the citizen. It presupposes that individuals must be directed in making up their minds about the ideas they examine. But Americans do not need others to do their thinking for them.

6. It is the responsibility of publishers and librarians, as guardians of the people's freedom to read, to contest encroachments upon that freedom by individuals or groups seeking to impose their own standards or

tastes upon the community at large.

It is inevitable in the give and take of the democratic process that the political, the moral, or the aesthetic concepts of an individual or group will occasionally collide with those of another individual or group. In a free society individuals are free to determine for themselves what they wish to read, and each group is free to determine what it will recommend to its freely associated members. But no group has the right to take the law into its own hands, and to impose its own concept of politics or morality upon other members of a democratic society. Freedom is no freedom if it is accorded only to the accepted and the inoffensive.

7. It is the responsibility of publishers and librarians to give full meaning to the freedom to read by providing books that enrich the quality and diversity of thought and expression. By the exercise of this affirmative responsibility, they can demonstrate that the answer to a bad book is a good one, the answer to a bad idea is a good one.

The freedom to read is of little consequence when expended on the trivial; it is frustrated when the reader cannot obtain matter fit for that reader's purpose. What is needed is not only the absence of restraint, but the positive provision of opportunity for the people to read the best that has been thought and said.

Books are the major channel by which the intellectual inheritance is handed down, and the principal means of its testing and growth.

The defense of their freedom and integrity, and the enlargement of their service to society, requires of all publishers and librarians the utmost of their faculties, and deserves of all citizens the fullest of their support.

We state these propositions neither lightly nor as easy generalizations. We here stake out a lofty claim for the value of books. We do so because we believe that they are good, possessed of enormous variety and usefulness, worthy of cherishing and keeping free. We realize that the application of these propositions may mean the dissemination of ideas and manners of expression that are repugnant to many persons. We do not state these propositions in the comfortable belief that what people read is unimportant. We believe rather that what people read is deeply important; that ideas can be dangerous; but that the suppression of ideas is fatal to a democratic society. Freedom itself is a dangerous way of life, but it is ours.

This statement was originally issued in May of 1953 by the Westchester Conference of the American Library Association and the American Book Publishers Council, which in 1970 consolidated with the American Educational Publishers Institute to become the Association of American Publishers.

Adopted June 25, 1953; revised January 28, 1972, January 16, 1991, by the ALA Council and the AAP Freedom to Read Committee.

A Joint Statement by: American Library Association & Association of American Publishers

This appendix is an abbreviated history of California

## Appendix D

# History of Early California Libraries

public libraries, and includes the shaping of library board structure and responsibilities (excerpted from the **Tool Kit Orientation Guidelines, 1981** by M. Virginia Hughes).

### Municipal Libraries

In the middle of the excitement of the gold rush days, predecessors of the free public library were already operating in the new California towns and cities. Special collections of books held by institutions, science, art, and law were available. But more important for future library users were the “social libraries.” There were two kinds of social libraries: the “subscription library society,” where subscribers paid a fee; and the “reading room societies.” These libraries provided a spur to self-education, a community oasis, and a moral influence upon the community. Temperance societies, YMCAs, and Ladies Associations were their most frequent sponsors. These libraries rose and faded, and tried again to survive. They were always in need of financial support, as monies from private sources, special subscriptions, and fees were continually insufficient.

By the 1870s, cities in California were flourishing north and south. Railroad expansion, desert reclamation, and winter health resort advantages led to tremendous efforts to attract new settlers. Civic institutions, including libraries, were considered promotional attractions, particularly in the southern California triangle area of Santa Barbara, Redlands, and San Diego.

At this same time, a San Francisco gentleman, Andrew Hallidie, a self-made industrialist and inventor of the cable car, became convinced of the necessity for free public libraries. He launched a militant campaign for tax-supported local libraries. Permissive library establishment legislation was carried in the state legislature for him by Senator George H. Rogers. This legislation became law March 18, 1878, and was known as the Rogers

Act. In effect, it was two laws in one: a combination of general library legislation for all cities, and special legislation for the establishment of a San Francisco library and library board. (Both Andrew Hallidie and the Honorable George H. Rogers became trustees on that first San Francisco library board.) The law authorized any incorporated city or town to levy a tax, not exceeding one mil on the dollar, for the establishment of free public libraries and reading rooms. Succeeding legislation changed the tax levy amount, but there was finally a foundation structure for steady support of public libraries.

There was a brief transition period after the landmark Rogers Act, followed by a revised general library law in 1880, but the “great age of the city libraries” had begun. Two “pre-Rogers” city libraries were Marysville, which had led the way in 1858 by establishing a public library under the responsibility of the city council, and Los Angeles, which soon followed. From 1878 on, many California cities, including San Francisco, Oakland, Sacramento, San Jose, Stockton, Vallejo, Ventura, Alameda, Santa Cruz, Napa, Santa Rosa, Santa Barbara, Petaluma, Eureka, and San Diego, established California municipal libraries. These early libraries fulfilled the early definition of a public library as “an agency established by state law, supported by local taxation, managed as a public trust, and open to every citizen of the city or town that maintained it.” By 1917, there were 132 municipal libraries in California, giving testimony to organized community activity and the flourishing concept of a library as a community asset.

Under the Rogers Act, the authority of a city library board was extremely limited. Library personnel, salaries, and buildings were concerns of municipal authorities, rather than of library boards. Between 1878 and 1917, however, the powers of municipal library boards were made more liberal, with city councils’ control reserved for real estate and building expenditures. The revised general library

law of 1901 provided for election, rather than appointment, of trustees. At that time, charter city libraries were not affected if their stipulations were different. As charters have been revised through the years, California State Library records show that currently all city library boards are appointed by mayor, city council, or both.

## County Libraries

Following the local private library clubs, social libraries, and local reading rooms, the organized city libraries gave service to incorporated cities and towns; however, sparsely populated, isolated areas were still not served. In 1909, the California county library law was designed as a comprehensive plan of service for all state residents, rural as well as metropolitan. It centered on neighborhood stations, supported by a central county headquarters collection; and if a patron's request could not be supplied, the books could be requested from the State Library. Cities could benefit from these larger resources by joining or contracting for these additional library services.

Two years later, the revised county library law of 1911 answered a number of objections that emerged from the 1909 legislation. For example, cities were automatically exempted from a county library tax. Cities could join a county library system, but only if they requested to do so themselves. The county library would cover only that portion of the county not served by city libraries or special district libraries. A county library could be established by the county board of supervisors. Governance of the county library was vested in the entire board of supervisors. This pattern of county library service became a model for other states and even other countries. It was the handiwork of James L. Gillis, California State Librarian, whose dream it was that no one should be denied access to books, regardless of where they lived.

To learn more about the moving experiences of county library organization, plus the humorous, frustrating, and political adventures of the first California county library organizer, read **County Free Library Organizing in California, 1909-1918** by Harriet Eddy.

## Special District Libraries

District libraries came into being under the 1909 general library law that authorized unincorporated areas to establish public libraries by creating special library districts. Under the California Education Code (Secs. 19400-19532), a district "may include incorporated or unincorporated territory, or both, in any one or more counties, so long as the territory of the district consists of contiguous parcels and the territory of no city is divided." These same California laws also designated election of the special district library trustees to four year terms, and specified their administrative responsibilities and governing authority.

## Oldest Public Libraries in California

Several California libraries already have celebrated their first century of operation and service to their communities. This list of public libraries established before 1909 was reported in the first issue of **News Notes of California Libraries**, May 1906.

Marysville City Library	1858
Oakland Free Public Library	1868
Hollister Free Reading Room	1875
Alameda Free Public Library	1877
Eureka Free Public Library	1878
Los Angeles Free Public Library	1878
Petaluma Free Public Library	1878
Ventura Free Public Library	1878
Arcata Public Library	1879
Sacramento Free Public Library	1879
San Francisco Free Public Library	1879
San Jose Free Public Library	1880
Stockton Free Public Library	1880
Santa Cruz Free Public Library	1881
Pasadena Free Public Library	1882
San Diego Free Public Library	1882



**Trustee Tool Kit for Library Leadership**

Santa Barbara Free Public Library	1882	San Mateo Free Public Library	1895
Santa Rosa Free Public Library	1884	South Pasadena Free Public Library	1895
Vallejo Free Public Library	1884	Coronado Beach Library	1896
Martinez Free Reading Room and Library	1885	Healdsburg Free Public Library	1896
Goodman Free Public Library, Napa	1885	Kern City Free Library	1896
Pomona Free Public Library	1887	Livermore Free Public Library	1896
Sierra Madre Library Association Library	1887	National City Free Public Library	1896
Riverside Public Library	1888	Palo Alto Free Public Library	1896
Hanford Free Public Library	1890	San Juan Free Public Library	1896
Redondo Public Library	1890	Watsonville Free Public Library	1896
Santa Monica Free Public Library	1890	Covina Free Public Library	1897
Fresno Free Public Library	1891	San Luis Obispo Free Public Library	1897
Santa Ana Free Public Library	1891	Escondido Free Public Library	1898
Tulare Free Public Library	1891	Hayward Free Public Library	1898
St. Helena Free Public Library	1892	Highland Library Club, San Bernardino County	1898
Woodland Free Public Library	1892	Los Gatos Free Public Library	1898
Monrovia Free Public Library	1893	Beale Memorial Free Public Library, Bakersfield	1900
Campbell Free Library	1894	Corona Free Public Library	1900
Orange Free Public Library	1894	Dunsmuir Library	1900
Ramona Public Library, San Diego County	1894	Santa Fe Library, Needles	1900
A. K. Smiley Free Public Library, Redlands	1894	Upland Free Public Library	1900
Berkeley Free Public Library	1895	Whittier Free Public Library	1900
Long Beach Free Public Library	1895		



## *Appendix E*

# **Initials and Acronyms in Common Library Usage**

Numerous initials and acronyms are commonly used by library professionals and individuals active in the library world. The following list of those most often used in the California library community is provided for quick reference. Please note that because of changing technology, this list may not be current.

AALL	American Association of Law Libraries
AASL	American Association of School Librarians. A division of the American Library Association
ABA	American Booksellers Association
ACRL	Association of College and Research Libraries
ADA	Americans with Disabilities Act
AICCU	Association of Independent California Colleges and Universities
ALA	American Library Association
ALA OIF	American Library Association Office of Intellectual Freedom
ALAOIF	A listserv discussing all issues of intellectual freedom
ALAWON	American Library Association Washington Office Newsletter
ALTA	American Library Trustee Association, a division of the American Library Association
ASIS	American Society for Information Science, Washington, D.C.
ATSS	Automatic Telecommunications Switching System (California)
AV	Audio-visual, including non-book materials except microfilm and microfiche
AWLNET	Area Wide Library Network, associated with the San Joaquin Valley Library System
BALIN	Bay Area Library Information Network, affiliated with BALIS
BALIS	Bay Area Library and Information Service
BayNet	Bay Area Library and Information Network
BIA	Braille Institute of America, Southern California Regional Library
BIP	Books In Print
BLIC	Black Gold Information Center, Black Gold Cooperative Library System
BRS	Bibliographic Retrieval Service
BTBL	Braille and Talking Book Library, California State Library
CAL	Central Association of Libraries, a network associated with the 49-99 Cooperative Library System
CALINET	Network comprising UCLA, USC, CalTech

CALIX	California Library Association listserv. Focuses on issues of interest to library staff and supporters in California. Contact the California Library Association for information on how to join this free listserv.
CALLS	California Academic Libraries List of Serials
CAL-PALS	California Private Academic Libraries
CALTAC	California Association of Library Trustees and Commissioners
CALTACTICS	Quarterly newsletter published for members by California Association of Library Trustees and Commissioners
CARL	California Academic and Research Librarians Association (also CARL Corporation)
CCC	Copyright Clearance Center
CCCLC	California Community College Libraries Cooperative
CD-ROM	Compact Disc-Read Only Memory
CE	Continuing Education
CLA	California Library Association
CLSA	California Library Services Act, (SB 792) 1977
CLSB	California Library Services Board
CNI	Coalition for Networked Information
CONSER	Cooperative Conversion of Serials, an international bibliographic program
CSAC	County Supervisors Association of California
CSL	California State Library
CSLA	California School Library Association
C.S.U.	California State University
CUC	California Union Catalog, California State Library (1909-1979, microfiche)
CULP	California Union List of Periodicals
DPA	Department of Personnel Administration (State of California)
ED	U.S. Department of Education
EDD	Employment Development Department, (State of California)
EEOC	Equal Employment Opportunity Commission
E-mail	Electronic Mail
ERIC	Educational Resources Information Center
ESEA	Elementary and Secondary Education Act, a federal program
49-99	49-99 Cooperative Library System
FCL	Friends of California Libraries
FTE	Full Time Equivalent, a personnel measure
FTRF	Freedom to Read Foundation

FY	Fiscal Year
GBALC	Greater Bay Area Library Council
GPS	Government Publications Section, California State Library
HEA	Higher Education Act, a federal program
I & R	Information and Referral
IFC	Intellectual Freedom Committee, American Library Association
IFLA	International Federation of Library Associations and Institutions
ILL	Transaction in which library materials are loaned from one library to another library for use of a patron
ILR	Interlibrary reference
IMLS	Institute of Museum and Library Services, federal agency that oversees LSTA (Library Services and Technology Act)
InFoPeople	Internet For People. . .connecting through California libraries
INLAND	Inland Library System
INTERNET	A system that lets computers all over the world “talk” to each other
ISBN	International Standard Book Number, international copyright number used by the Library of Congress. For example: 0-394-54154-5—1st number is group identification (language); 2nd number—publisher; 3rd number—title; 4th number—check number
ISO	International Standards Organization
LAMA	Library Administration and Management Association, a division of American Library Association
LAN	Local Area Network
LC	Library of Congress, Washington, D.C.
LFF	Libraries For the Future
LITA	Library and Information Technology Association
L/MTA	Library/Media Technical Assistant
LSCA	Library Services and Construction Act, predecessor to LSTA
LSTA	Library Services and Technology Act, a federal program that distributes grants
LTA	Library Technical Assistant
LVA	Literacy Volunteers of America
MARC	Machine Readable Cataloging, Library of Congress
MCLS	Metropolitan Cooperative Library System
MELVYL	A statewide online union catalog maintained by U.C. libraries with titles from all nine campuses, served by a statewide packet-switched telecommunications network
M.L.S.	Master of Library Science
MOBAC	Monterey Bay Area Cooperative Library System

MSA	Metropolitan State Area
MVLS	Mountain Valley Library System
NBC	North Bay Cooperative Library System
NCLIS	National Commission on Libraries and Information Science, Washington, D.C.
NEH	National Endowment for the Humanities, a federal grant program
NISO	National Information Standards Organization
NLA	National Librarians Association
NLW	National Library Week
NOCALL	Northern California Association of Law Librarians
NORTH STATE	North State Cooperative Library System
NTIS	National Technical Information Service, U.S. Department of Commerce
OCLC	Online Cooperative Library Center, Inc., bibliographic utility based in Columbus, OH, formerly Ohio College Library Center
OPAC	Online Public Access Computer
ORBIT	Online Retrieval of Bibliographic Information: Time Shared
OSHA	Occupational Safety and Health Act, a federal program; (in California, CalOSHA)
PALS	Public Access to Library Services, a Napa library program
PLA	Public Library Association, a division of the American Library Association
PLAOC	Public Library Administrators of Orange County
PLEASC	Public Library Executives Association of Southern California
PLECC	Public Library Executives of Central California
PLF	Public Library Fund, a state support program for libraries
PLS	Peninsula Library System
PLSA	Public Library Services Act, State of California (superseded by CLSA)
PSRMLC	Pacific Southwest Regional Medical Library
PUBLIB	Public Libraries listserv
RASD	Reference and Adult Services Division
REFORMA	National Association of Spanish Speaking Librarians in the U. S
RFP	Request for Proposal
RIF	Reading Is Fundamental organization
RLG	Research Libraries Group
RLIN	Research Libraries Information Network
ROM	Read Only Memory
SAB	System Advisory Board for Cooperative Library System

SALO	Sacramento Area Library Organization
SAM	State Administrative Manual, (State of California)
SLS	Santiago Library System
SCALL	Southern California Association of Law Libraries
SERRA	Serra Cooperative Library System
SJVLS	San Joaquin Valley Library System
SLA	Special Libraries Association
SMSA	Standard Metropolitan Statistical Area, predecessor to MSA
SVLS	Silicon Valley Library System
SOUTHNET	A multi-type network of corporate, school, and academic libraries located primarily in Santa Clara County.
SOUTH STATE	South State Cooperative Library System
SPB	State Personnel Board
T-1	Leased line connection capable of carrying data. Fastest speed communications to connect networks to the Internet
TBR	Transaction-based reimbursement, (State of California CLSA programs)
TDD	Telecommunication Device for the Deaf
TELEX	Teleprinter exchange; automatic teletypewriter exchange service
TTY	Teletypewriter, telephone device to communicate with people who are hearing impaired
U.C.	University of California libraries
WAN	Wide Area Network
WATS	Wide Area Telecommunications System
WHCLIST	White House Conference On Libraries and Information Services Taskforce
WWW	World Wide Web, a part of the Internet in which information of any nature, without standardization or verification, may be presented.
YA	Young Adult

## *Appendix 7*

# Library Board Structure

### California General Law Cities with Library Boards—Administrative

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	Notes
Brawley Public	21,500	5	City Council	3 yrs	No limit on terms
Camarena Memorial Public Library	25,150	5	City Council	4 yrs	No limit on terms
Harrison Memorial (Carmel)	4,460	5	Mayor/Council	3 yrs	
Colton Public	44,650	5	Pres. of Board w/approval of City Council	3 yrs	No limit on terms
Corona Public	102,800	5			
Coronado Public	29,250	5	Mayor/Council	3 yrs	2 term limit w/some exceptions
El Centro Public	37,500	5	City Council	3 yrs	
Escondido Public	119,900	5	City Council	3 yrs	2 term limit
Fullerton Public	122,800	5	City Council	3 yrs	No limit on terms
Glendora Public	51,900	5	Mayor/Council	3 yrs	2 term limit
Hemet Public	52,315	5	City Council	3 yrs	No limit on terms
Imperial Public	7,178	5	City Council	3 yrs	No limit on terms
Lodi Public	54,800	5	City Council	3 yrs	No limit on terms
Lompoc Public	67,660	5	City Council	3 yrs	
Los Gatos	29,700	5			
Monterey Public	33,000	5	City Council	4 yrs	No limit on terms
Bruggemeyer Memorial (Monterey Park)	64,600	5	City Council	3 yrs	2 term limit w/exceptions
National City	56,400	5	Mayor/Council	3 yrs	
Oceanside Public	149,500	5	Mayor/Council	3 yrs	
Ontario	141,100	5	Mayor/Council	3 yrs	No limit on terms
Orange Public	122,300	5	City Council	3 yrs	
Orland Free	13,050	5	City Council	2 yrs	Advise City Council
Palmdale City Lib	114,900	5	City Council	3 yrs	
Rancho Cucamonga	116,000	5	City Council	3 yrs	
A.K. Smiley Public (Redlands)	5,200	5	City Council	3 yrs	2 term limit; 1 intervening year required before reappointment
Santa Maria Public	111,440	5	City Council	3 yrs	No limit on terms
Sausalito Public	7,725	5	City Council	3 yrs	2 term limit
Sierra Madre Public	11,300	5	Mayor/Council	3 yrs	2 term limit; 1 intervening year required before reappointment
South Pasadena Public	25,150	5	Mayor/Council	3 yrs	2 term limit
Vernon Public	80	5	City Council	3 yrs	
Willows Public	13,800	5	City Council	3 yrs	
Woodland Public	44,150	5	City Council	3 yrs	2 term limit



## California General Law Cities with Library Boards—Advisory

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
Azusa City	44,650	5	City Council	3 yrs	City Council	2 consecutive terms;1 intervening year required before reappointment
Benicia Public	27,350	5	City Council	3 yrs	City Council/ City Manager	
Burlingame Public	36,120	5	City Council	3 yrs	City Librarian	No limit on terms
Carlsbad City	70,100	5	Mayor	4 yrs	City Council	2 consecutive terms;1 intervening year required before reappointment
Commerce Public	12,900	5	City Council	2 yrs	City Council	Not to exceed 2 years; expiring at next Municipal election
Covina Public	46,450	5	City Council	3 yrs	City Librarian	No limit on terms
Daly City Public	101,300	5	City Council	3 yrs	Mayor/Council	No limit on terms
El Segundo Public	16,250	5	City Council	3 yrs	City Council/ Library Director	2 consecutive terms
Larkspur Public	11,750	5	City Council	4 yrs	Library Director	No limit on terms
Lincoln Public	8,100	5	City Council	3 yrs	Librarian	2 term limit
Livermore Public	67,800	5	City Council	3 yrs	City Council; Lib. Director	3 yr. term; limited to 3 consecutive terms
Menlo Park Public	30,550	7	City Council	4 yrs	City Council; Head Librn.	2 term limit; 1 intervening year required before reappointment
Mill Valley Public	13,900	5	City Council	3 yrs	Library	2 term limit
Monrovia Public	39,400	5	Mayor/Council	3 yrs	City Council	No limit on terms
Oxnard Public	152,800	5	City Council	3 yrs	Library Staff	No limit on terms
Paso Robles Public	21,450	5	City Council	3 yrs	City Council	No limit on terms
Porterville Public	35,450	5	City Council	3 yrs	City Council	2 term limit
Rancho Mirage Public	13,690	5	City Council	4 yrs	City Council	City Council serves as Library Board. They appoint Library Advisory Commission
San Anselmo Public	12,300	8	Town Council	4 yrs	Town Council/ Librarian/Public	No limit on terms
San Marino Public	13,550	5	City Council	3 yrs	Library Management	No limit on terms; 2 alternates appointed
So.San Francisco Public	57,600	5	Mayor/Council	4 yrs	Library Director	2 term limit; 1 intervening year required before reappointment
St. Helena Public	5,725	5	City Council	4 yrs	City Council/ Librarian	No limit on terms
Upland Public	65,700	6	City Council	4 yrs	Library Director	
Yorba Linda Public	58,500	5	City Council	4 yrs	City Council	

## California Charter Cities with Library Boards -Administrative

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	Notes
Alameda Free	76,300	5	Mayor/Council	4 yrs	2 term limit; 1 intervening year required before reappointment
Alhambra Public	89,500	5	City Council	1 yr	1 year term for max of 8 consecutive terms, 1 intervening year required before reappointment
Arcadia Public	52,600	5	City Council	4 yrs	2 consecutive term limit; 2 intervening years required before reappointment
Belvedere-Tiburon	10,830	7 (Total)		3 yrs	
		3	City of Belvedere		
		3	City of Tiburon		
		1	Reed School Dist.		
Berkeley Public	105,900	5	City Council	4 yrs	
Folsom Public	43,300	7 (Total)		2 yrs	
		5	Individual Council members	4 yrs	Concurrent with Council member's terms
		2 (at-large)	City Council	2 yrs	
Los Angeles Public	3,681,700	5	Mayor/Council	5 yrs	No limit on terms
Newport Beach	70,000	5	City Council	4 yrs	2 term limit
Palm Springs Public	41,300	5	Mayor/Council	3 yrs	2 consecutive term limit
Pomona Public	141,400	5	City Council	4 yrs	
Redwood City Public	71,800	5	City Council	3 yrs	No limit on terms
Riverside Public	241,600	7	Mayor/Council	4 yrs	
San Bernardino Public	180,300	5	Mayor	4 yrs	
San Mateo Public	95,980	5	City Council	4 yrs	2 term limit
Santa Monica Public	91,400	5	City Council	4 yrs	2 term limit
Thousand Oaks	112,800	5	Elected	4 yrs	City Council also serves as Library Board; Council election every 2 yrs.

## California Charter Cities with Library Boards—Advisory

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
Anaheim Public	295,500	5	City Council	4 yrs	City Council	No limit on terms
Burbank Public	102,500	5	City Council	4 yrs	City Council	No limit on terms
Vista Public	156,100	5	City Council	4 yrs	City Council	2 consecutive term limit
Downey City	98,600	5	City Council	4 yrs	City Council	
Hayward Public	123,900	7	City Council	4 yrs	City Council	2 term limit
Huntington Beach	188,500	7	City Council	4 yrs	City Council	2 term limit
Inglewood Public	117,300	5	Mayor/Council	4 yrs	City Council	No limit on terms
Mountain View Public	73,000	5	City Council	4 yrs	City Council	2 term limit
Oakland Public	405,900	15	Mayor	3 yrs	City Council	2 term limit
Pacific Grove Public	17,050	5	Mayor/Council	4 yrs	City Council/ Mayor/Lib.Dir.	
Pasadena Public	138,900	7	City Board of Directors	3 yrs	City Board of Directors	2 consecutive term limit; 3 intervening years required before reappointment
Redondo Beach Public	64,700	7	Mayor/Council	4 yrs	City Council	2 term limit
Richmond Public	91,300	5	City Council	3 yrs	City Council	2 consecutive term limit
Roseville Public	62,700	5	City Council	4 yrs	City Council	2 consecutive term limit; 2 intervening years required before reappointment
Salinas Public	123,300	7	City Council	4 yrs	City Council	No limit on terms/terms may extend beyond 4 yrs.
San Diego Public	1,197,100	7	City Council	2 yrs	Mayor/Council/ City Manager	8 consecutive years;4 intervening years required before reappointment
San Jose Public	873,300	9	City Council	4 yrs	City Council	1 term limit; 4 intervening years required before reappointment
San Leandro Community	72,600	7	City Council	4 yrs	City Council	No limit on terms; appointed by Council District
San Mateo Public	95,980	5	City Council	4 yrs	City Council	2 term limit
San Rafael Public	53,400	5	City Council	4 yrs	City Council	

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**California Charter Cities with Library Boards—Advisory** (continued)

<b>Library Name</b>	<b>Population FY 1997/98</b>	<b>No. on Board</b>	<b>Appointed by Whom</b>	<b>Term of Office</b>	<b>If Advisory, Whom Board Advises</b>	<b>Notes</b>
Santa Ana Public	307,000	7	Mayor/Council	1 yr +	City Council	Minimum term of 1 year; no limit on terms
Santa Barbara Public	218,900	5	City Council	4 yrs	City Council	2 term limit
Santa Clara Public	100,000	11	City Council	4 yrs	City Council	2 term limit; 2 intervening years required before reappointment
Sunnyvale Public	129,300	5	City Council	4 yrs	City Council/ Lib Director	No consecutive terms; 2 intervening years required before reappointment
Torrance Public	141,500	7	City Council	4 yrs	Public Library	2 term limit
Tulare Public	40,350	5	City Council	4 yrs	Library Director	No limit on terms
Watsonville Public	36,650	7	City Council	4 yrs	Library/Council/ City Manager	2 term limit; 4 intervening years required before reappointment
Whittier Public	84,000	5	City Council	4 yrs	City Council/ Library Director	2 term limit

## California Counties with Library Boards— Administrative or Advisory or Both

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
Alameda County (4 boards)	523,500					
1. County Library Commission (15 total)		7	Board of Supervisors	2 yrs	Board of Sups./ County Librarian	2 consecutive term limit; Represent unincorporated areas (includes 1 or 2 members at large)
		6 w/6 alternates	City Council	Until reappt	Board of Sups/ County Librarian	Represent their cities; some are City Council members
		2	Library Commission	2 yrs	Board of Sups/ County Librarian	Members-at-large
2. Albany Library Board		7	City Council & 1 Friends Rep	Concurrent with City Council term	Albany City Council	
3. Fremont Library Advisory Commission		9	Mayor/Council	4 yrs	Co. Librarian/ Fremont City Council	2 term limit
			1 by Alameda Lib. Commission 1 by Friends 7 by Mayor			Council consent
4. Pleasanton Library Advisory Commission		7	City Council	4 yrs	City Council	
Alpine County	1,180	5	Board of Supervisors	4 yrs	Board of Sups/ Co. Librarian	No term limit. Members represents supervisorial districts
Auburn-Placer	138,875	8	Bd of Sups (6)/ Auburn City Council (2)	4 yrs	Board of Sups/ Lib. Director	2 term limit
Calaveras County	36,500	7	Board of Supervisors	4 yrs	Board of Sups/ County Librarian	No limit on terms. One represents each supervi sorial district and 2 at- large members
El Dorado County	142,200	5	Board of Supervisors	4 yrs	Board of Supervisors	Members represent supervisorial districts
Fresno County Free	58,670	12	Friends	3 yrs	County Librarian	Friends act as advisory Library Board group
Kings County	118,200	5	Board of Supervisors	4 yrs	Board of Supervisors	
Lake County	54,800	5	Board of Supervisors		Board of Supervisors	

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## California Counties with Library Boards— Administrative or Advisory or Both (continued)

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
Co. of Los Angeles Public Library	3,370,340	20 (total)				
		10	City Selection Committee/Board of Supervisors	2 yrs	Board of Sups/ County Librarian	Elected City Council members, 2 from each supervisorial district, from cities served by county libraries in the district
		10	Board of Supervisors	2 yrs	Board of Sups/ County Librarian	For all members, 2 term limit; w/exception by appointing authority
Marin County Free	132,310	15	Members of Board of Sups	3 yrs	Board of Sups/ Library Director	3 members appointed by Supervisor from his/her district
Mendocino County	85,900	9	Board of Sups (5)/City Councils (4)	1 yr	Board of Sups/ Library Director	No limit on consecutive terms
Merced County	201,000	15	Board of Supervisors	4 yrs	Board of Supervisors	
Modoc County	10,150	7 (Total)				
		5	Individual Sups	4 yrs	Board of Supervisors	2 term limit
		1 1	City of Alturas Friends of Lib.			
Mono County Free	10,400	5	County Board of Education	2 yrs	County Board of Education	No limit on terms
Orange County	1,280,650	23 (total)	Board of Sups of Supervisors	2 yrs	County Board	All members must be elected officials
		2	Board of Sups			
		21	City Council of cities served by library			
Santa Clara County Joint Powers Authority Board	387,940	11 (Total)				
		2-Bd of Sups; 9 City Council members	Determined by jurisdiction			Members must be currently serving on City Council or Board of Supervisors
Siskiyou County	44,400	5	Board of Supervisors	3 yrs	Board of Sups/ Lib. Director	Each appointed by supervisor

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**California Counties with Library Boards—  
Administrative or Advisory or Both** (continued)

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
Solano County (4 Boards)	244,150					
1. Advisory Council		10	Bd./Sup.(5) City Govts. (5)	4 yrs	Board of Supervisors	No limit on terms
2. Vallejo Library		7	City Council	4 yrs	City Council	2 term limit
3. Vacaville Library		5	School Dist. Lib. Dist. Bd.	3 yrs	Library District Board	3 term limit
4. Law Library Board Of Trustees		7	Judges (5); Bd of Sup (2)	unlimited	Lib.Dir/Law Library Staff	Law library contracted with County Library for library operation in 1987
Sonoma County (10 Boards)	426,400					
Library Commission		7	Bd of Sups appoints 5; Petaluma/Santa Rosa City Councils each appoint 1	4 yrs		Operates under Joint Powers agreement Administrative Board
Regional Branch Library Advisory Boards			Library Commission		Lib. Com./ respective City Councils	Additionally a City Council member, appointed by each respective city, serves as liaison on each Advisory Board
1. Cloverdale		8		4 yrs		
2. Guerneville Regional		9		4 yrs		
3. Healdsburg		8		4 yrs		
4. Petaluma		6		4 yrs		
5. Rohnert Park-Cotati		6		4 yrs		
6. Santa Rosa		9		4 yrs		
7. Sebastopol		9		4 yrs		
8. Sonoma Valley		7		4 yrs		
9. Windsor		7		4 yrs		
Stanislaus County Free	419,500	9	Board of Supervisors	3 yrs	Board of Sups/ County Librarian	
Sutter County	74,700	8	Appointed by:	3 yrs	Director of Lib. Services	3 term limit
		(Total) 5	Each Bd.of Sups. member			
		1	Bd.of Sups.			
		1	Yuba City			
		1	Live Oak			
Tulare County Free	279,830	15 (5 alts)	Board of Supervisors	4 yrs	Board of Sups/ Library Director	No limit on terms
Ventura County	424,700	8 (total)				
		7	City Councils	No term specified	Board of Supervisors	
		1	Bd. Of Sups.			

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**California Counties with Library Boards—  
Administrative or Advisory or Both** (continued)

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
Yolo County	110,350	8	Board of Supervisors	4 yrs	County Librarian	5 regular members appointed by each supervisor and 1 member from each of the 3 cities served by library
Yuba County	60,500	7 (total)	Mbrs. of Bd. Sups.	Coincides with appointing Bd. member	Board of Sups/ County Librarian	1 member appointed by each supervisor from his/ her district
		1	Chair, Bd. of Sups or designee	No term specified		
		1	Mayor of Marysville or designee	No term specified		

## California Combined City-County Libraries with Library Boards— Administrative, Advisory or Both

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
<b>Administrative Boards</b>						
Sacramento Public Library Authority	1,097,290	9 (total)				
		5	Bd. of Sups.	Concurrent with terms of Bd. of Sups.		All members are elected officials
		4	Sacramento City Council	1 yr		
Santa Cruz City County	9 (total)				4 yrs	
		2	Bd. of Sups			
		2	Santa Cruz City Council			
		1	Capitola City Council			
		1	Scotts Valley City Council			
	3	Citizens, Bd.of Sups appts.				
<b>Advisory Board</b>						
Napa City-County (General law city and county)	115,100	8 (total)			3 yrs	Board of Supervisors
		3	Bd. of Sups			
		2	City of Napa			
		1	City of American Canyon			
		1	City of Calistoga			
	1	Town of Yountville				
San Francisco Public (Charter city & co.)	778,100	7	Mayor	4 yrs	Mayor/Board of Sups	No limit

## California Special Library Districts & Unified School or Union High School - Special Library Districts

Library Name	Population FY 1997/98	No. on Board	Appointed by Whom	Term of Office	If Advisory, Whom Board Advises	Notes
<b>Special Library Districts Administrative Board Only</b>						
Altadena (Los Angeles County)	49,100	5	Elected	4 yrs		No limit on terms
Beaumont (Riverside County)	21,490	5	Elected	4 yrs		No limit on terms
Blanchard (Santa Paula) (Ventura Co.)	26,500	5	Elected	4 yrs		No limit on terms
Buena Park (Orange County)	73,100	5	Elected	4 yrs		No limit on terms
Del Norte County	28,250	5	Elected	4 yrs		No limit on terms
Palo Verde Valley Dist. (Riverside County)	40,400	3	Elected	4 yrs		No limit on terms
Palos Verdes (Los Angeles County)	69,800	5	Elected	4 yrs		No limit on terms
Placentia (Orange County)	48,600	5	Elected	4 yrs		No limit on terms
Susanville (Lassen County)	17,100	5	Elected	4 yrs		No limit on terms
<b>Unified School-Special District Library Districts</b>						
Banning Administrative (Riverside County)	26,050	5	Elected	4 yrs		School Board also Library Board. Also 5 member advisory commission is appointed by Library Board
Coalinga—Huron Administrative (Fresno County)	18,160	5	Elected	4 yrs		School Board also Library Board
Dixon (2 boards) (Solano County)	20,090					
1. Governing Board of Library Trustees Administrative		5	Elected			School Board also Library Board
2. Dixon Library Commission Advisory		5	Board of Library Trustees	3 yrs	Bd. of Library Trustees	

## *Appendix G*

# Reference Bookshelf

American Library Association. **ALA Handbook of Organization**. Chicago: American Library Association, annual publication.

American Library Association. **Intellectual Freedom Manual**, 5th edition. Compiled by American Library Association, Office for Intellectual Freedom Staff, January 1996.

Baughman, James C. **Policy Marking for Public Library Trustees**. Englewood, Colorado: Libraries Unlimited, Inc., 1993.

California Fair Political Practices Commission. **Guide to the Political Reform Act: California's Conflict of Interest Laws for Political Officials**. Sacramento: California Fair Political Practices Commission.

California Library Association. **California Intellectual Freedom Handbook**. California Library Association Intellectual Freedom Committee, 1992.

California State Library. **California Library Laws - 1998**. Sacramento: California State Library, 1998.

California State Library. **California Public Library Statistics**. Sacramento: California State Library, annual publication.

Ihrig, Alice B. **Decision Making for Public Libraries**. Hamden, Conn: Library Professional Publication, 1989.

Kinney, Lisa F. **Lobby for Your Library. Know What Works**. Chicago: American Library Association, 1992.

Short, Jack. **Library Trustee Guidelines**. Avon, Conn: Consultant Publications, 1994.

Wade, Gordon S. **Working Together: A How-To-Do-It Manual for Librarians**. New York: Neal-Schuman Publishers, 1992.

Weingard, Darlene E. **Administration of the Small Public Library**. Chicago: American Library Association, 1992.

Wolfe, Lisa A. **Library Public Relations, Promotions, and Communications: A How-To-Do-It Manual**. New York: Neal-Schuman, 1997.

Young, Virginia G. **The Library Trustee, A Practical Guidebook**, 5th edition. New York, Bowker, 1995.

### **Library Journals and Other Publications**

**ALTA Newsletter**. American Library Trustee Association, American Library Association, Chicago, Illinois. Received as part of ALTA membership.

**American Libraries**. American Library Association, Chicago, Illinois. Monthly. Received as part of American Library Association membership.

**California Libraries**. California Library Association, Sacramento. Monthly publication.

**California Library Directory.** California State Library, Sacramento, California. State Library annual publication.

**CALTACTICS.** California Association of Library Trustees and Commissioners. Quarterly. Received as part of CALTAC membership.

**Entering the 21st Century: California's Public Libraries Face the Future.** 1996 Institute for the Future, California State Library.

**Library Journal.** R. R. Bowker Company, New York. Semimonthly, except monthly in July and August. Also includes **School Library Journal.**

**Library of California.** California Networking Task Force, California State Library, January 1996.

**Library Trends.** University of Illinois, Graduate School of Library Science. University of Illinois Press, Urbana, Illinois. Quarterly.

Each issue specializes on one subject: governance of libraries, library cooperation, employee organizations and collective bargaining, federal aid, are examples.

**Public Library Trustee.** American Library Association, Chicago, Illinois. Irregular publication. Received as part of ALTA membership.

**Restructuring California Public Libraries.** Joint task force report and recommendations. To order report, contact the California State Library (916) 653-5217.

**Trustee 2000: Change, Changes, Changed, Changing...** Langa Communications. Rhinebeck, N.Y., 1995. Videocassette.

**Washington Newsletter.** American Library Association, Washington Office. Washington, D.C.

**Note:** Many issues involving libraries pass through Congress and the State Legislature each year. For current information contact your librarian, CLA, the Library Development Services at the State Library, or the California State Government web site.